

Music Services Feasibility Study

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Executive Summary

The brief for this feasibility study was concerned with identifying and assessing options for the future delivery of Music Services in Wales. It was to consider existing methods of delivery of education services across Wales, identify best practice, consider alternative models in line with the needs and demands for such services, and consider the feasibility of the options available. A particular focus rested upon considering whether or not responsibility for delivery should be transferred to a single national 'arm's-length' body, presenting options in respect of what form this body should take and considering whether or not a National Plan for Music Education should be prepared.

The feasibility study built upon a large body of existing work that had been undertaken in Wales, notably by the Task and Finish Group on Music Services in Wales, which was set up by the then-Minister for Education and Skills and the National Assembly for Wales Culture, Welsh Language and Communications Committee's inquiry into funding for and access to music education. While this work had identified the same key challenges with regard to the lack of consistency and coherence in the provision of Music Education Services in Wales, conflicting conclusions were drawn from the findings. An important aim of this feasibility study, therefore, was to develop a more detailed understanding of the implications of and requirements for stronger national coordination of the delivery of Music Education Services.

In undertaking the stakeholder research, it soon became clear that the issues with which previous work had struggled stemmed from highly complex challenges at several levels:

- Complexity of detail in terms of coordinating the deployment of music tutors, instruments, curricular support, and a wide range of different offers related to musical experiences and music tuition, with diminishing resources and an unclear status of Music Education Services in schools in Wales.
- Strategic complexity in terms of adapting Music Education Services to a changing landscape with respect to the understanding of how Music Education Services need to be designed to deliver upon specific outcomes (e.g. equity of access, well-being, identification of and progression for musical talent).
- Political complexity in terms of strained relationships between key stakeholders, pressures upon the existing delivery infrastructure, and considerable historical 'baggage' that prevented progress in finding joint solutions with regard to introducing consistency and coherence in the provision of Music Education Services in Wales.

The conclusion drawn from this early finding was that the research and analytical work to be undertaken for this feasibility study needed to relate primarily to the issue of strategic coordination, i.e. the question of how a suitable framework could be created that would support stakeholders in jointly developing an understanding of what music education provision in Wales would need to look like in order to achieve specific outcomes and objectives.

An analysis of the structure and governance of current provision confirmed the picture of a system in a state of flux with very little consistency and coherence in terms of the nature, cost and charging of provision and with a limited focus upon outcomes. Furthermore, the

stakeholder research pointed to concerns surrounding the sustainability of music teaching as a career. Financial pressures were consistently highlighted as a formidable constraint upon strengthening the position of music in schools and making Music Education Services available in an equitable way.

The important interplay between musical experiences, music education or tuition, and music teaching emerged as an important lens through which to consider how resources would best be allocated in order to achieve a range of outcomes related to music education: musical experiences as short-term interventions designed to stimulate interest in music; music education or tuition as an offer to those willing to make a long-term extracurricular commitment to music; and music teaching as the core responsibility for schools to lay the foundations for any engagement with music.

The stakeholder interviews revealed an ongoing debate surrounding the shape of the most appropriate music education in terms of content, teaching approaches and the range of outcomes to be achieved. Developing a new delivery model for music education in Wales will therefore need to go beyond a reorganisation of how music tuition is delivered and paid for. Instead, it will need to draw upon an overarching understanding of how the whole range of different offers can complement one another so that music is accessible for children and young people in line with their ability and preferences. A key requirement for the design of such a new delivery model is that of recognising that better strategic integration of provision at different levels, using different funding streams and being framed in different organisational and policy objectives, is an essential first step.

The development of options was preceded by a consideration of alternative delivery models and of what a National Plan would need to include in order to help shape a different delivery environment for music education in Wales.

Alternative delivery models exist at a number of different levels, ranging from the highly successful Denbighshire Music Co-operative, which delivers a portfolio of services that are very similar to current local authority Music Education Service provision and different configurations of public services under the auspices of local authority coordination, to the hub infrastructure in England and different ways of funding Music Education Services in Scotland. This understanding of different mechanisms and levers with which to shape provision in going forward is reflected in the nature and structure of the options presented in this report.

Stakeholder views and the recurring calls for greater coherence and better coordination suggest that there should be a National Plan for Music Education in Wales. Such a plan would need to be owned by key stakeholders in Wales and used to embed a number of principles and aspirations in the development of Music Education Services in Wales in going forward. A blueprint for such a plan is set out in the report so as to offer an initial discussion template for stakeholders in Wales.

Alongside the current providers and individual music tutors, key stakeholders crucially include schools that have an essential role to play in making music education accessible for learners in Wales. Feedback from current Music Education Service representatives

suggests that cost and the relative interest in music education on the part of headteachers are important determinants of curriculum-based provision and the use of Music Education Services. Reaching decision makers at the school level and engaging them in this debate will be vital in strengthening music education in Wales. Additional research should therefore be undertaken with schools in order to test the different options and understand how they can effectively be engaged in achieving outcomes related to music education.

The Welsh Government has a number of levers at its disposal for influencing and helping to shape the provision of music education in Wales. Strategic collaboration with key stakeholder organisations is essential, alongside direct Welsh Government levers such as funding (e.g. additional targeted funding), legislation (e.g. statutory guidance to accompany the new curriculum), and specific delivery mechanisms (e.g. quality control mechanisms, a qualification framework for music teachers, the use of KPIs in contracts). All of these provide opportunities for individual interventions or can be deployed as part of an overarching delivery model.

Five possible options for such a delivery model are outlined in this report for Welsh Government and the Minister to consider :

1. The status quo – a disparate service which is gradually shrinking with loose coordination, based upon local authority provision
2. Allowing the market to determine provision
3. A strong national coordinating body run by providers, including local authorities/co-operatives/charities/private businesses, and individual tutors. This would be an extension of CAGAC (Cymdeithas Addysg Gerdd Awdurdodau Cymru/Welsh Authorities Music Education Association), which is a subcommittee of ADEW (Association of Directors of Education in Wales), forming a more representative formal body
4. A regional service with a national coordinating body
5. A national service

Each option is discussed in terms of a consistent set of criteria and considerations and some may be more desirable and/or feasible than others. The stakeholder interviews confirm that the majority of the options that can potentially be put forth will face the issue that improving Music Education Services and the equity of access ultimately depends upon somebody paying for it. The choice of an option will therefore, to some extent, be determined by the availability of funding to support a new infrastructure and enhanced provision.

The two options without a national body — the status quo and allowing the market to determine provision — require very limited intervention or additional funding. However, they are unlikely to overcome current issues surrounding consistency and coherence and, in particular, limited equity of access, sustainability of the workforce, and appropriate progression routes for talented pupils.

The three options with a National Plan and a national coordinating body all introduce a way of pooling and providing coherence to the use of governmental funding for Music Education Services while creating different kinds of fora for stakeholders to play a role in making decisions regarding the development and delivery of Music Education Services. They vary with regard to the balance between local accountability and national coordination.

The use of framework contracts is put forth as a key mechanism with which to create an effective link between the National Plan, wider debates surrounding the nature of Music Education Services, and delivery on the ground.

Where additional funding is required for any of the options, limited funding routes other than using public funding are likely to be available.

Developing a National Plan for Music Education that is endorsed by key stakeholders is an important first step in ensuring that national consistency and coherence can be achieved. It will therefore be important to initially test the options as put forth in this report with all key stakeholders.

Conclusions:

- The development of a National Plan for Music Education should be considered.
- The Welsh Government should consider whether a new organisation is required to develop and deliver the plan. The suggested options should be tested with strategic stakeholders and providers of Music Education Services.
- Schools are the key decision makers in how music education is delivered. Further research should be considered to examine how they make this decision and what factors they consider.
- Sustainability of the music tutor workforce is a cause for concern. Further work should be considered to gain the views of music tutors regarding their terms and conditions.

1 Introduction

As a consequence of the recommendations of an inquiry in 2018 by the National Assembly Culture, Welsh Language and Communications Committee into funding for and access to music education in Wales, Consultancy.coop LLP was commissioned by the Welsh Government to conduct this feasibility study in order to identify and assess options for the delivery of Music Services in schools in Wales.

The Committee's June 2018 report identified two main themes surrounding equality of provision and equality of access and made 16 specific recommendations for improving provision. The report and its recommendations considered both the perspectives of pupils' access to music education and the opportunities for staff working within the music sector.

The report found that there is disparity across Wales as to what activities the various local Music Services cover, but these may include:

- General music provision/education
- Music instrument tuition
- Provision of musical instruments
- Ensembles at local authority and regional level
- Support for school music teachers.

We have found that, in the main, Music Services are provided by local authorities. However, there is no statutory responsibility and services are sometimes delivered by the local authority itself, and sometimes by other organisations. There are two co-operatives, charities, and a number of private companies providing services. Instrument or voice tuition is provided by peripatetic music teachers who are either directly employed by the service or are under contract as self-employed.

The ultimate aim identified through the inquiry is that of equality for all. Any student in any part of Wales would have the same access to music education; thus, a child wishing to learn a musical instrument in Anglesey should have the same chance as one in Cardiff, and a child receiving free school meals should have the same opportunities as any other.

The brief:

The aim of this study is to identify and assess options for the future delivery of Music Services in Wales.

Objectives

1. Review existing and generate new evidence to identify current methods of delivery of Music Education Services across Wales.
2. Identify best practice in existing methods of delivery of Music Education Services across Wales.
3. Consider alternative models of Music Education Services, identify the needs and demands for such services and recommend support for alternative services.
4. Review existing and generate new evidence to consider the feasibility of options available for the delivery of Music Education Services across Wales. This will need to:

- a. Consider whether or not responsibility for delivery should be transferred to a single national 'arm's-length' body and present options for what form this body should take (together with funding options for any proposal).
 - b. Identify and consider what other options for the delivery of Music Services across Wales could be feasible and deliverable.
5. Consider whether or not a National Plan for Music Education should be prepared and, if so, identify and recommend the content of any National Plan for Music Education.

This report focuses upon considering different overarching governance and delivery arrangements that can create the enabling structures and mechanisms with which to work towards consistent and coherent provision throughout Wales.

Methodology

The following research and analytical tasks were undertaken to provide the evidence suitable for review, in order to generate the options considered for this feasibility study report.

Review of existing information relating to the situation in music education in Wales and other countries:

The written evidence reviewed:

- The Task and Finish Group report 2015 and subsequent updates to 2019
- Hitting the Right Note – Culture, Welsh Language and Communications Committee report 2018
- The survey of provision which was carried out in 2015
- Various documents relating to the Curriculum for Wales, including the Draft Statutory Guidance on the Expressive Arts Area of Learning and Experience
- Securing a future for the National Youth Arts ensembles of Wales 2016
- Using the Pupil Deprivation Grant in support of arts and cultural activity
- Guidance on using the Pupil Deprivation Grant – What really works?
- Guidance for school bodies on charging for school activities
- Estyn – best practice in the creative arts at Key Stages 3 and 4 – 2016
- The Importance of Music – A National Plan for Music Education in England – 2011
- The State of Play, a review of music education in England 2019 – Musicians' Union, Music for All, Music Industries Association, UK Music
- International Best Practice in Music Performance Education Models and Associated Learning – Outcomes for Wales – Prof. Paul Carr, University of South Wales
- What's Going on Now? – A study of young people making music across Scotland – 2019
- Instrumental Music Services – Summary Tables – Scottish Government 2018.

Stakeholder interviews

We undertook one-to-one interviews with relevant key stakeholders as identified in discussions with Welsh Government officers. The interviews were conducted either face to face or via telephone, using a structured framework with senior individuals from the organisations in Table 1:

Table 1. Organisations included in stakeholder interviews

Stakeholder Group Named in the Brief
Association of Directors of Education in Wales (ADEW)
Welsh Local Government Association (WLGA)
Royal Welsh College of Music & Drama (RWCMD)
National Youth Arts Wales (NYAW)
Arts Council Wales (ACW)
BBC National Orchestra of Wales (BBC NOW)
Welsh Authorities Music Education Association (CAGAC)
Music Education Council (MEC)
Welsh National Opera (WNO)
Welsh Government
Curriculum for Wales
Pupil Development Grant
Arts Division
National Assembly
Bethan Sayed AM, Chair of the National Assembly for Wales Culture, Welsh Language and Communications Committee
Rhianon Passmore AM, Chair of the National Assembly Cross-Party Music Group
Other Parties
Anthem – music endowment charity
Acting Head of Northern Ireland Music Service
Education Workforce Council
Estyn
Denbighshire Music Service
CAVMS Ltd. – Cardiff and Vale Music Service
The Musicians' Union

CAGAC

Local authority Heads of Music Services meet regularly as CAGAC (Cymdeithas Addysg Gerdd Awdurdodau Cymru/Welsh Authorities Music Education Association), which is a subcommittee of ADEW (Association of Directors of Education in Wales).

We met the Executive Committee, and then attended a full meeting of all members, and held a further meeting with the Chair.

A comprehensive survey document was sent to all local authority Heads of Music Services, nominated officers for those with no service, the charity which covers Gwynedd and Anglesey on behalf of those authorities, and the co-operatives which cover Denbighshire and Wrexham. We then followed up via telephone and, in some cases, with face-to-face meetings so as to gather as much information as possible. We have data from 11 interviews and 14 survey forms which cover 21 of the 22 local authorities in Wales.

Others

In order to gain some insight into what is happening on the ground, we decided to conduct a small number of scoping interviews to gather the views of stakeholders with direct experience of Music Service provision in schools. We used these to tease out issues and identify pointers for interviews with stakeholders. We used our existing Wales-wide networks, as well as meetings which had been set up for other purposes, to gather views. We talked to 12 headteachers in 9 local authorities, both primary and secondary, 20 chairs of governing bodies in 7 local authorities, and a small number of parents from 10 schools in 7 local authorities.

2 Background and Context

2.1 Policy and Regulatory Context

Traditionally, the concept of a Music Service applied to the department within a local authority which provided local-authority-wide support for music education, peripatetic music staff deployed in schools, perhaps an advisory service for teachers of music, and, latterly, musical experiences. Providing a Music Service is not a statutory obligation for local authorities, and there is little commonality in which services are delivered, how they are delivered or even whether they are delivered at all. There are now private businesses, charities, co-operatives, social businesses, and individuals providing one or more of these activities, including complete Music Services. Any of these organisations, including local authority Music Services, can and do operate across local authority boundaries.

Providing the teaching of music in schools is a statutory requirement within the current National Curriculum at Key Stages 2 and 3. The requirement to provide music teaching will be strengthened in the Curriculum for Wales being introduced from September 2022, as part of the Expressive Arts Area of Learning Experience (AOLE). Within this AOLE music is explicitly included as well as art, dance, drama, film, and digital media. The Draft Statutory Guidance¹ was published in April 2019 for feedback. It details the progression steps and

¹ [Draft Statutory Guidance – Expressive Arts](#)

achievement outcomes expected of learners. Moreover, it considers the elements and forms which each learner should be expected to master in each progression step. These have been developed over the past few years by Pioneer Schools at both primary and secondary levels throughout Wales. These schools are now disseminating their experiences widely as the process of implementing the curriculum begins.

This is a major shift in the framework within which music will be taught in schools, and Music Services will need to be an important element in its successful delivery.

Introducing the Curriculum for Wales is a major task but is only one of a number of simultaneous changes being implemented in Welsh education. New initial teacher training processes, Welsh Government control of teachers' pay and conditions, new standards of professional learning for the teaching workforce, the new Additional Learning Needs legislation, the development of new evaluation and improvement arrangements and introduction of new performance measures for schools, and potential new qualification frameworks are evidence of the largest changes to Welsh education for decades. The challenge lies in ensuring that whatever is proposed for music education fits in with all of these initiatives.

2.2 Previous Work

The Task and Finish Group

There has been concern for some years surrounding music education amongst the stakeholders involved across the system². In January 2015 a Task and Finish Group was set up by the then-Minister for Education and Skills 'to consider the provision of music services and to develop proposals for ensuring that, despite the difficult financial climate, local authorities can continue to deliver high- quality services to learners across Wales.' The Task and Finish Group reported in June 2015. In January 2017 the National Assembly for Wales Culture, Welsh Language and Communications Committee began an inquiry into funding for and access to music education, the report of which was published in June 2018. Welsh Government produced two updates on the Task and Finish Group's report in response to the Committee recommendations – a one year on update and a final update. These two main initiatives have therefore gathered evidence from a number of sources and stakeholders investigating the state of music education in Wales and endeavouring to find solutions to the issues that the sector faces.

In chronological order, the four publications produced by these two groups are:

- Report of the Task and Finish Group on Music Services in Wales – June 2015³
- Welsh Government update - Task and Finish Group: Music Services: One year On – 2017⁴

²: [An independent report for the Welsh Government into Arts in Education in the Schools of Wales 2015](#)

³ [Report of the Task and Finish Group of Music Services in Wales](#)

⁴ [Music Services: One Year On](#)

- National Assembly for Wales: Culture, Welsh Language and Communications Committee: Hitting the Right Note: Inquiry into funding for and access to music education – June 2018⁵
- Welsh Government Update -Task and Finish Group: Final Progress Report – April 2019⁶

The Task and Finish Report in 2015 painted a picture of a service which was in a state of flux:

‘Music Services across Wales vary greatly in terms of range, take-up and affordability. Access for learners is further impacted by geography and significant pockets of high deprivation. Support for schools varies between market-led provision on the one hand, total LA support on the other, and a mixed economy in many areas. There is significant variation in the cost of lessons paid for by schools or passed on to parents. Schools may subsidise the tuition costs charged to parents in varying degrees.’

And:

‘In summary, we consider the challenges to continued delivery of high-quality Music Services provision to include:

sustaining and developing high-quality Music Services provision in the context of reduction in school and LA budgets and of competing priorities;

disparity of existing provision, growing inequality of opportunity to access services;

geographical barriers to specialist tuition; supply and quality of specialist instruments; high levels of deprivation;

availability of provision for Welsh-medium learners;

increasing reliance on pupils and parents to cover tuition costs.

Furthermore, they concluded:

‘Schools are at the heart of instrumental and vocal music tuition, and all schools should provide the opportunity for children and young people to learn to play and sing. Currently, provision in some schools relies too heavily on the attitudes and priorities of school leadership teams.’

⁵ [Hitting the Right Note: Inquiry into funding for and access to music education](#)

⁶ [Report of the Task and Finish Group on Music Services in Wales - Final Progress Report](#)

The Task and Finish Group made a series of recommendations aimed at making the services more uniform and arresting their erosion. They suggested that local authorities should work more collaboratively and encourage schools and governing bodies to adopt clear and fair charging policies for music tuition. They proposed regional hubs as a possible mechanism for streamlining provision. There had been no definition of what service a Music Education Service should provide, so they proposed Terms of Reference for Music Services in Wales, which are appended to this report in Appendix 1.

The Final Progress Report by the Welsh Government in April 2019 reported that, essentially, while some progress had been made regarding its recommendations, such progress was slow, largely because of funding cuts:

‘A number of challenges were reported in the last update report regarding ensuring consistent and collaborated services across local authorities. These centred around funding difficulties particularly in rural areas where there are additional barriers due to demand and demographics.’

‘The majority of local authority provision is working towards meeting the objectives as set out in the terms of reference (Appendix 1 in this report) although funding issues have caused some difficulties in many areas.’

This is consistent with the verbal report of the Chair of the Task and Finish Group to the Culture Committee inquiry. Local authorities have been reducing their expenditure on non-statutory services; Music Services are no exception.

National Assembly for Wales: Culture, Welsh Language and Communications Committee inquiry

The 2018 Culture, Welsh Language and Communications Committee report⁷ took evidence from a wide range of sources and made a series of recommendations. A key quotation from the report in relation to its recommendation that there be a national response to the provision of Music Services is as follows:

‘The provision of music services across Wales lacks consistency. Local authorities provide very different opportunities in relation to both the music education available to school pupils and to those working within the music education sector.’

The Hitting the Right Note report made 16 recommendations, the strongest of which was for the creation of a National Music Plan for Music in Wales and suggested that this should be delivered by an ‘arm’s-length’ national body. Several of the recommendations made suggestions as to how such a plan might be implemented, e.g. asking for wide consultation with relevant stakeholders and suggesting an advisory body to monitor its progress. The

⁷ Hitting the Right Note: <http://www.assembly.wales/laid%20documents/cr-ld11595/cr-ld11595-e.pdf>

Minister, in her formal response, indicated that a National Music Education Plan would fall within her remit.

The Committee recommended that implementation of the Task and Finish Group's recommendations be accelerated. Furthermore, it looked at several other items which are outside of the scope of this study, such as the provision of more funding for musical instruments and how the National Endowment Fund for Music — now Anthem — would operate.

The Committee recommended that there be an Estyn thematic review of Music Education Services. Stakeholders indicated that this would be difficult in the absence of any statutory framework regarding what should be provided. We consider the issues of quality control and consistency later in the report.

Three other key themes from the Committee's report were identified, which we have used as the basis of examining the options in this report. This is because they were also highlighted by a number of the stakeholders to whom we talked:

- The Committee took evidence on the terms and conditions of employment of Music Service staff. They recommended that the Welsh Government encourage local authorities to review them 'as a matter of urgency'. There were concerns surrounding the long-term sustainability of the workforce.
- Equality of access to music education is very important. The low take-up of music tuition by lower-income families and, in particular, eFSM learners was highlighted by several witnesses. The Committee recommended better promotion of the use of Pupil Development Grant funding for music education.
- Several witnesses were concerned about how the current system operates with respect to progression opportunities for talented musicians. There was concern surrounding how the 'Welsh pyramid' progression to national ensembles could be made more equitable. The report recommended that greater funding be made available 'in order to ensure that every pupil who wishes to progress towards excellence can do so'.

Looking at the Cabinet Secretary — now Minister for Education's — evidence to the Committee, her concerns mirrored many of those of the overall committee; for instance, in her oral evidence, she recognised that 'there are challenges in ensuring that all young people, regardless of their background and personal circumstances, are able to benefit'.

Moreover, she stated:

'I want to develop an education system based on the principles of equity and excellence. Therefore, I see my role and the role of the state as trying to mitigate, wherever possible, those disadvantages that some children, through no fault of

their own, are suffering.’ (Minister for Education – committee evidence session 12⁸)

In relation to the Curriculum for Wales and its impact upon music education, she made an important point as to where responsibility lies:

‘In terms of local authority Music Services, they will have an opportunity to feed into that process, but in the end, the delivery of the new curriculum post 2020 or 2021 will, again, be a matter for individual schools as to how they best see delivering the AoLE within their own individual institution.’ (ibid.)

She recognised that funding is a challenge for local authority Music Services:

‘It is challenging and, as you said, it is a mixed picture, and, because many counties have devolved funding down to schools, it’s very difficult to be able to get a grasp on exactly all the funding that is available. What’s important to me is to look at the evidence of impact of spend, because we spend a lot of time looking at inputs, but actually we need to look at the output of that spend and the activity that is going on. What’s important to me is that music is a crucial part of all aspects of our current curriculum.’ (ibid.)

Throughout the report, it is clear that the Committee and the Minister understood that the primary decision making in respect of the provision of music education is at the school level.

2.3 Current Funding for Music Services

Funding for statutory-age education in schools in Wales, as for other services delivered by local government, is provided primarily by the Welsh Government through the local government revenue settlement (Revenue Support Grant – RSG). The funding is not ring-fenced, as the Welsh Government considers local authorities to be best placed to judge local needs and circumstances and fund schools accordingly.

Local authorities can therefore use this funding and other sources of locally raised revenue funding to best meet the needs of all the services for which they are responsible.

Responsibility for the funding and delivery of Music Services in Wales ultimately rests with local authorities. It is for local authorities to decide what level of support they provide to Music Services in their area, based on their understanding of local needs and priorities.

Schools have the opportunity to influence their local authority decisions regarding school budgets by engaging in dialogue with authorities, including through their budget forum, which is required by law. Authorities must consult their school budget fora and all schools in their area when setting or making changes to a funding formula. The main purpose of the

⁸ [Committee Evidence Session 12](#)

forum is to provide all major stakeholders with an opportunity to offer advice to, and enter into discussion with, the local authority with respect to school budgets in each financial year. Once funding is distributed, it is for the headteacher and the governing body of each school to decide how the school's budget should be spent.

The Welsh Government has made available additional funding of £3 million for music education provision in 2018/2019 and 2019/2020 — this has been distributed via the Welsh Local Government Association to local authorities. This was to be used to enhance music provision in line with a range of suggested criteria to meet local needs including:

- Purchasing new and endangered instruments
- Ensuring all pupils have access to lessons, exams and courses
- Covering costs of attendance at orchestras, choirs and bands
- Initiating a 'rock and pop' ensemble
- Supporting music co-operative arrangements

National Youth Arts Wales has received £100,000 to continue their Music Services, including youth ensembles.⁹

What is more, schools receive an annual Pupil Development Grant based on the number of pupils eligible for Free School Meals (eFSM). Each school draws up a publicly available plan for how it will use the Pupil Development Grant in order to improve the attainment of its eFSM pupils. Music education and musical experiences can be included in these plans.

Schools are usually free to make their own arrangements regarding where they choose to source the provision of music education, musical experiences and music teaching through the use of these resources. They can choose to use their own staff, buy in from the local authority if it has a Music Service, or source provision from any other provider. In discussion with stakeholders, we were told that there may be a presumption that schools use the local authority Music Service and in a small number of local authorities, it could be ring-fenced by the local authority to be spent only in that way.

Moreover, schools are able to take advantage of various initiatives in delivering musical experiences by national and local charities such as Welsh National Opera or the BBC National Orchestra of Wales, which are normally free. This could be in the form of a 'music day or week' or a more long-term intervention.

Legislation allows schools to charge parents for musical instrument or voice tuition in certain circumstances. Welsh Government Guidance explains that :

'Although the law states that all education provided during school hours must be free, music lessons are the exception to this rule. Schools may charge for musical instrument tuition provided that individual pupils, or a group of not more than four pupils, if teaching is not an essential part of either the National

⁹ [Welsh Government Press Release 19th December 2019](#)

Curriculum or a public examination syllabus being followed by the pupil.’
(Guidance for Governing Bodies on Charging for School Activities)¹⁰

In the majority of cases, stakeholders indicated that parents/guardians pay for lessons provided during school hours on school premises to the school or directly to the provider. Furthermore, parents/guardians can choose to pay for lessons outside of school hours. These can be from the provider used by the school, but may be arranged independently.

We were told that musical experiences in schools tend to be free, as they are essentially part of the curriculum, although parents/guardians might be asked to contribute towards trips to performances, in which case the normal guidance on charging applies.

Participation in ensembles at the local authority, regional or national level is also chargeable to parents/guardians, although there may be charitable support available for lower-income learners through the Friends charities which are associated with some Music Services. National Youth Arts Wales has a financial support scheme for national ensembles.

The Welsh Government published Creative Learning through the Arts – An Action Plan for Wales 2015-2020, in March 2015¹¹. This relates to all aspects of the expressive arts, not specifically music. The plan sets out a range of actions to be taken forward by the Welsh Government and the Arts Council of Wales. The Welsh Government has committed £10 million over five years to match the £10 million committed by the Arts Council of Wales’ lottery funding. Within the plan are two work streams: the Lead Creative School Scheme¹² and the All-Wales Arts and Education Programme¹³, which includes the four Regional Arts and Education Networks¹⁴. While the original Creative Learning through the Arts programme will end in March 2020, an extension programme will operate over 2020-2022, to help embed the arts and creativity in the new Curriculum for Wales.

3 Requirements for Music Education in Wales

The benefits of music education are uncontroversial and well documented through academic research. These include the external cognitive¹⁵ physiological¹⁶, psychological¹⁷,

¹⁰ [Guidance for Governing Bodies on Charging for School Activities](#)

¹¹ [Creative Learning through the Arts](#)

¹² [Lead Creative Schools](#)

¹³ [All-Wales Arts and Education Programme](#)

¹⁴ [Regional Arts and Education Networks](#)

¹⁵ See e.g. Anvari, S. H., Trainor, L. J., Woodside, J., & Levy, B. A. (2002). Relations among musical skills, phonological processing, and early reading ability in preschool children. *Journal of Experimental Child Psychology*, 83 (2), 111-130.; Gromko, J. E. (2005). The Effect of Music Instruction on Phonemic Awareness in Beginning Readers. *Journal of Research in Music Education*, 53(3), 199-209.; Daltrozzo, J. & Schön, D. (2009). Conceptual processing in music as revealed by N400 effects on words and musical targets. *Journal of Cognitive Neuroscience*, 21(10): 1882-1892.

¹⁶ See e.g. Ferguson, K. (2006). Social capital and children's wellbeing: a critical synthesis of the international social capital literature. *International Journal of Social Welfare*, 15(1), 2.; Cohen, G. (2006) 'The Creativity and Aging Study: The impact of professionally conducted cultural programs on older adults'. National Endowment for the Arts. Also available from <http://www.nea.gov/resources/accessibility/CnA-Rep4-30-06.pdf> [last accessed 30/9/11].

¹⁷ See e.g. Clift, S., Hancox, G., Staricoff, R., & Whitmore, C. (2008). A systematic mapping and review of non-clinical research on singing and health. Sidney De Haan Research Centre for Arts and Health, Canterbury: Canterbury Christ Church University.; Kreutz, G., Bongard, S., Rohrmann, S., Hodapp, V. & Grebe, D. (2004) Effects of Choir Singing or Listening on Secretory Immunoglobulin A, Cortisol, and Emotional State'. *Journal of Behavioral Medicine*, 27 (6), 623-635.

social, intellectual¹⁸, emotional, personal and interpersonal skills that children develop through direct involvement in musical activity. Furthermore, they include the intrinsic musical benefits that such study brings.

The benefits of active music making extend beyond the individual into the wider family and the local community, e.g. through improvements in the ability to access a broad range of culture and feel part of a community¹⁹.

In order to consider new ways of delivering music education in Wales, an understanding of existing provision and key developmental needs is required. The following subsections therefore review some of the key drivers of change in the provision of music education in Wales.

3.1 Need for Consistency

Consistency of outcomes is a key theme in the work of the Task and Finish Group and the National Assembly Committee inquiry, as well as in the stakeholder research undertaken for this study. A number of aspects are of particular relevance for the consideration of options with which to improve provision. These include most notably whether and how greater consistency would deliver benefits in terms of:

- the structure and governance of music education;
- the approach to charging fees for Music Education Services;
- the cost of provision;
- ensuring the sustainable availability of a music education workforce.

Structure and governance

The coordinating body for local authority Music Services — Cymdeithas Addysg Gerdd Awdurdodau Cymru/Welsh Authorities Music Education Association (CAGAC) — is a key forum for the consideration of existing structures for Music Education Services in Wales. This body reports to ADEW (Association of Education Directors in Wales).

We spoke to CAGAC as a group and to individual Heads of Music Services and received detailed submissions from 14 of the 15 Heads of Music Services in Wales. Furthermore, we undertook face-to-face or telephone interviews with 11 of these Heads of Music Services, as well as an in-depth interview with the Denbighshire Music Co-operative, which covers Denbigh and Wrexham. This means that we have gathered the views of stakeholders delivering Music Services, covering delivery in 21 of the 22 local authority areas in Wales.

The views that we gathered indicate that the governance and structures that underpin the provision of Music Services in Wales are regarded as a system in a state of flux:

- Two local authorities had no Heads of Music Services at the time of the survey, and two of those whom we interviewed, including the head of a charity (Gwasanaeth Ysgolion William Mathias, covering Anglesey and Gwynedd), have since left and are not currently

¹⁸ Hetland, L. (2000). Learning to make music enhances spatial reasoning. *Journal of Aesthetic Education*, 179-238.

¹⁹ See e.g. Broh, B. (2002). Linking extracurricular programming to academic achievement: who benefits and why? *Sociology of Education*, 69-95.; Davidson, J., & Good, J. (2002). Social and musical co-ordination between members of a string quartet: An exploratory study. *Psychology of Music*, 30(2), 186.

being replaced. This leaves five local authorities without Heads of Music Services at present.

- Some of those Heads of Music Services currently in place have other departmental responsibilities in their Education Departments. Meanwhile, some are also music tutors.
- Powys, Wrexham and Denbighshire have no local authority Music Service, although Powys still has a local authority officer who is responsible for music education.
- South Powys Youth Music Charity and North Powys Brass Band provide musical experiences but not a comprehensive Music Service.
- Staff formerly employed by the Music Services in Denbighshire and Wrexham have formed separate co-operatives to offer such services. At present they share a Chief Executive.
- Gwent Music provides a Music Service for Torfaen, Newport, Monmouth, and Blaenau Gwent, although financial contributions from these authorities are dwindling.
- The Cardiff County and Vale of Glamorgan Music Service is run by Cardiff Council on a break-even basis. Nearly half of the schools use CAVMS Ltd., which is a private company.

Some members of CAGAC were concerned about releasing what they considered to be commercially sensitive information which could be used by their competitors. We have accordingly anonymised the majority of the data, including any quotes, with the exception of Table 2, which gives an overview of the general situation in Wales.

There were significant delays in receiving information that we requested and it became apparent as we received information from local authorities that there is variation in the nature of, and the methods for, how data is recorded. This is a consequence of the non-statutory nature of the service. Until the Task and Finish Group drew up its proposed terms of reference (see Appendix 1), there was no common agreement as to what each service should provide. There are no common KPIs. This means that even though the services are providing similar services, the outputs and outcomes are not recorded in consistent ways.

It is perhaps unsurprising, then, that there is no consistent collection by the local authority Music Services of pupil numbers, the length of lessons, and whether lessons are in the form of groups or delivered on a one-to-one basis. This is principally because their service-level agreements with schools are based on the teacher time supplied, not the outputs generated. Additionally, they often leave recordkeeping of pupils' details to the schools and, therefore, have little information on their home addresses or other circumstances. Given the limited data gathered from schools in this study, it is not possible to assess what records they are keeping themselves. As a consequence, there is only limited information available on the uptake of lessons by eFSM learners for this study.

Schools report upon their use of the Pupil Development Grant; however, there appears to be no specific requirement to report upon how much is spent on Music Services. Any data is kept at the school level. The evaluation in 2017 does not mention music, but that does not mean that the PDG is not being used for Music Services²⁰.

²⁰ [Evaluation of the Pupil Deprivation Grant](#)

There is no obligation for schools to report upon the numbers of pupils receiving music lessons or where they are receiving them. Schools will be aware of lessons during school hours but may not know of private lessons being arranged by parents/guardians.

Table 2. Governance and management of the Music Services in Wales

Music Service	Head of Service as of 01/08/19	Total number of Pupils in the area covered by the Service	Governance of Music Service Overall Provider	Friends Charity?
Bridgend Music Service	Yes	22,935	Education Department	Friends of Bridgend Youth Music
Caerphilly Music Service	Yes	28,408	Education Department (School Improvement)	No
Cardiff & Vale Music Service	Yes	77,212	Cardiff Education Department	No overall Friends, but two ensembles have friends
Carmarthenshire Music Service	Yes	27,265	Education Department	No
Ceredigion Music Service	Yes	9,583	Education Department	Friends Charity
Conwy Music Service	No	15,802	Education Department, Expressive Arts	Friends Group (not a charity)
Denbigh	No	15,598	No local authority Music Service; Denbighshire Co-operative provide an independent Music Service	-
Flintshire Music Service	Yes	23,395	Education Department	Friends Charity
Gwent Music Support Service (Newport, Blaenau Gwent, Monmouth, Torfaen)	Yes	61,754	Newport Education Department + joint committee of five LAs (incl. Caerphilly)	Friends Charity plus local Friends groups
Gwynedd & Anglesey	No	26,713	Gwasanaeth Ysgolion William Mathias; CLG Charity	Music service is a charity
Merthyr Music Service	Yes	8,915	Education Department (Inclusion)	Friends of Merthyr Tydfil Youth Music
Neath Port Talbot Music Service	Yes	20,929	Education Department	Friends of West Glam Music + Cerdd NPT Music
Pembrokeshire County Council Music Service	Yes	17,349	Education Department (Sport Development)	Friends of Pembrokeshire Young Musicians
Powys Music	No	17,207	No local authority Music Service; schools buy in private tutors; a few buy in NPT Music Service	South Powys Youth Music, and North Powys Brass Band
Rhondda Cynon Taf Music Service	Yes	38,635	Education Department	Friends of RCT Youth Music
Swansea Music Service	Yes	35,846	Education Department	Friends of West Glam Music
Wrexham	No	19,566	No local authority Music Service; Denbighshire Co-operative provide an independent Music Service	-
Total		467,112		

Heads of Music Services self-report that the proportion of schools using the local-authority-funded service, where it exists, varies considerably from one local authority to another and ranges from as low as 45% up to 98%, with an estimated average of 83% across Wales.

The mixed economy is further underlined in that local authority Music Services themselves operate outside of their own boundaries. For example, we discovered a secondary school which went out to tender for Music Services and awarded the contract to the Music Services of a neighbouring authority. We were told of several schools which prefer to use neighbouring local authorities' services rather than those of their own, for whatever reason.

Charging

Of the LAs who provided data, charges to parents vary from zero for all Music Services on offer to a maximum of £216 per term for tuition (typically £30 to £60), plus an additional cost for participation in the ensembles (up to £62 per term). The following table shows the variation between authorities.

Table 3. Charges to schools and parents (where figures are available)

Type of Authority	SLA Fees/Hour Lower Rate	SLA Fees/Hour Higher Rate	Charge to Parents per Term	LA Annual Funding per School Pupil
Urban	£37.23	£37.23	Lessons and instrument hire generally free	£25.56
Urban	£17.00	£22.67	Charges set by school-	£17.60
Urban	£38.00	£40.00	Group lessons £55; individual 30-min lessons £216	£0.00
Urban	£30.00	£32.00	All lessons are free	£10.77
Urban	£28.50	£37.00	£20 per term	£7.64
Urban	£29.70	£42.40	£100 plus instrument hire £13	£3.34
Urban	£40.40	£60.00	£20.00 per term	£1.20
Mixed	£34.42	£34.42	£130 to £195 per term	£3.73
Rural			Instrument hire £10 per term	£0.00
Rural	£42.50	£42.50	Charges set by schools	£2.70
Rural	£53.20	£53.20	At schools' discretion; maintenance of instruments £8	£0.00
Rural	£36.00	£36.00	Charges set by schools	£3.80
Rural	£57.00	£57.00	Small-group lessons £195	£0.00
Rural	£46.50	£46.50	Charges set by schools	£9.22
Rural			Average £72, but varies at schools' discretion	£0.00

Charges to schools from the Music Service vary from £22.67 to £57.00 per hour and are agreed via service-level agreements. The SLA fees charged to schools tend to be higher where the LA contribution is lower. However, this is complicated by the charging policy for ensembles and instrument hire. Where these additional costs are lower, this places additional pressure upon the main Music Service budget and, therefore, has to be recovered by the service via higher SLA fees.

Moreover, the available data shows that there tends to be an increase in SLA charges with increased rurality of the LA. This may be because of the greater distances between schools, which means not only higher transportation costs, but also that fewer lessons are possible for each tutor because of the travelling time. We would expect this to have some impact upon both the take-up rate of the LA service by schools and the level of charges subsequently passed to parents by the schools. Heads of Music Services stated that schools often try to keep these charges to parents as low as possible by timetabling short lessons. Regular weekly one-to-one lessons for pupils can be as short as 10 minutes.

In the majority of local authorities, there are additional charges for pupils participating in the various ensembles. In many local authorities these are offset to a degree by support from the 'Friends of ...' charity. Whilst the majority of services provide a varied and comprehensive range of local authority ensembles, they also participate in joint arrangements which provide cross-local-authority and national ensembles. Typical charges to parents/guardians for the local authority ensembles vary from £42 per term for choirs to £62 per term for senior ensembles. Additional costs to parents may include the purchase or hire of better-quality instruments and transportation to events. As a general rule, Heads of Music Services reported that schools do not make contributions to ensemble costs, which tend to be wholly funded by parents/guardians. This is where 'Friends of....' charities play a role in helping families with lower incomes.

Cost of the service

Assessing the total costs of the service across Wales is complicated, given the availability of data. Not all of the LAs we spoke with provided details of the breakdown of funding and/or costs. Therefore, the data discussed here needs to be viewed as incomplete and should not be considered fully representative, but can give an understanding of some of the issues being faced by Music Services. When trying to further drill down into the figures available in order to examine the cost per pupil or the cost of services being delivered, there is further complication because of the lack of monitoring data.

In the majority of cases this local authority contribution is paid to the Music Service; however, in some local authorities it is now paid directly to the schools, who are then able to use it to pay for the local authority service via a service-level agreement or to buy in outside organisations or freelancers.

In general, the local authority contribution pays for central staffing of the local authority Music Service, as well as for a proportion of the cost of ensembles. Schools and parent/guardian fees cover the balance.

The remainder of the costs of Music Services are composed of charges to schools under service-level agreements, most of whom pass at least part of the costs to parents/guardians, with any shortfall being covered by schools' own delegated budget.

In at least one local authority area, the service is designed to be self-funding with no local authority contribution. In other words, fees from parents/guardians and schools are set to pay for the provision and the central Music Service.

Although there is no monitoring data being gathered in order to assess the validity of the claim, a number of Heads of Music Services were of the opinion that there were differing levels of take-up by schools in the more affluent and less affluent areas. However, the number of pupils being taught, the hours being taught per pupil, and the number and length of lessons are not being consistently recorded by the services; therefore, a full analysis is not possible. In the majority of cases this data is held only by the schools.

Two local authorities have a policy according to which the service is free at the point of delivery, but there is not enough evidence to show whether or not this improves the take-up by pupils who are eFSM. However, what is clear, from discussions with Heads of Music Services and headteachers, is that they are of the opinion that the proportion of eFSM pupils receiving music lessons is considerably lower than the overall proportion of eFSM pupils in the local authority. Some Heads of Music Services suggested that this may be due to a number of factors including parental attitude, space in which to practise at home, and other costs such as transportation, which the provision of free lessons cannot address.

A sustainable workforce

Our discussions with stakeholders show that there is huge concern among stakeholders and CAGAC with respect to the sustainability of the music tutor workforce. Terms and conditions of employment have been steadily eroded over the years, which is having an impact upon the recruitment and retention of staff. Several stakeholders were pessimistic towards the long-term sustainability of the workforce.

The nature of employment and the terms and conditions of employment for music tutors vary considerably, even within local authority Music Services, which may see some tutors being on a salaried contract and some self-employed. According to Heads of Music Services, up to 20 years ago the dominant model appears to have been one in which all of the Music Services employed staff with a Qualified Teacher Status, but now relatively few do so.

Tutors are usually contracted on a termly basis for a set number of hours at a number of schools. This applies not only to local authority services but also in co-operative and private providers. The attraction of a flexible contract or the self-employment model for the music service is that the demand for tuition fluctuates, as learners start enthusiastically but may then lose interest over time. On the other hand, each year there are fresh learners. For a tutor, there is little stability because hours and earnings can change annually or even termly. This also applies to self-employed tutors.

A view given at the meeting held between the study team and CAGAC members suitably summarises the dilemma that arises:

‘Most schools only buy in 30–34 weeks of Music Services (instead of 39) and freelance teachers aren’t paid in between. At the same time, where teachers are still employed, if schools terminate a certain instrument halfway through the term,

the Music Service can't terminate the teacher's contract so that the subsidy then goes to paying the teacher for the rest of the term.'

CAGAC members reported: 'Music Services can't currently use qualifications as a condition of employment, because recruitment is difficult enough as it is. There is also no qualification that is fit for purpose.' Moreover, they highlighted that 'colleges don't equip students well for a career in teaching. [The Royal Welsh College of Music and Drama] are also having difficulties in recruitment, because the career as such is losing value.'

Table 4 examines how music tutors are employed by services from whom the information that we requested was received. Heads of Music Services report that music provision is delivered by a mix of qualified and unqualified teachers, which varies from 4% to 60% qualified staff, but not all pay accordingly. Some services pay the rate of unqualified teachers to everyone. Meanwhile, some services pay a lower rate than the NJC scales. The most common pay scale used is the rate of unqualified teachers, with the highest point being point 6 on the scale, which is currently £27,216²¹ per annum (or £21.51 per hour²²).

Table 4. Employment status of tutors

Type of Authority	Staff PAYE (FTE)	Staff Casuals	Qualified Teachers	Pay Scale	Recruitment & Retention
Urban	14.8	0	33%	Unqualified Scale 3	Poor
Urban	20	0	4%	Unqualified Scale 3	Satisfactory
Urban	21	0	39%	Qualified and Unqualified	Poor
Urban	18	3	28%	Qualified and Unqualified	Poor
Urban	4.5	0	36%	Unqualified	Poor
Urban	0	41	60%	Self-Employed	Good
Urban	15.8	0	33%	Unqualified Scale 6	Satisfactory
Urban	40	2		Qualified Scale 5	Satisfactory
Mixed	6.8	107	19%	Employed Scales 5–6	Satisfactory
Rural	21	0	60%	Qualified and Unqualified	Satisfactory
Rural	10	0	20%	Unqualified	Poor
Rural	11.4	0	20%	Qualified Scale 5	Poor
Rural	14	14	50%	Qualified Scale 1 and Unqualified Scale 1	Poor
Rural	0	41	60%	Self-Employed	Good
Rural	0	54	13%	Self-Employed	Varies by instrument

Heads of Music Services were asked for their views on their experience of the recruitment and retention of tutors, with the majority of LA Heads of Music Services reporting this to be satisfactory at best or poor. All of those services that pay at the 'scale point 6' rate or above report that their recruitment and retention are satisfactory or good, whilst the majority of those which pay at lower rates reported them to be poor, with some reporting satisfactory. A few reported that retention was difficult because many newly qualified musicians would join the service for a year or two before either developing a full- or part-time music career

²¹ [NEU Pay Scales 2018-19](#)

²² [NUT Directed Time Card](#)

elsewhere or leaving music altogether. Only the co-operatives reported recruitment and retention to be good.

This impression obtained from the stakeholder interviews is borne out by research undertaken by the Musicians' Union in England: '[Poor pay and conditions] lead to job dissatisfaction and insecurity, resulting in a high turnover of teachers, which, in turn, impacts on continuity of learning and the ability of hubs/Music Services to provide a broad programme of activities.'²³

The status of music education as a career is a particular concern. Because there is no statutory framework for local authority Music Services or other providers, they are not formally inspected by Estyn. The quality of music teaching and learning is considered in Estyn school inspections, as is the quality of teaching and learning in all subjects. However, music tuition as a discipline is not examined in school inspections and Music Services are not included in local authority inspections.

There are no minimum qualification levels required of music tutors, although in practice, many of them have music degrees and postgraduate teaching qualifications. There are qualifications available for music tutoring, which, since it is often delivered on a one-to-one basis, requires techniques that are different from those in class teaching.

Against the backdrop of challenges to recruitment, many Heads of Music Services expressed concerns surrounding the age profile of their tutors. Heads of Music Services are concerned that music tutoring is not seen as a career, but for the majority of graduates it is a stopgap until they can find something better; therefore, new younger staff tend to move on fairly rapidly.

3.2 Addressing Financial Pressures

A fundamental issue which emerged from the discussion that we held with stakeholders throughout the system was, perhaps unsurprisingly, the funding available for the provision of Music Services. This not only is the case in Wales but also is a feature of the wider debate surrounding music education in the UK. A review of the National Plan for Music in England, wherein the government has introduced a number of 'hubs' to coordinate music provision, summarised this underlying challenge as follows:

'Hubs have to demonstrate a successful working business model. Lead hub finances shape employment and business practices, set trading prices and fundamentally raise a key frustration: with a finite amount of money, what level of musical breadth and depth of opportunity and experiences can hubs truly offer to the 8.2 million children and young people between the ages of five and 18 in England?'²⁴

²³ [Musicians Union 2017 Education Report](#)

²⁴ The UK Association of Music Education – Music Mark (2018), The Future of the National Plan for Music Education

In Wales, with music education being the responsibility of local authorities, the considerable budgetary pressures that they have experienced in recent years are of particular concern. This was very clearly expressed in a meeting held with CAGAC members for this study. We heard views suggesting that ‘the Task and Finish Group report called for standardisation across LAs, but because funding subsequently diminished, this wasn’t achieved’.

Participants in the meeting raised serious concerns: ‘Music Services are nearing a ‘tipping point’ regarding cuts.’ They described

‘potent cocktail of being under constant threat of restructuring (e.g. introduction of zero-hour contracts), decreasing numbers of schools offering GCSE and A-Level in music (in favour of expressive arts), music education increasingly being pitted against/replaced by ‘musical experiences’, and inadequate leadership and support’ (CAGAC meeting).

This same concern is reflected in a debate surrounding music tuition in schools which was held in the Scottish Parliament in April 2019, which suggested that:

‘one of the biggest worries for the [Education and Skills] Committee is the fact that some councils see music tuition as a relatively easy target for budget cuts and as a means of generating additional income, perhaps to subsidise other school services. I think that we all feel distinctly uncomfortable about that.’²⁵

Other national organisations with a role in contributing to music education in Wales are equally aware of the fundamental issue of a lack of funding, with one commenting that ‘the provision of Music Services is ‘an absolute struggle in Wales’, with Music Services ‘feeling beleaguered’, and another quoting the example of additional money for ensembles that ‘was supposed to come from local authorities, but this wasn’t forthcoming’.

3.3 Musical Experiences, Music Education and Music Teaching

A key concern that pervades stakeholders’ considerations, and is evident in the wider research literature regarding the provision of music education, relates to the question of how different types of provision can best complement one another in order to ensure that children are motivated to engage in music education and able to acquire the necessary skills. Three main types of provision can broadly be distinguished:

- **Musical Experiences** are usually short-term interventions that immerse whole classes (or sometimes even the whole school) in a short-term activity related to music. These can be valuable in kindling an interest in music in general or encouraging a learner to take up learning instruments in the longer term.
- **Music Education or Tuition** is concerned with the long-term commitment to learning how to actively make music, e.g. playing an instrument well, or voice training. This

Music Mark membership includes 95% of the Music Education Hubs, over 4,500 schools, key music educationalists, a growing number of national and regional music education organisations, corporate music companies and the wider sector.

²⁵ [Scottish Government Debate Transcript: Music Tuition in Schools 30th April 2019](#)

can take years, in respect of building up expertise, and can include progression through the stages of graded examinations.

- **Music Teaching**, which concerns the provision of a range of basic musical skills in schools, is governed by the curriculum and needs to be provided in schools.

Musical experiences

The findings from the stakeholder interviews suggest that musical experiences are attractive to headteachers because they are easy to plan and budget for. Musical experiences are particularly popular in primary schools, who are unlikely to have a music specialist on their staff. A further attraction is that there are local and national charities able to use grant funding to provide free musical experiences, particularly in schools serving areas of disadvantage.

As budgets have been reduced in recent years, some local authority Heads of Music Services, in considering more affordable ways in which to deliver music teaching as widely as possible, have themselves increased the amount of effort that they put into providing musical experiences as opposed to long-term tuition. These include short tasters on 'standard' instruments but can increasingly include an emphasis upon others such as samba drums, electronic music, group singing, and guitar. They are generally conducted in large groups, so there is little opportunity for individual coaching, but are attractive to schools seeking a lower-cost musical experience.

Several national organisations in Wales also deliver projects or programmes offering musical experiences. A five-year Welsh National Opera school programme, for instance, represented a 'considerable investment' from the Jane Hodge Foundation, who have an interest in diversifying the talent pipeline. Similarly, the BBC National Orchestra of Wales, as part of its remit for community outreach, regularly delivers community projects for stimulating interest in and enjoyment of music. A recent project working with local authority Music Services across North Wales, for instance, reached 1,600 children. This work is accompanied by a recognition that these types of initiatives 'need to work through some kind of hub infrastructure' and that 'we cannot engage with all children' (BBC NOW).

However, there were some concerns surrounding musical experiences identified through the research.

Firstly, there was seen to be a risk that musical experiences may come to replace more in-depth offers, rather than being offered as an entry point — a series of short-term experiences as part of the music curriculum being seen as a substitute for long-term instrument tuition.

Secondly, Heads of Music Services and other stakeholders highlighted the practice of private companies being contracted to provide cover for Preparation, Planning and Assessment (PPA) — the statutory time allocated to all teachers, particularly in primary schools. The potential issues here are noted in evidence arising from England.

Representatives of Music Hubs in England included in the Music Mark report were of the opinion (specifically in relation to whole-class ensemble teaching) that it 'has become PPA

cover, rather than schools being on board with what we are trying to achieve. What is our role?' Furthermore, my 'most frustrating experience as a teacher of music has been meeting new pupils who have no enthusiasm to pursue instrumental tuition when it is offered because their wider opportunities experience has put them off'.²⁶

Thirdly, there is concern, particularly from CAGAC, that providers often employ enthusiastic, young people, who may be interested in music but have no qualifications in it. It is seen as a good way for young people to gain experience before embarking upon a career in schools as teachers or learning support assistants.

Questions regarding whether and what kind of music experience does indeed create an appropriate entry point for more in-depth engagement with music are reflected in the choices made elsewhere in the UK, too. While in England the solution has been to embed whole-class ensemble teaching in the provision required by all Music Hubs, Scotland has taken a different route.

One of the English Hubs' core role is to 'ensure that every child aged 5-18 has the opportunity to learn a musical instrument (other than voice) through whole-class ensemble teaching programmes for ideally a year (but for a minimum of a term) of weekly tuition on the same instrument'.²⁷

The Scottish example, on the other hand, illustrates how an overarching focus upon continuity and progression led to a different solution to integrating services designed to reach every child with more in-depth offers for those who wish to pursue music further. Going beyond projects or programmes delivering musical experiences that tend to focus upon relatively short-term interventions, the Youth Music Initiative offers a targeted fund for delivering the Scottish Government's commitment for every school pupil in Scotland to be offered a year of free music tuition by the time they leave primary school²⁸.

Music education/tuition

Music education or tuition with respect to instruments is the core building block of the current Music Education Services in Wales. This is currently undertaken initially through small groups, typically of two, three or four pupils or in the form of one-to-one tuition. As outlined previously in this report, the focus of previous work upon the provision of music education in Wales has rested upon finding ways in which to make the availability of instrument tuition more equitable in Wales.

This has related both to working towards a more consistent offer of tuition in different instruments and to introducing greater coherence and a standardisation of the ways in which the costs of such tuition are paid for, i.e. by parents or through public subsidies. Alongside this, the interface with regional and national ensembles in order to enable

²⁶ Music Mark (2018), The Future of the National Plan for Music Education, A Report on the Consultation of Music Mark members.

²⁷ Fautley M & Whittaker A (2018), Key Data on Music Education Hubs 2017.

²⁸ Creative Scotland (2018), YMI Annual Plan 2018-19.

progression with respect to the 'Welsh pyramid' has been a focus of attention. Stakeholders talked about the need to identify talented musicians at an early age and then nurture them.

For instance, the integration of local school-based provision with progression routes to both the regional and the national level, which is often referred to as the pyramid system, has been a focus of attention. The need for a solid link into local music tuition continues to be recognised by key stakeholders: 'Recruitment for the national orchestra needs to go through local providers working with schools, because for a 120-strong orchestra their support is needed.' (CAGAC stakeholder)

In the past, however, this has been available only where the local authority runs the Music Service. Several interviewees referred to this issue, stating that in the past, learners who received only private lessons were denied access to ensembles, which were reserved only for learners who participated in the local authority Music Service. Consequently, many Heads of Music Services expressed concerns surrounding the introduction of service delivery by co-operatives, non-profit organisations or the commercial sector. However, developments in Gwynedd and Ynys Mon, wherein the service is run by a charity on a contract from the two local authorities which includes them running the ensembles, and in which schools are sourcing services from a non-governmental body, show that alternative ways of integrating different types of music education are feasible.

Similarly, changes to the way in which National Youth Arts Wales themselves are working to extend their reach into different settings in order to identify talent illustrate a shifting landscape of music education: 'Recruitment for some national offers is now wider through the youth sector as a whole.' (National arts charity)

Taken together, the stakeholder interviews undertaken for this study suggest that there is a more fundamental challenge to the way in which music education is currently framed and delivered. One stakeholder summarised this, stating that 'the crisis is more nuanced in terms of what types of art are available for young people and what routes exist into different instruments and artforms'. (National music charity)

The challenge to the current ways of thinking about music education/tuition amounts to a questioning of the very outcomes that need to be achieved in order to deliver upon policy objectives for music education in Wales. One stakeholder outlined this, stating that 'different approaches can be used to achieve diversity, from offering rock and pop to inviting different abilities into orchestras. Yes, less young people are learning an instrument, but schools are exploring creativity in other ways.' This emerging creativity in schools is covered later in this report. (National arts charity)

This echoes current academic research and sectoral interest elsewhere, too. The issue of how music education can go beyond what is often seen to be an elitist space is one aspect of this fundamental debate that is required to arrive at conclusions regarding the most appropriate provision. This is epitomised in the University of Sydney's work regarding The Place of Music in 21st Century Education (and the associated MOOC Course²⁹). Putting out

²⁹ [University of Sydney - The Place of Music in 21st Century Education](#)

a challenge to the sector as a whole, the lead academic for this project suggests that ‘to succeed in music, you must train the Western art music way, producing another generation of musicians with similar values and worldviews about what’s important in music education. Effectively and possibly not deliberately, we’ve created a music education system, not for every student, but for a tiny minority that can perpetuate it.’³⁰

Music teaching

Musical experiences and music education/tuition are delivered alongside schools’ own curriculum-based provision of music teaching and are expected to complement these in ensuring a rounded music education. In primary schools, music teaching tends to depend upon the musical expertise of staff. Secondary schools usually have one or more specialist music teachers; increasingly, however, there has been a move to create Expressive Arts Departments. This is reflected in the Expressive Arts Area of the Curriculum for Wales, which encompasses music, dance, drama, art, film, and digital media. It is too early to consider whether and how the new curriculum will strengthen the status of music in schools, but there has been a declining trend over the last decade or so in respect of pupils choosing music as a subject: entry numbers for GCSE Music in 2008/9 were 3,368 compared with 2,138 in 2017/18; the figures for A-Level Music were 575 in 2008/9 compared with 271 in 2017/18³¹.

Evidence from the experience in England suggests that one key element of successfully combining curriculum-based music teaching with music education is concerned with the link and precise focus and function of each of these needing to be clear. The National Plan for Music Education (NPME) (England) shows that without clarity there is a risk that schools will become too dependent upon Music Education Services for curriculum-related provision, too. ‘The NPME needs to be clarified in relation to the [National Curriculum] for Music, this would be helped by a more clearly defined content in the National Curriculum for Music. Sometimes expressed as ‘too woolly’. [...] The NPME should lay out what good music provision in schools should look like.’³²

The situation in Wales is different in that the importance of music in schools has been recognised in the introduction of the new curriculum. However, ensuring that schools take responsibility for curriculum-based provision will, nevertheless, be important in making a new model for music education in Wales work. This challenge is reflected in the findings from the Music Mark consultation which found that English Music Hubs often struggle to engage schools in an appropriate way without the latter yielding responsibility for the subject as a whole to external providers. ‘Schools are responsible for their curriculum and always

³⁰ Humberstone J (2018), The Place of Music in 21st Century Education lectures: Introduction to Module.

³¹ [StatsWales: GCSE entries and results by subject group](#)

³² Music Mark (2018), The Future of the National Plan for Music Education, A Report on the Consultation of Music Mark members. Music Mark membership includes 95% of the Music Education Hubs, over 4,500 schools, key music educationalists, a growing number of national and regional music education organisations, corporate music companies and the wider sector.

should be. [...] It is perfectly possible for schools to be leading their school music curriculum and be supported by their Music Education Hub.’³³

This is in line with recommendations from an early Ofsted report on the effectiveness of Music Hubs, which drew specific attention to the need for hubs to focus their energy and resources upon school engagement. This was seen to be a key way of more firmly establishing music as a valuable subject in school life again, as well as ensuring that music opportunities are accessible to young people³⁴.

A 2019 report by the Music Commission further considered the role of schools in making choices regarding the provision of music education. The report highlights ‘increasing evidence suggesting that those schools that offer a rich music programme achieve better results than those that do not’. Drawing upon the research undertaken for the Music Commission inquiry, the report goes on to suggest that ‘in the coming years, it is essential that school leaders have both incentives and compelling evidence to place music at the heart of their offer to their students and to be able to recruit and develop the specialist and generalist teachers who will enable music to flourish as a key curriculum subject and to support all students to achieve their musical potential’.³⁵ The report outlines that in England the introduction of the EBacc is getting in the way of headteachers placing emphasis upon music education in their schools.

3.4 The Role of Technology

The role of technology in revolutionising the way in which music education is delivered, or indeed how music is made more generally, is similarly highlighted in the literature. ‘Because of the accessibility and immediacy that technology affords, young people have a much more fluid approach to musical tradition and learning. The barriers between genres and styles of learning no longer exist as they used to.’ (Music Commission Report 2019)

The development and use of music technology ‘can vary from developing music instruments, teaching techniques, and music theory methods to computer-based hardware and software. Music technology should be understood as the study of music in relation to its tools and techniques, and by extension, the application of this study in music education to music teaching, learning, and production’ (Music Technology SIG³⁶).

‘The pace at which technology is evolving is rapid. The opportunities technology offers for learning, making and engaging with music are significant and, in our view, currently under-exploited. The current generation of music learners can explore any era or kind of music at any time. Technology allows them to access and to merge ‘musics’ from any culture. It enables the creation of digital spaces and forums and means that learners can improvise

³³ Music Mark (2018), The Future of the National Plan for Music Education, A Report on the Consultation of Music Mark members. Music Mark membership includes 95% of the Music Education Hubs, over 4,500 schools, key music educationalists, a growing number of national and regional music education organisations, corporate music companies and the wider sector.

³⁴ OFSTED (2013) Music in Schools: What hubs must do.

³⁵ Music Commission (2019), Retuning our Ambition for Music Learning, Every Child Taking Music Further.

³⁶ [ISME Music Technology Special Interest Group](#)

together, access virtual teachers and challenge each other via social groups, connecting and building networks for supporting their learning. When new technologies increasingly provide accessible, low-cost means to make music and assess progress; when they provide the tools to share music, collaborate and interact, we believe there should now be a central place for technology in supporting learners' progress in music.

[...] For music education, technology opens up the opportunity to use sound in different ways. It is also providing an increasingly important means for creating music, with coding becoming as important a vehicle as notation for doing so. For young people, therefore, new technology increasingly provides meaningful tools; ones with which they are comfortable and adept that enable their understanding and production of music'³⁷ (Music Commission report, p. 56).

Not only can this be seen at a very basic level with National Youth Arts Wales auditioning via video link, it can also be useful in tackling one of the key challenges associated with the delivery of music lessons, i.e. the costs associated with transportation. Teachers, particularly in rural areas, can spend a lot of their time travelling to and from lessons or be prevented from doing so altogether by poor weather or transportation issues.

A good example of innovative work in this area is the *Connect: Resound* project run by the charity NYMAZ and the University of Hull in North Yorkshire³⁸. In 2018, a pilot project was undertaken with North Yorkshire Music Service. It explored how teachers could deliver instrumental music lessons via free internet communication software such as Skype, using live video streaming comprising a multi-camera system and high-quality microphones.

In 2019, as an extension of the project, pupils in remote locations across the whole of England are participating in music lessons delivered online by Music Hub staff. To quote UCan Play³⁹, which is the not-for-profit company facilitating this work:

'From a secondary school three hundred metres above sea level in Cumbria, to a multisite primary school on the Isles of Scilly, the Connect: Resound project is enabling hundreds of pupils to benefit from instrumental lessons that they would have not been able to receive using conventional face-to-face tuition. For example, pupils on the Isles of Scilly are working with Cornwall Music Hub to learn a variety of instruments, and collaborate with each other to build a band, from scratch, with the support of a music teacher based in Cornwall. Transport issues are a particular challenge here, with boat and plane access to the Islands often hampered by bad weather, especially in winter. At the other end of the country, live lessons are being streamed into Alston and Nenthead primary schools in Northern Cumbria. Durham and Darlington Music Education Hub covers a large and diverse area, including

³⁷ [Performing online: Approaches to teaching performance studies in higher education within a fully online environment](#) *Australian Journal of Music Education* 51(1):63 · December 2017

³⁸ [North Yorkshire Music Action Zone](#)

³⁹ [UCan Play](#)

many remote and rural communities, and will teach brass and strings to schools in the west of the region including Esh Primary School. Pupils at Burstwick Primary School in the East Riding of Yorkshire are learning the xylophone, percussion and the violin from teachers based 20 miles away in Beverley.'

'Although there are many benefits of teaching musical instruments online, not least the potential cost savings, no-one on the Connect: Resound project suggests that it is the same as having a teacher physically present in the same room as their student. A blended model, with teachers physically visiting the school once a term with the remainder of the lessons being delivered online, has been shown to be particularly helpful. The online experience can be very powerful in and of itself, and we have been constantly impressed by the ingenuity and creativity by which teachers and students adapt to this new style of teaching and learning.'

There is obvious potential here in a Welsh context.

3.5 Summary

The stakeholder interviews revealed an ongoing debate surrounding the shape of the most appropriate music education in terms of content, teaching approaches and the range of outcomes to be achieved. Rather than prescribing a limited set of offers, the creation of a new delivery model in Wales is therefore seen as an opportunity to put in place processes and systems that can provide the flexibility for an evolving set of offers.

Developing a new delivery model for music education in Wales will therefore need to go beyond a reorganisation of how music tuition is delivered and paid for. Instead, it will need to draw upon an overarching understanding of how the whole range of different offers can complement one another so that music is accessible for children and young people in line with their ability and preferences.

Reaching decision makers at the school level and engaging them in this debate will be vital in strengthening music education in Wales.

Based upon this conclusion, the remainder of this report will present headline findings of current delivery practices in local authority areas throughout Wales and identify key players in the existing market for Music Services in Wales, before considering the potential nature and role of a National Plan for Music Education and the options for a new delivery model.

4 Alternative Models of Delivery

The brief asked for specific consideration of alternative delivery models (ADMs) for Music Services.

Local authorities have been outsourcing specific activities for many years. For example, many leisure centres are now run by charities, such as the LC2 in Swansea and Legacy Leisure in the Vale of Glamorgan, as well as social enterprises, such as Celtic Leisure in Neath Port Talbot and Halo in Bridgend. Some local authorities have set up new charities to take over other services, such as the Awen Trust in Bridgend (which now runs arts venues,

libraries, country parks and community centres in Bridgend). This has continued with charities providing services in social care and running day centres for people with disabilities.

Gwasanaeth Ysgolion William Mathias, which is a charity, has successfully delivered a Music Service in Anglesey and Gwynedd for many years with funding from both local authorities.

As well as the initiative deriving from local authorities, there are examples of charities and social enterprises being set up in order to maintain services which the local authority no longer wishes to fund. For example, communities throughout Wales are taking over libraries, often working in partnership with local authorities. There are further examples in the Vale of Glamorgan in Dinas Powys, and at Cymmer in the Afan Valley. These are charities run by volunteers.

Denbighshire Music Co-operative was founded in 2015 by music tutors who had been made redundant when the local authority closed its service. They elected to form a worker co-operative rather than a charity. A similar situation occurred in 1993 when South Glamorgan Music Service made major changes to the terms and conditions of music tutors. In this case, music tutors created CAVMS Ltd. (Cardiff and Vale Music Service) as a private company, which now provides Music Services to nearly half of the schools in Cardiff and the Vale, as well as schools in Rhondda Cynon Taf, Caerphilly, and Newport.

It is important to note the distinction between:

- Local authorities contracting for services that they formerly handled with their own staff
- Social businesses effectively set up by local authorities for outsourcing purposes
- Social businesses set up as a response to the removal of a service in order to maintain it.

Free advice and support are available from Social Business Wales⁴⁰, which is part of the Welsh Government's business support network.

There are a number of different governance models available, including charities, co-operatives, community interest companies, and community benefit societies, all of which could be used for Music Services. The choice of model is determined by what the organisation wishes to do, and perhaps by how it is to be funded. For example, charities may well be able to access tax-effective giving from the general public and be eligible to apply to charitable trusts more easily. Worker co-operatives are democratically led by their members.

4.1 Case Study: Denbighshire Music Co-operative

This case study of Denbighshire Music Co-operative is presented in some detail for two purposes:

⁴⁰ [Social Business Wales](#)

- It shows how a Music Service operates, and indicates the types of services provided and how they are organised and run on a daily basis. Its services are very similar to those provided by many local authority Music Services. It uses self-employed music tutors, who have a significant say in how the business is run.
- It also shows how an alternative delivery model (in this case, a co-operative) can deliver a music service to schools and parents which is comparable to that provided by a local authority Music Service.

The co-operative was formed in 2015 because the local authority decided to withdraw from Music Services provision, and former employees of the service wished to see a continuation of Music Services.

Structure

Denbighshire Music Co-operative (DMC) is based on the Consortia model, wherein the co-operative (a legal entity in the form of a limited company) provides a range of 'paid-for' services to its teacher-members, all of whom are self-employed. They, in turn, own and control the company (in accordance with the articles of association) and elect a Board of Directors to represent the membership and oversee its day-to-day management. The co-operative is led by a full-time, employed Head of Service and Office Manager.

The organisational structure is completely flat. Teacher-members are free to develop and grow the co-operative in whatever way they choose. The key priority lies in providing a service that customers want, at a price that they can afford. The co-operative's viability and success are therefore dependent upon its quality of service, for which all teacher-members are responsible. Teacher-members pay a percentage of their hourly fee to DMC in order to cover administration costs and support services including invoicing, debt control, customer support, professional development, marketing, dispute mediation, and member support.

Responsibility for DMC's strategic direction is delegated to an elected Board of Directors. Membership of the Board (all volunteers) is open to all teacher-members and to those outside of the co-operative who possess suitable experience and knowledge subject to the co-operative's articles of association.

The Board is responsible for:

- determining DMC's mission and purpose
- safeguarding DMC's ethos and values
- strategic planning and business development
- financial reports and projections
- marketing and pricing strategies
- line management of employed staff
- developing policies and procedures⁴¹
- reviewing and upholding the professional code of practice

⁴¹ Including: child protection, data protection, dispute resolution, complaints, membership, equal opportunities, harassment, health and safety, and so on.

- ensuring that DMC has adequate resources
- ensuring that DMC assets are effectively used
- monitoring DMC's services on behalf of teacher-members
- reviewing policies and procedures
- coordinating professional development
- resolving disputes or complaints

The Board meets six times per annum (on average) in order to discuss key issues and monitor performance. An annual general meeting (AGM) is held every September as part of the co-operative's annual CPD (Continuous Personal Development) conference. This includes a detailed report from the Chairman, financial statements prepared by accountants, the election of new or returning Board members, and voting upon key matters.

DMC employs a Head of Service, Office Manager and Admin Assistant. They are responsible for:

- responding to parental or school enquiries/orders
- processing applications and cancellations
- producing invoices, refunds or credit notes
- chasing unpaid invoices
- checking timetables and teacher-member availability
- processing teacher-member invoices
- responding to customer complaints
- maintaining accurate records and accounts
- marketing and public relations
- school visits and liaison
- event management
- teacher-member support
- dispute resolution

The Head of Service is an experienced teacher. This work is considered 'employment' and is subject to the usual tax and NI deductions, pension, holiday pay, etc. The salary is set by the Board of Directors, who are also responsible for monitoring performance.

Coverage

DMC's work is primarily located within two local authority areas: Denbighshire and Wrexham. Within Denbighshire, DMC works with 54 schools (46 primary and eight secondary); meanwhile, within Wrexham the total is 94 (82 primary and 12 secondary). Furthermore, the organisation works in a small number of early years settings, specialist schools and independent schools (the total number is ca. six) within these local authorities. DMC also works in a small number (ca. six) of schools outside of these two local authorities. In terms of the overall impact, DMC is currently working in every school in Denbighshire and 74% of schools within Wrexham. The organisation's work began in Denbighshire and only started in Wrexham during the course of the 2018/19 term. Prior to their involvement,

Wrexham's Music Service was within the provision of the local authority, with all teachers being employed on teachers' pay and conditions.

Provision

The bulk of the work that DMC undertakes comprises instrument lessons in schools and the running of musical ensembles, though it also offers a number of other supplementary services.

Instrument lessons are delivered by teacher-members as solo (individual student), duet (two students) or quartet (four students) lessons. The costs per term are as follows:

Primary schools

- Solo = £87.50/term (for a 15-minute lesson);
- Duet = £60/term (for a 20-minute lesson);
- Quartet = £45/term (for a 30-minute lesson).

DMC estimates that around 50% of lessons offered in primary schools are solo lessons, with 40% being quartets and only 10% duets.

Secondary schools

- £116.70/term for a solo lesson (20-minute lesson). DMC tries to avoid offering duet and quartet lessons within the secondary school environment.

DMC estimates that around 50% of schools in each local authority subsidise the lessons offered to students. The range of subsidy varies from 5% to 70%. Around 30% of students receiving lessons receive free school meals.

DMC receives income directly from schools and parents. Seventy per cent of their income is billed to schools directly; the remainder is to parents, with a small administration charge being directed to the school in order to cover back-office costs and bad debt.

DMC delivers around 4,000 lessons/year in Denbighshire and 3,000/year in Wrexham. These numbers have increased year on year. Lessons in the spring and summer terms are always greater, as schools prepare their students for the Eisteddfod festival.

In addition to the instrument lessons, DMC offers a range of musical ensembles. These include the following: brass band, training orchestra, senior and junior strings, senior and junior choir, percussion ensemble, guitar group, and sign language choir. Participation in an ensemble costs £60/year (or £25/term). There is no fee for eFSM pupils.

DMC has also recently created a new role for an 'accessible music specialist'. This teacher-member works in a range of settings, delivering accessible music education and music therapy with a particular focus upon the use of new technologies such as the Skoog and the Soundbeam.

DMC offers a curricular advice service for schools and provides teachers who can cover the curricular teaching of music when required. Moreover, DMC offers classroom-qualified teachers to its primary schools in a scheme in which schools buy the tutor in for a period of time in order to deliver the musical element of the curriculum during PPA time for school

staff. This has been hugely successful and is especially welcomed in Welsh-language schools, which struggle to find a Welsh-speaking music specialist and often do not have the skillset within their staffing for delivering music.

DMC also runs a summer school called Music Mania with a mixture of music, performing arts, and sports-based activities. The focus upon music, health and well-being has been particularly successful in the last few years. This is promoted to students by individual co-operative members. If an individual teacher-member is able to recruit seven students to the scheme, they receive one week of work (worth ca. £1,000). Conductors on the course receive £1,500. eFSM pupils are able to attend this summer school free of charge — the standard fee for non-FSM pupils is £165.

In particular, musically talented learners, as identified by music tutors and schools, are being supported through new programmes in line with the new curriculum, such as Music and Maths and Additional Composition. Schools can buy into these programmes as one-off activities.

There is some early years provision in ca. 12 locations across both local authorities. This has increased recently with the work of foundation-phase and accessible music specialists who are part of the co-operative. Previously, DMC received a significant grant from the Andrew Lloyd Webber Foundation to help develop its early years provision.

DMC does not market or promote itself as a deliverer of instrumental music lessons for adults. However, it does make its Denbigh premises available to its teacher-members for a nominal fee (£5/hour), should they wish to undertake the teaching of adults there.

Staffing

DMC employs three staff on permanent contracts. These include the Head of Service, the Office Manager and an administrator.

There are 82 self-employed teacher-members within the co-operative. The hourly rates of pay for instrument lessons vary from £22 to £29 per hour, depending on their level of experience. The Head of Service estimated that around 80% of the members are on the £29/hour rate of pay. For the musical ensemble activities, ensemble leaders are paid £35/hour and tutors in attendance are paid £25/hour. There are no members on zero-hour worker contracts.

What is more, the co-operative has specialist teacher-members who teach music in schools (this was described as the provision of 'cover' teachers with musical specialism). Schools often purchase this provision as PPA cover for their teachers. This work is charged from £35/hour. The majority of these teachers are also bilingual. However, the Head of Service mentioned that finding Welsh-speaking teachers with this skillset is very difficult.

In terms of other 'benefits', these rates of pay do not include any holiday pay, and no provision is made for sick pay or travelling time. There is no PPA time for teacher-members. For those teachers undertaking classroom work there is PPA time factored in within the hours at school.

All teacher-members have to attend one annual CPD day and the gala concert of the co-operative, on an unpaid basis, per annum. This attendance requirement is stipulated in the contract that is in place between the co-operative and its teacher-members.

DMC also organises a group of young adults aged 18–21, including some adults with learning difficulties, known as the Coop Crew. This group provides practical help and support with respect to the various musical ensembles and the summer school activities.

In respect of the qualifications held by teacher-members, 60% are qualified teachers. Each year there are two or three newly qualified teachers working within the co-operative. These members start on a lower rate of pay (£22/hour). The £7 difference between this rate of pay and that of their senior colleagues is used to help provide mentoring support for the new staff.

DMC has few challenges in recruiting teacher-members. It regularly receives around three CVs each week from people seeking work. The last time a job was advertised, it received around 30 applications. Word of mouth is regarded as the most effective way of finding new members.

Evaluation and CPD

Each teacher-member is required to keep individual registers and records relating to their own students' progress. There is no fixed or standard format for this. Individual teacher-members can choose to submit their students for entry to the ABRSM, Trinity Guildhall examinations or any other examination board of their own choice. Individual student progress is tracked by DMC against their performance in these examinations. Furthermore, there are instrument-specific guides which outline the key progress that students can make with regard to their instrument in order to help chart their progress prior to or in between these formal examination points.

During each term, reports are completed online for parents and schools regarding each student's progress. The Artistic Lead moderates these reports and undertakes visits biannually so as to observe each member working. This is not a process of performance management. Rather, the Artistic Lead is there to support teacher-members and share best practice.

The main form of CPD constitutes the provision of an annual 'member day'. There are a range of opportunities presented to members on this day, including advice in relation to legal and accountancy issues, teaching unions, examination bodies, safeguarding training, etc. Teacher-members can choose from this range of inputs.

Musical instruments

DMC has a stock of musical instruments of which students are able to make use. These were 'given' to the co-operative as part of the transition package agreed with the local authority. DMC exercises no charge for the hire of musical instruments.

In respect of the opportunity to supply musical instruments in the most cost-effective way, DMC is working (as part of the Association of Independent Music Services) to explore new

models for the supply of musical instruments to organisations and parents/students. As part of these arrangements, there is an opportunity to create a revenue stream that helps to support the organisation in moving forward. Moreover, there is consideration being given to a more structured approach to the Assisted Instrument Purchase Scheme, according to which students can benefit from the purchase of musical instruments excluding VAT (in line with set criteria provided by the HMRC). This procedure also applies in local authority Music Services.

Finances

DMC has a projected annual turnover of £1.35m for the 2019–20 financial year. The turnover for the work in Denbighshire alone constitutes £800k.

Until October 2018, DMC received no funding from the Welsh Government or the local authority. However, both co-operatives received a proportion of the Welsh Government's £1.5m funding for music education — £50k for the work in Denbighshire and £60k for the work in Wrexham. This money can be spent on a range of activities including supporting the progression of students, GCSE/A-Level support, the repair of instruments, engagement with musical ensembles, and supporting access to musical activities for students receiving free school meals.

Additionally, when the local authority council officers in Wrexham decided to remove the Music Service from their provision, a formal agreement was made in order to ensure access to musical activities for eFSM children. With some schools in the local authority having around 60% of their intake eligible for free school meals, this was a significant promise. Thus far, £50k has been given to DMC during this academic year to cover places for around 250 eFSM children's music with respect to accessing weekly instrument lessons. This was allocated on a first-come, first-served basis.

As well as the income coming directly from schools and parents for the provision, the organisation receives occasional grants. The total income from charitable donations, sponsorship, and donations is £30–40k/year on average.

Marketing

DMC makes extensive use of social media including Facebook, Twitter and Instagram. There is a website that is kept up to date with all of the various activities. On all of the printed marketing materials (e.g. posters and flyers) there are QR codes that link to a lesson-booking page on this website.

DMC works hard to ensure that it has a presence in every school's printed and online prospectus and on its parent–teacher association pages. It tries to ensure that posters are located in the reception area of each school. It has utilised advertising on local radio on occasions. The town centre location of the new office in Denbigh has also resulted in walk-ins from the general public.

DMC has commissioned and implemented an innovative, bespoke pupil-reporting software environment that is used by all teacher-members. This online system automatically generates marketing prompts and email content for parents when their child reaches a

certain progression point; for instance, when they pass Grade 3 there is an automatic email sent to the parents which invites their child to attend a summer school or one of the DMC ensembles.

One of the most effective marketing strategies has been the DMC live band — ‘Make Some Noise’. This band is composed of six musicians (vocalist, drummer, bass guitarist, and lead guitarist, plus other instruments, e.g. harp) and it tours around primary schools each September, whereby providing a free 45-minute musical performance for pupils which is targeted at Key Stages 1 and 2. In September 2019, every primary school in both local authorities will host this event within its school.

Conclusion

The stakeholders we spoke to were of the opinion that DMC meets students’ needs for high-quality, affordable group and individual tuition in a range of instruments, as delivered by trained staff. Furthermore, this offer meets the demands made by schools for the provision of music education in their locality. ‘Excellent provision. The school has a partnership with the DMC. The output is outstanding, with learners gaining places at Guildhall and scholarships for music schools/universities’ (Denbighshire secondary school headteacher).

Stakeholders recognised that the offer provides opportunities for progression for students, giving them and their parents advice and support in a targeted way. The opportunities for students to take instrument examinations from two of the major examination boards have been particularly successful. The ABRSM commented very positively upon the nine Grade 8s in the previous year’s examination cycle.

The challenges associated with working with so many schools should not be underestimated. Every school is different in terms of financial circumstances and the associated administrative arrangements. DMC has never implemented a blanket approach to charging and the need to be flexible has been central to its success thus far. Flexible partnership work is central to the success of DMC and will remain so as it seeks to expand.

The co-operative model is working well for DMC. There is no desire to return to local authority control. The Head of Service has a clear vision regarding how the co-operative model could be built upon and extended within a regional approach (i.e. across local authority boundaries). She expressed the view that there is inherent conservatism in the country as a whole with respect to these developments that needs challenging. There are fewer restrictions in the co-operative model and there is room for creativity in terms of the service design and the delivery of specific activities.

4.2 Other Alternative Models

Alongside the co-operative in Denbighshire, the charity Gwasanaeth Ysgolion William Mathias offers a different example of a potential delivery structure for Music Education Services. The charity has successfully delivered a Music Service in Anglesey and Gwynedd for many years with funding from both local authorities.

In addition to these alternative models designed to essentially deliver the same service portfolio as that previously delivered by the local authority Music Service, there are examples of alternative delivery models that seek to offer different combinations of services.

Flintshire Council, for instance, has integrated its Music Service with the Arts Development team and Theatr Clwyd, with all three services now being co-located and having shared line management arrangements and integrated senior management arrangements. The aim is to 'enable the three services to promote themselves as a centre or hub for arts and cultural activity and excellence, and increase the connectivity between planning and development of their work'.⁴²

Considering different structural models is useful in feeding into thinking about how any new delivery model could be set up. Learning from the English Music Hub model, for instance, illustrates the intricacies of designing an appropriate model. A considerable conflict of interest has developed, as Music Hubs are responsible for some service delivery themselves while also overseeing the commissioning of services from other providers.

However, while such structural implications need to be thought through carefully, there is a risk that governance arrangements will receive too much attention at the expense of more fundamental considerations as to the nature of the services that should be provided and how quality and effectiveness can be assured at the point of delivery.

This point is made in the 2015 Task and Finish report, which was written after the formation of Denbighshire Music Co-operative:

'However, alternative models must be suitable for the local area and local partners. The driver should be consistency of outcomes, and this is not necessarily best achieved by commonality of approach. A 'one size fits all' approach is unlikely to meet local/regional requirements and contexts.'⁴³

In other words, it is not the precise model used for actual delivery on the ground that matters. Rather, a government lead for improving the delivery of music education needs to focus upon changes to the framework conditions that govern the delivery of Music Education Services and how outcomes are best delivered. Based upon the research that we have undertaken for this study, this is a conclusion with which stakeholders tend to agree.

Participants in a meeting between the study team and CAGAC members suggested:

'CAGAC members would welcome some level of social enterprise, but are wary of what that might mean in terms of competitive forces driving down provision (e.g. volunteers replacing paid staff as in the community library model; competing service providers undercutting those in neighbouring counties; ...).'

⁴² 23rd January 2018 Report to Flintshire Council Cabinet, [Proposals for Integration of the Arts Development and Music Services with Theatr Clwyd](#)

⁴³ [Report of the task and finish group on Music Services in Wales 2015](#)

This further points to the need for any alternative delivery model to operate with a clear framework that specifies a range of outcomes for the delivery of Music Services. It is important to note that we have not found any use of volunteers in service delivery beyond the 'Friends of ...' charities.

In a context in which it is already possible for schools to purchase Music Services in the market, however, a consideration of alternative delivery models cannot be limited to those in which one organisation is expected to deliver all required services in a local authority area. There is already a trend for a much more pluralistic offer of Music Services. This was welcomed by several stakeholders, as illustrated by one national organisation stating: 'A healthy ecology is varied.'

One salient example is that of 'Sistema Cymru' delivered by Codi'r To, which is a community regeneration project that brings the world-renowned El Sistema teaching method to North Wales and works in two schools: Ysgol Maesincla in Caernarfon, and Ysgol Glancegin in Bangor⁴⁴. Professional music tutors work in the schools leading activities and lessons, giving children the opportunity to learn to play brass and percussion instruments. They also make connections with the families and the neighbourhood surrounding the schools by bringing live music to the community and giving opportunities for the pupils to perform in public.

The aim of Codi'r To is to transform lives through music. It is a community development project that aims to improve the lives of individuals and families, by working in primary schools to give new experiences through musical tutoring.

This project is backed by The Arts Council of Wales, Communities First, Gwynedd County Council, Children in Need, North and Mid Wales Reaching Wider Partnership, Widening Access Centre, Bangor University, Steve Morgan Foundation, Paul Hamlyn Foundation, People's Postcode Lottery, Garfield Weston, Big Lottery Fund, Ysgol Maesincla, and Ysgol Glancegin.

Looking farther afield, the Scottish Youth Music Initiative is a further example of a delivery model that goes beyond existing patterns of Music Services led by local authorities. With similarities to the recently created Anthem – Music Fund Wales, the Youth Music Initiative (YMI) is a Scottish Government music education programme administered by Creative Scotland, which is the public body that supports the arts, screen and creative industries across all parts of Scotland. Through a targeted fund for Scotland's 32 local authorities, YMI offers the mechanism with which to deliver the Scottish Government's commitment to ensuring that every pupil across the entirety of Scotland is offered a year of free music tuition by the end of primary school. With an annual budget of £9 million, YMI also offers other funding programmes targeting the wider youth music sector, particularly where it operates beyond school settings.

⁴⁴ [Sistema Cymru - Codi'r Tro](#)

4.3 Music Hubs in England and the National Music Plan for England

A review of the curricular changes in England by the British Phonographic Society found that the governmental policy emphasis upon 'core' subjects such as literacy and numeracy, particularly since 2014, has weakened the subject in primary schools. They suggest that following the 'watering-down' of the National Curriculum, the place of music in the educational experience of young people has weakened significantly⁴⁵. Some schools have removed GCSE Music from the curriculum altogether and the number passing A-Level Music has dropped by 25.4% since 2014 (JCQA 2018).

In 2011 a total of 123 Music Hubs were formed as part of the National Plan for Music Education (NPME) (soon to be revised), many of which were existing LA Music Services, although some were private trusts or agencies. The NPME had four main aims in relation to creating opportunities for all 5–18-year-olds to learn a musical instrument, play in ensembles, have access to clear progression routes and develop a singing strategy.

The Music Hubs are now responsible for the provision of instrumental music education. The majority of their income stems from governmental funding (just under 39%), school contributions (just over 30%) and parental contributions (almost 17.5%).

Up to 2017, Music Hubs performed as follows in relation to their core activities:

- The number of pupils receiving whole-class tuition in 2016–17 constituted 711,241 (over 90% primary-age children in Year 4), with just under 30% progressing from whole-class activities to small-group or individual tuition.
- Over four years, there was an almost 42% increase in pupils receiving whole-class tuition for less than one term only.
- The number of pupils receiving tuition on a small-group or individual basis constituted 541,910, of whom 238,909 were learning in groups.
- Music Hubs reached just over 9% of the school population (primary and secondary).
- Music Hubs provided 16,809 ensembles or choirs in 2016–17 to 321,363 pupils (down from 347,556 in 2014–15) — representing 4.5% of the state-funded school population.
- Music Hubs provided 3,647 vocal ensembles throughout the year, reaching just under 89% of schools. These were predominantly primary-based.

Without statutory obligations, the Music Hubs struggled to engage with schools, resulting in an increasing reliance upon zero-hour contracts or self-employed teachers. The fragmentation of music education as a result of curricular reforms and the diversity of approaches adopted by hubs and other bodies is seen by some as significantly reinforcing a 'postcode lottery'.

The 2019 State of Play⁴⁶ report makes a number of recommendations in relation to:

- strengthening the employment conditions of music teachers, including a focus upon qualifications and CPD;

⁴⁵ [British Phonographic Industry Research March 2019](#)

⁴⁶ State of Play: A Comprehensive report into the State of Music Education in England, Musicians Union, April 2019.

- a need to hold Music Hubs to account for their performance — including as catalysts for local networking and overseeing effective progression routes — and the value for money that they deliver, while giving them greater freedom to prioritise provision in line with local needs;
- making additional funding available for children from low-income families;
- strengthening the status of music as a core subject of the National Curriculum, including attention being paid to it as part of the school inspection regime;
- enhanced use of technology for music teaching.

Further details of the English context are given Appendix 2.

4.4 The Scottish Experience

The situation in Scotland in 2019 was highlighted in a report written by the Music Education Partnership Group (Scotland) entitled *What's Going On?*⁴⁷. The delivery structure is similar to that of Wales in that it is based upon Music Services run by local authorities.

The key findings from this research are summarised as follows:

- Funding for Music Services in Scotland via local authorities constitutes £24m, plus parental contributions of around £4m (or roughly 16% of the total costs). Based upon a population of 5 million people, this equates to £4.8 per learner compared to £1.38 per learner in England.
- Music Services have maintained an average participation rate of 8–9% in respect of pupils taking instrument lessons, despite financial constraints.
- The evidence indicates that the increased prevalence of charging for music lessons has accelerated a widening equity gap between the more affluent and those in poverty.
- There is a perception of a devaluation of music relative to other subjects in formal education.
- There is a decreasing understanding of the opportunities for employment within the music industries.
- In 2017–18, approximately 244,000 young people participated in the Youth Music Initiative, with at least 202,000 participating in school-based activities and at least 42,000 in out-of-school activities.
- Despite financial challenges, just over 60,000 young people received tuition from Music Services funded by local authorities in 2017–18.
- Small providers have faced difficulty in sustaining their provision, and the effectiveness of networks and partnerships has not yet been fully realised, though there is a clear appetite to strengthen them.
- Economies of scale and efficiency savings could be promoted through national and regional pooling.
- Demand outstrips supply to such an extent that non-formal, third-party sectors and private suppliers all have a place in the ecology of provision; currently, this is incoherent.
- The average (median) proportion of pupils receiving tuition through local Music Services constituted around 8–9%. This suggests that the number of pupils receiving tuition is determined by the supply, not the demand.

⁴⁷: [What's Going On Now: A study of young people making music across Scotland](#)

- Seventy per cent of pupils learning an instrument at school contribute towards the cost of tuition.
- Of the 32 local authority Music Services, 25 are now charging for tuition. The average (median) fee is £220. The maximum fee is £524.
- The Highlands Music Service is now a private trust — the first in Scotland.
- The future of Midlothian Music Service — Scotland's first council to entirely cut funding — is currently under review⁴⁸. Tuition fell by 39% after the council increased charges to over £200 per annum.
- Around 19,000 pupils receive free tuition.

4.5 Northern Ireland

For 50 years, education was run by local Education and Library Boards, until in 2015 a unified Education Agency was created. Consequently, Music Services were delivered independently in five areas until a Northern Ireland Music Service was created in January 2017. The service covers 72% of schools in Northern Ireland. This is because it has been assumed that grammar schools were in a position to provide their own music tuition. Around 54,000 learners use the service.

The service in Northern Ireland is fragmented in a very similar way to that of the Welsh one. Each of the five regions provides different services and has different charging structures and employment processes for tutors; in Belfast, for instance, tutors are predominantly on qualified teacher pay, which is not the case elsewhere. As in Wales, there is a strong private sector of music tutors.

The service invoices schools for tutor time. It is up to schools whether and how they pass these charges on to parents. Some pass on the full charge, while others subsidise disadvantaged learners to a greater or lesser degree.

There are paths for talented pupils to progress via regional ensembles to Northern Ireland-wide ensembles such as the Ulster Youth Orchestra and Ulster Youth Choir.

The service is just starting a strategic review with the aim of moving to a national service with three regions, a unified service offer, a common pricing policy and common terms of employment for staff.

Quality of delivery is maintained through having a programme for regular staff training and development, the sharing of expertise, and monitoring student examination performance. There is an annual appraisal process. The Education Training Inspectorate do not inspect Music Services. Following the review, this may change.

The service is non-statutory but is government-funded at a level of £3.5 million per annum, with a further £3.5 million deriving from charging for lessons, producing a total turnover of £7 million per annum.

⁴⁸ [Edinburgh Evening News](#)

4.6 How Does the Experience Elsewhere Relate to Wales?

The major learning from examining these Music Services is that Wales is not alone in facing the issues outlined in the remainder of this report.

Scotland has a similar structure to that of Wales, with local authorities being the main providers, although the charity sector has started to take over some provision, and more money is being spent per head than in Wales and England.

Northern Ireland has transitioned from a local-authority-based model to a national model but has yet to address the issues of disparate services, charging models, and terms and conditions for music tutors inherited from the old local authority services.

The Scottish Government contributes £4.80 per learner compared to £1.38 per learner in England and £1.46 in Northern Ireland. Parental contributions are much lower in percentage terms in Scotland (17.5%) as opposed to being nearer to 50% elsewhere.

Only England has a National Plan, although Northern Ireland is considering it.

The English National Plan has been in existence since 2011, when it was commissioned by the then-Education Minister, Michael Gove. The introduction of Music Hubs has focused attention; however, there remain serious concerns surrounding their operation (see Appendix 2 for further details). For example, the Musicians' Union has been very critical of the conflict of interest in the continuing role of local authorities who run hubs which commission services from themselves as well as from alternative suppliers.

The experience in England would seem to suggest that the introduction of the new curriculum in Wales represents a unique opportunity to strengthen the standing of music as a subject in schools. It appears as though the English Hub model does not yet sufficiently address the need for continuity in music teaching, which is essential in creating equitable pathways for the progression of particularly talented learners.

Furthermore, the review of the model suggests that several other factors are necessary for a successful model:

- a shared focus upon outcomes guided by a national framework and clear accountability mechanisms;
- a degree of coherence in terms of music tutor pay, terms and conditions, and qualifications;
- a need to stimulate and allow experimentation with innovative music education offers (e.g. making use of technology).

5 Should There Be a National Music Education Plan for Wales?

5.1 Background

The Culture, Welsh Language and Communications Committee suggested strongly that a National Plan for Music Education is required.

Almost all of the stakeholder interviews agreed that such a plan was urgently required. This was true for those who suggested that the delivery model should be local-authority-based or regionally based as well as those who favoured a national model of service delivery.

‘Very much in favour of a National Plan/strategy from which action would follow, but not too elaborate.’

‘A National Plan would allow for consistency in what is delivered for the benefit of all learners.’

‘I would favour a regional model for delivery, but it needs to be with a national strategy to ensure a level playing field.’

Making music tuition a statutory right is the way forward, but that has to be in the context of a national agreement on what a Music Service should look like.’

One local authority stakeholder linked the need for such a plan to funding:

‘An overall strategy is important, but funding is key. Could there be a ringfenced funding pot with money from education, arts, and local authorities? ... Those local authorities no longer contributing — Powys, Cardiff, etc. — could be brought back into line with the carrot of more money for the new, perhaps linked to the curriculum and the Expressive Arts AoLE.’

What is more, it was clear from stakeholders that any such plan must be made mandatory; otherwise, it would remain an aspiration rather than a reality. Previous attempts at voluntary change by local authorities (as recommended by the Task and Finish Group) were acknowledged to have failed in influencing decisions.

In view of the current complexity in the provision of music education in Wales, a National Plan for Music Education could provide an instrument with which to create greater coherence and drive specific improvements. A National Plan for Music Education could provide a reference framework for key stakeholders to consider and agree upon the most appropriate solutions for individual aspects of the provision of music education in Wales.

We have considered the rationale for and the role of a National Plan for Music Education in Wales separately from the options for a delivery model for music education. This section therefore sets out the generic content and principles that the plan should set out. Clearly, the plan would need to be ‘owned’ by an organisation or a defined partnership.

The precise terms of the plan could be developed by the Welsh Government and then given to the organisation which would deliver it. Alternatively, it could be the first task of a new organisation to create the plan in consultation with stakeholders, which a new organisation will then maintain and deliver.

The content and principles put forth here draw upon the evidence collected and analysed for this study, including the documentary review, stakeholder interviews, and the survey of current provision of music education in Wales, as well as identifying any good-practice elements from the reports of the changes in provision of music education in England, Scotland and Northern Ireland.

5.2 What Would Be the Precise Objectives for a National Plan for Music Education?

The views gathered from stakeholders indicated that a National Plan for Music Education would provide a framework with which to deliver the kinds of action required in order to maintain a high-quality music service by creating coherence and consistency of provision throughout Wales. From these interviews, the Task and Finish Report, the National Assembly Committee Report, research on music education, and using experience from the English National Plan, the National Plan for Music Education in Wales would help to deliver against the following objectives:

In educational terms:

- to provide a framework for music education in schools, local authority Music Services , and other organisations that allows for clear benchmarking in terms of quality and provision as a strong component of the Expressive Arts Area of Learning Experience in the Curriculum for Wales;
- to raise standards and provide consistency in the provision of music education opportunities for all children and young people across the country;
- to address the inequalities in current provision and ensure equal access and opportunity for children and young people in every part of the country;
- to raise aspirations across the country in respect of the benefits of music education for all;
- to highlight the key research evidence associated with the benefits of music education for all;
- to outline key progression routes for young musicians from pre-school to university and beyond;
- to provide guidance and support to parents and guardians;

In organisational terms:

- to create a shared agenda and aspirations surrounding music education in Wales;
- to signal opportunities for innovative and creative approaches in music education for new organisations seeking to develop their work in this arena;
- to connect those with wider commercial interests and those delivering music education programmes around a set of core values and aims;
- to help develop musical communities across Wales and signpost, illustrate and share best practice against the shared aims and values expressed within the plan;

In political terms:

- to establish political momentum and ongoing support for music education in terms of support, a clearer structure of accountability, and ongoing funding from government and other sources;

- to ensure that music education for all is recognised as a core democratic value that is at the heart of all those organisations working within, supporting and benefitting from the Welsh music education system;

In economic terms:

- to produce musicians in order to provide a continuing workforce for the music and entertainment industry and contribute to the wider economy of Wales;
- to support partnership working between different public and private organisations, charities, co-operatives, and others wanting to develop new approaches to music education;
- to promote entrepreneurship in the sector against the key principles outlined within the plan;
- to encourage creativity within the sector, particularly with the use of new technologies, in order to help deliver music education opportunities in new ways to those in remote parts of the country.

The National Plan for Music Education should therefore provide a framework and benchmark for the provision of a high-quality, comprehensive and developmental music education offer for all children and young people in Wales. It should provide a clear rationale according to which all interested parties can work together in partnership.

5.3 What Should Be in a National Plan for Music Education in Wales?

This section is based upon our interviews, the Task and Finish Group Report, the National Assembly Committee Report, research on music education, and using experience from the English National Plan. The Welsh National Plan will need to be developed the collaboration of all stakeholders. This was a recommendation of the National Assembly Committee Report.

The National Plan for Music Education should encourage and reward the building of strong partnerships for music education across Wales. These partnerships should include schools, colleges, universities, local authorities, Music Services, charities, co-operatives, and other organisations with an interest in the promotion of high-quality music education for all. The plan should not be inward-looking; rather, it should celebrate the multiplicity of approaches and locations within which music education can take place, drawing them together and ensuring that core values associated with a democratic and inclusive music education are promoted. The National Plan for Music Education in Wales should identify and highlight partnerships in order to ensure progression and provide evidence of best practice in creating appropriate pathways. It is within these partnerships that the strongest resource base for music education will be established.

Furthermore, the National Plan for Music Education should provide clear details regarding the funding of music education in Wales. This should include the expected spend associated with Welsh Government and local government funding, and provide an indication of what parents and schools should be expected to contribute. There should be a recognition of increased costs associated with gifted and talented children, those with special educational needs and those in geographically remote parts of the country.

In order to provide an appropriate framework with which to deliver upon expectations, we recommend that the National Plan for Music Education should have six key components:

1. Music in schools

2. Instrument tuition and ensembles
3. Initial teacher training
4. Professional development
5. Resources
6. A quality framework for music education in Wales

Music in schools

The National Plan for Music Education should make clear how music sits within the Curriculum for Wales so that the Expressive Arts Area of Learning Experience can provide a comprehensive, developmental and coherent music education for all children aged 2–18 in early years settings and maintained schools.

Introducing the Curriculum for Wales is an opportunity to ensure that every child in Wales receives access to a comprehensive music education, featuring the principal activities of singing, performing, composing, listening and evaluating. Music is one of the five domains which schools will need to deliver as part of the Expressive Arts Area of Learning Experience.

The progression steps within the Expressive Arts Area of Learning Experience are explicit in outlining the elements and forms which should be achieved by learners as they mature.

However, it is very important to note that the Curriculum for Wales is concerned with the teaching of music to all learners. This is different from, but related to, music education. The work of other providers, including local authority Music Services, co-operatives, charities and private companies, should support the curriculum offer (rather than being seen as replacing it). The National Plan for Music Education must work in parallel with the Curriculum for Wales and assist schools with their curriculum offer.

The accountability framework included in the National Plan for Music Education must also look at measurements of quality, impact and progression within the music education programmes offered by schools. As part of this process, best practice should be identified and celebrated through champion or beacon schools. This can build upon the network of Creative Schools which have been fostered by Arts Council of Wales initiatives over the past few years, as well as the work of Pioneer Schools which have been developing the Expressive Arts Area of Learning Experience. These schools could receive additional resources in order to help spread their best practice throughout the region and online through a dedicated virtual resource network (see below).

The National Plan for Music Education should signal clear progression routes for children's development through the various music education programmes organised by schools in partnership with the providers of instrument lessons and musical ensemble activities, as well as other interested parties. These progression routes should be wide-ranging and include examples of those children who show not only particular musical talent, but also Alternative Learning Needs (such as those with physical, cognitive or other learning difficulties). The National Plan for Music Education should highlight key stories associated with the achievements of young people in order to raise expectations and aspirations throughout the country regarding the broad range of cognitive, physical, emotional and social benefits of music education for all at all levels of attainment.

There should be a clear, consistent funding mechanism so as to ensure that music instrument tuition and participation in ensembles are available to all of those who wish to

take advantage of them. This should encompass not only learners who are eligible for free school meals, but also those with low incomes but not eFSM who cannot afford to pay for music lessons.

Instrument tuition and ensembles

The National Plan for Music Education should outline ways in which the key organisations responsible for the delivery of instrument tuition should operate across the country. Central to this offer should be the requirement of these organisations to work collaboratively with schools to substantiate and build upon the curriculum-based music programme in their local areas.

The National Plan for Music Education should detail the range of provision expected by these organisations, including the provision of individual and group instrument tuition programmes, the provision of musical ensemble opportunities, holiday courses, instrument hire and purchase schemes, and clear progression routes from school-based activities to regional and national ensembles. It should not be prescriptive in this respect, but rather should give organisations a broad framework within which to work in order to ensure that each child in Wales is able to easily access an extended range of instrument teaching opportunities and musical ensembles.

The National Plan for Music Education should encourage and facilitate new forms for the delivery of instrumental music lessons using a range of internet-based technologies, e.g. the use of video and internet-based technology. These have a proven record of success in other parts of the UK, as we have outlined in 3.4 above. These approaches have enabled 'hard-to-reach' children in geographically isolated parts of England and Scotland to participate in instrument learning, in the majority of cases with their form teacher. The National Plan for Music Education should carry out a case study of such approaches and present an outline of how they could work in ensuring equal access to music opportunities across the country, especially in those rurally isolated areas.

Initial teacher training

Initial teacher training in Wales has been refreshed for September 2019. In this context, the National Plan for Music Education should consider the routes associated with the award of a Qualified Teacher Status for music graduates within programmes of initial teacher education. A broader, networked approach to this, with higher education institutions taking the lead and with schools, Music Services and other providers working in partnership with them, should maintain the academic rigour associated with studying for a postgraduate qualification alongside the provision of teaching placements in a range of settings.

Opportunities for flexible, part-time study and assessment-only routes should be considered for those music graduates wanting to obtain higher-level teaching qualifications but who are unable to give up their employment in order to undertake full-time study.

Professional development

The National Plan for Music Education should outline a wider range of continuing professional development opportunities for teachers in schools and colleges and for instrument teachers. These should be of a good quality and accessible through a range of formats (including face-to-face and online formats). Engagement with continuous professional development opportunities should be an entitlement for all teachers working in music education and not a luxury for some.

The National Plan for Music Education could adopt a formal qualification for music tutors, such as the Certificate for Music Educators (CME) for instrumental music teachers with no formal teacher training.

Resources

The National Plan for Music Education could include the development of online music education materials (a one-stop shop for all music-related things). This could be accommodated with the Hwb system or as a standalone website.

This could provide guidance on:

- The benefits of learning music
- Free classroom materials and resources
- Learning a musical instrument
- Video tutorials
- Podcasts and blogs
- Ensemble opportunities
- Progression routes from local groups to national portfolio ensembles
- Instrument hire and purchase schemes
- Links with the community
- Concerts, festivals and events
- Adult learning opportunities
- Higher education

The National Plan for Music Education should consider ways of helping to create partnerships within online space. It could encourage the development of shared resources and online spaces within which high-quality approaches to the teaching and learning of music could be offered to young people, including the opportunity to learn to play musical instruments through online lessons. The Welsh Government Hwb learning portal is the obvious vehicle for making this happen.

National Plan for Music Education online resources could be considered a stimulus for this form of sharing and resources could flow from this in order to facilitate new project working with a range of new providers. Key public bodies such as the BBC could be encouraged to enter this new space and work alongside other music education organisations in helping to develop content that works alongside the physical programmes offered by instrument-teaching providers and the wider school curriculum offer that each child is accessing via their schooling.

A quality framework for music education

Importantly, the National Plan for Music Education should establish a shared understanding of what constitutes quality in music education. This should be expressed both in terms of criteria and benchmarks to enable the assessment of quality in actual delivery on the ground and in terms of an ongoing process of discussing and working towards a continually refreshed understanding of quality.

The assessment of quality should go beyond a pure numbers game of pupils participating in music experience and instrument tuition. Instead, it should draw upon a well-thought-out set

of KPIs that will be incorporated into all contractual arrangements in relation to music education.

Relevant quality criteria might include the diversity of opportunities offered, the continuity of provision, and the coherence and effectiveness of progression pathways, but, equally, aspects such as teachers' musical and teaching competence, responsiveness to young people's preferences and feedback, and safeguarding.

For such a quality framework to be effective, Estyn would need to play a role in 'policing' it. The school inspection regime is being looked at in order to align with the rollout of the new curriculum, and the development of a quality framework could form the basis for Estyn inspections to consider the role of music in the provision of the curriculum and a school's engagement with music education outcomes.

From our discussions with Estyn, the lack of a common framework regarding what a local authority Music Service should look like, or precisely what it should be delivering, means that it is impossible to form a judgment as to whether or not it is operating as it should be.

6 Key Considerations in Moving Towards a New Delivery Model

6.1 Key Stakeholders

The role of schools

Schools control their own delegated budgets and are able to purchase from providers directly. They are therefore key decision makers when it comes to music education in Wales. Currently, while there is an obligation to provide music teaching in schools, there is no statutory requirement for local authorities to deliver a Music Education Service, there is no formal specification of what a Music Education Service should provide, and schools (via their headteachers and governing bodies) ultimately decide upon how music education is delivered.

They define and shape what is being delivered by using internal resources (teachers or teaching assistants with the necessary skills and experience) and buying in services (e.g. from individual tutors, local authority Music Services, private companies, charities or social enterprises, and co-operatives).

School budgets are under pressure and it is likely that schools will seek to keep the cost of providing music education down. The costs of sourcing Music Education Services to the school could potentially be reduced with whole-class initiatives.

The Pupil Development Grant, which supports interventions and enriching activities for eFSM learners, can be used to pay for music lessons as long as it is seen to fit the criteria for funding. Although music instrument tuition in itself would not qualify, it would be eligible if it could be seen to broaden the outlook or contribute to a better discipline and love of learning, for instance⁴⁹.

⁴⁹ [Using the Pupil Deprivation Grant in support of arts and cultural activity](#)

In view of these pressures, relying upon school leaders to value music education and the wider benefits that it can bring and to encourage parents to pay for lessons is on its own unlikely to deliver consistent and coherent provision of music education in Wales.

The English model uses a different funding architecture for the provision of Music Education Services. The National Plan for Music Education (NPME) in England ‘came with financial commitment to its vision, the Music Education Hub grant. Schools remained responsible for funding the delivery of the national curriculum and the hub grant, awarded to the lead organisation, enabled music making beyond the responsibility of a school.’⁵⁰ The grant funding for the hubs (amounting to £75 million from the Department for Education (DfE) in the financial year of 2017/18) is administered by the Arts Council and replaces any budget for music education beyond curriculum-based provision for schools. This is based upon the conclusion in the original 2011 NPME which suggested: ‘Schools cannot be expected to do all that is required of music education alone: a music infrastructure that transcends schools is necessary.’⁵¹

Music Hubs often struggle to secure engagement of schools in delivering music education beyond the curriculum; therefore, it becomes clear that such funding decisions are intrinsically linked to interdependencies between curriculum-based provision and other elements of music education. In Wales, this issue has not yet been resolved conclusively and much will depend upon how the new curriculum is rolled out.

In this situation, removing the responsibility for making choices regarding music education (and the associated budget) from schools would represent an unduly, radical departure from the current situation. It is difficult to see how such a transition could be managed effectively in order to secure the continuity of provision. Therefore, it seems advisable to retain a role for schools in making those choices, albeit in the context of a much clearer and rigorous framework in respect of what is expected.

The example of the Scottish Youth Music Initiative illustrates that additional funding streams can be used to complement local-authority-based or school-based spending decisions in order to drive specific governmental objectives regarding music education. This is based upon a decision in Scotland that instrumental Music Services should continue to be managed at a local authority level, but can be complemented through partnership working with local authorities so as to achieve national objectives.

Understanding how school-based decision making will interact with different delivery models is therefore fundamental to any proposed solution.

Providers

As has been outlined, a wide range of providers deliver Music Education Services in Wales. There is quite a crowded marketplace. Within this complexity, there are further complicating factors. Music tutors are not evenly spread across Wales. For example, South East Wales

⁵⁰ [Music Mark The Future of the National Plan for Music Education 2018](#)

⁵¹ [Key Data on Music Hubs 2017, Arts Council England](#)

has more job opportunities for musicians, many of whom supplement their income as part-time music tutors. Evidence from the survey suggests that South East Wales has lower prices than those in rural areas of Wales, wherein there is likely to be less competition in the market.

In relation to developing options for a new delivery model, an important consideration will be concerned with how different providers in the marketplace should and will be able to interact with a new way of sourcing Music Education Services, as well as how choices will shape the offer and cost of different services.

The workforce – music tutors

Just as the marketplace is diverse, so is the workforce, which is employed on a varied range of contracted arrangements. This section is based upon information from the survey of Music Services and from stakeholder interviews, including with the Musicians' Union representative in Wales. It would be useful to obtain the views of music tutors themselves regarding how they perceive the way in which they are employed, feel they are valued, and whether or not they see a long-term future as music tutors.

The issues described are UK-wide and the Musicians Union has a number of publications on the subject, which have further broadly informed this analysis⁵².

The evidence allows the identification of the following range of employment terms and conditions for music tutors:

- Individual self-employed tutors contracted directly by parents: This is unregulated, with it being unclear as to whether or not all parents check if tutors are DBS-checked and/or properly insured.
- Individual self-employed tutors contracted directly by schools: While all schools have safeguarding procedures in place, they should also be checking if the necessary insurance is in place and whether or not individuals have the statutorily required registration with the Education Workforce Council.
- Individual self-employed tutors contracted directly by a local authority/co-operative/charity/private company.
- Individual self-employed tutors contracted as an agency by a private company: Here, the responsibility lies with the private company, which may be regulated as an employment agency.
- Tutors employed directly by a local authority, usually on a permanent basis with an agreed minimum number of hours.
- Some tutors work under several of these headings, often mixing work for the local authority with private tuition.

⁵² [2017 Musicians Union Music Education Report](#)
[The State of Play: A review of Music Education in England 2019:](#)

Whilst those staff on PAYE contracts directly with the local authority are clearly DBS-checked and registered with the Education Workforce Council, not all Heads of Services were able to be certain that all staff on other forms of contracts were registered with EWC (as required by law).

Whether and how any new delivery model would affect employment conditions for music tutors will need to be borne in mind if indeed securing a sustainable workforce is recognised as a goal for the development of a new delivery model.

6.2 Key Levers for Implementation

Strategic collaboration

Numerous organisations are involved in delivering Music Education Services through a number of models and delivery mechanisms. Others have a stake in the wider landscape that underpins music education (e.g. the Arts Council of Wales, Anthem). A number of crosscutting debates surrounding the most appropriate nature of services and the allocation of resources in order to achieve the overarching aims for music education in Wales are far from being settled.

A number of quotes from the stakeholder interviews will serve to illustrate the current climate in the sector:

‘There is an impression of organisations fighting for their survival.’

‘Even schools themselves are now territorial (e.g. only working across their comp — feeder school clusters) and have no money to buy in services.’

‘The existing Music Services are beleaguered by history — even with investment this wouldn’t go away.’

‘I am pessimistic regarding the possibility of anything developing out of the existing model.’

In spite of a degree of tension in the sector, the research undertaken for this study suggests that despite an impression of decline, there is also a great willingness to find a way of tackling the issues. There appears to be an opportunity to tap into assets beyond the local level in order to put music education in Wales on a new footing: ‘We are willing to play a proactive role (alongside other national organisations) in addressing this gap, and believe this should be an expectation towards all national organisations (as it is part of our remit to open out).’ (National music charity)

However, this is accompanied by an expectation of genuine renewal: ‘We need to be able to shake up the model in order to respond to what young people want.’ Furthermore, there is a desire to question old certainties: ‘We want to be more participant-led, for instance, not having to read music any longer to be allowed to sing in the choir, while putting in development pathways. However, this is harder for instruments, but do you have to be graded to play in an ensemble?’ (Music charity)

For many stakeholders, introducing more fundamental change requires a new beginning: ‘We would welcome a national body, which could provide fresh energy and provide a ‘let’s get on with it’ team.’ (National Charity) The introduction of a National Plan is seen as a way of jointly developing an understanding of what Music Education Services need to achieve and how this can best be done.

Initiating the process of developing and establishing the National Plan for Music Education in Wales is an important lever for the Welsh Government to catalyse and frame strategic collaboration. However, in view of the organisational and political complexity and existing tensions surrounding the allocation of resources and the roles and objectives of different organisations, without the effective use of other levers this will not lead to the anticipated change.

Direct Welsh Government levers

Beyond the role of convenor for strategic collaboration to stimulate and support medium-term change, the Welsh Government has several more direct levers with which to stimulate change.

Funding

Beyond the current funding approach, a number of mechanisms could be used to make additional funding available for music education in Wales. Targeted funding could, for instance, be provided by top-slicing the Revenue Support Grant. This would still allow local authorities to add to the national allocation if they so wished.

Alternatively, dedicated Welsh Government funding could be made available for specific objectives (e.g. ensuring equality of access for children from less affluent homes) and administered by an existing or new organisation.

Legislation

Legislation has a role to play in ensuring that educational outcomes are delivered. Local authorities could, for instance, ignore a directive in relation to the provision of music education that is not based upon legislation. However, the Welsh Government will need to strike an appropriate balance between using the National Plan for Music Education in Wales as a platform for joint strategic initiatives with stakeholders and identifying specific needs to use statutory instruments where voluntary collaboration is not effective enough.

Recognising the crucial role that schools have to play, it may therefore be necessary to consider the introduction of a statutory duty on schools — associated with corresponding funding allocations — to deliver against specific outcomes and/or use secondary legislation to ensure an appropriate inspection regime for music education. The development of statutory guidance to accompany the rollout of the new curriculum represents a unique opportunity to embed a stronger focus upon music education within schools in Wales.

Specific delivery mechanisms

A number of specific mechanisms can be built into the different delivery model options in order for them to deliver upon the outcomes and standards for the provision of Music Education Services in Wales that have been identified in this study.

Several key levers are available for translating stakeholder expectations into practice. In turn, considering how the following mechanisms might play a role in different options, therefore, also offers a way of assessing their desirability:

1. **Clearly defining what a Music Education Service should provide** (as encapsulated in the Task and Finish Group checklist) is a first step in ensuring consistent, high-quality provision.
2. Meeting diverse objectives and catering to a diversity of needs and preferences in terms of music education mean that provision needs to be equally diverse. In order to ensure that value for money is achieved, a mechanism for **quality control** needs to be built into the system. Introducing a strong commissioning model with well-defined quality thresholds would be one way of doing so in the current mixed economy. Alternatively, introducing an **inspection regime** might be possible; however, it could be difficult to do so on a local authority basis, given that providers spread across boundaries. Making it part of the school inspection framework might be feasible, linking the quality of education to the provision of expressive arts, including music, and providing a clear framework with which to assess the quality of music education.
3. Without public funding on a scale that makes all music education free at the point of use, some kind of **market mechanism** will need to be part of the mix. However, clarity regarding the precise nature and role of such market mechanisms should be agreed upon throughout Wales.
4. In order to avoid a 'race to the bottom', with music tutors in precarious employment undercutting competitors, **key principles for the pay and conditions** in any new delivery model could be agreed pan-Wales, and collective action for independent music teachers enabled.
5. Alongside ensuring commensurate pay for music teachers, a **qualification framework** is required in order to ensure the quality of provision while providing quality regarding the 'return on investment' for different qualifications.
6. Any **funding** for music education should be allocated on the basis of a **clear understanding of different objectives** in relation to music education and of different pathways into musical excellence (as a musician, teacher and listener).
7. Any **contracts** for the provision of music education should be based upon **agreed outcomes** for inclusion and progression that go beyond mere numbers of children participating in music tuition.
8. Any new delivery model for music education in Wales should **maximise partnership working** so as to ensure that (funding for) diverse opportunities for progression are available, visible and accessible, including beyond local administrative boundaries and

ideally facilitated by a lead organisation in order to ensure the local reach of such progression pathways.

6.3 In Summary

The research up to this point, building upon a large body of existing work, confirmed some key challenges surrounding the lack of consistency and coherence in the provision of Music Education Services in Wales. The picture that emerges is one of considerable complexity at several levels:

1. Complexity of detail in terms of coordinating the deployment of music tutors, instruments, curricular support, and a wide range of different offers related to musical experiences and music tuition, with diminishing resources and an unclear status of Music Education Services in schools in Wales.
2. Strategic complexity in terms of adapting Music Education Services to a changing landscape regarding the understanding of how Music Education Services need to be designed to deliver upon specific outcomes (e.g. equity of access, well-being, identification of and progression for musical talent).
3. Political complexity in terms of strained relationships between key stakeholders, pressures upon the existing delivery infrastructure, and considerable historical 'baggage' that prevented progress in finding joint solutions with respect to introducing consistency and coherence into the provision of Music Education Services in Wales.

Stronger national coordination of the delivery of Music Education Services emerges as an important priority in setting music education on a new footing. The key question for a new delivery model, therefore, is concerned with how a suitable framework can be created to support stakeholders in jointly developing an understanding of what music education provision in Wales needs to look like in order to achieve specific outcomes and objectives.

7 Options to Consider

From our discussions with stakeholders, as well as our analysis of the current situation across Wales (as outlined in Section 4), it became clear that there are a limited number of options realistically available for consideration, which are discussed in the subsequent sections. Moreover, it became clear that in view of the considerable complexity involved in the choices that need to be made, the development of options needs to focus upon creating an appropriate framework for the governance and coordination of actual delivery on the ground (rather than the delivery infrastructure itself).

Some local authorities and the WLGA continue to favour local authority autonomy. Some CAGAC members favour a regional model. However, the overwhelming opinion is that there should be some form of national coordination with a National Plan for Music Education. Without this, the current disparities in provision will continue.

There is a mixed economy of provision, wherein schools are the decision makers and upon which government has limited influence. It would be difficult to dismantle and return this to the public sector. A key point is that this marketplace does not respect local authority

borders. Independent providers — private-sector providers, co-operatives, and charities — can and do operate independently across regions, which is also true of some local authority Music Services.

Based upon this evidence, our opinion is that it is not possible to return to the days of having a Music Service acting as the sole provider of Music Education Services in each local authority area (or even in a region). This is not to say that there does not remain a place for a well-run local authority Music Service, using its local knowledge as an important part of its community; however, it must be of a high quality and deliver upon nationally agreed outcomes.

In the analysis of the options, we suggest a commissioning model which would deal with the complex mixture of provision in the marketplace in a way which would provide a level playing field for providers and create the space for new downstream delivery models to emerge (e.g. co-operatives), but, much more importantly, deliver a fairer service with consistency of outcomes across Wales for the music learners who are at the heart of this process.

Potential options that were considered for the institutional infrastructure governing the provision of Music Education Services in Wales include:

1. The status quo — a disparate service which is gradually shrinking with loose coordination, based upon local authority provision
2. Allowing the market to determine provision
3. A strong national coordinating body run by providers, including local authorities/co-operatives/charities/private businesses, and individual tutors, which would be an extension of CAGAC, whereby forming a more representative formal body
4. A regional service with a national coordinating body
5. A national service

7.1 Assessment Criteria

The development of options for a new delivery model for music education in Wales needs to take into account several layers of considerations:

- **Criteria:** Firstly, different options need to be assessed on the basis of what they achieve for music education in Wales. The work carried out thus far through the Task and Finish Group and the National Assembly Committee inquiry has led to a set of key considerations in driving choices, namely a sustainable workforce, equality of access, and progression with regard to the 'Welsh pyramid'. The options therefore need to be assessed in terms of how well they deliver upon these objectives.
- **Mechanisms/activities:** How will delivery against these objectives be organised? What mechanisms will be used? What activities will be delivered? Stakeholder views suggest, for instance, a strong consensus that a mechanism is required in order to ensure that all provision is quality-assured.

- **Overarching model:** For a delivery model to be effective, the activities provided need to be integrated and aligned with a range of existing activities and contexts. A key question for the consideration of options, therefore, is concerned with how an option can be implemented in collaboration with the local level (LAs/existing Music Services and other providers; teachers; parents and children; complementary organisations), what the levers/incentives are for them to become involved, and how this ties in with assets and resources elsewhere?
- **Journey/transition:** Finally, the feasibility of different options will depend upon how the transition into a new model can be organised. Change takes time and requires extensive stakeholder engagement and investment. An option that is desirable in the long term may not be feasible to implement immediately.

In addition to these specific criteria, the stakeholder interviews confirm that the majority of the options that can potentially be put forth will face the issue that improving Music Education Services and equity of access ultimately depends upon somebody paying for it. There are therefore two further key issues that need to be addressed:

- **Money:** Any option will need to either have access to additional funds/resources that can be used to enhance current provision or have a lever with which to influence local decision making with regard to the allocation of resources. Beyond the question of the cost and source of funding, the long-term financial stability of any new delivery model was a key concern in virtually all exchanges undertaken with stakeholders for this study.
- **Strategic direction & decision making:** In order to deliver value for money and make the most of scarce resources, any option will need to provide clarity as to how strategic direction can be introduced into music education for Wales as a whole.

7.2 Options Without a National Body

Two main options can be identified that would operate without national coordination or strategic integration.

Option 1: The status quo – a disparate service which is gradually shrinking with loose coordination

Option 1 – The status quo	
Nature of provision	<ul style="list-style-type: none"> • Continuation of the current model of local-authority-led service provision in the face of many local authorities considering further reductions/withdrawal from providing a service; • Elements of alternative provision emerging to fill the gap created.
Key assessment criteria	
A sustainable workforce	<ul style="list-style-type: none"> • Employment status for music teachers varies; • No standardised T&Cs for employment; • No clear qualification framework and teachers are largely expected to take care of their own CPD.
Equality of access	<ul style="list-style-type: none"> • Variations in the level of subsidy across LAs;

	<ul style="list-style-type: none"> • Variations in the level of costs that learners are expected to contribute; • Evidence of limited attention to allocating resources in line with clear objectives (e.g. regarding equality of access); • Pupil Development Grant providing some leeway to address equality of access, but with limited scope and flexibility.
<i>Progression up 'Welsh pyramid'</i>	<ul style="list-style-type: none"> • Progression to national ensembles are likely to become less equitable over time (because levels of subsidy are likely to shrink further with coordination depending upon standalone local arrangements).
Mechanisms & activities to organise delivery	
<i>Quality assurance regime</i>	<ul style="list-style-type: none"> • Limited supervision of music tuition by some Music Education Services; • Limited quality control for schools buying into the service; • QA capacity being eroded as a result of cutbacks.
<i>Contractual relationships</i>	<ul style="list-style-type: none"> • Schools predominantly entering into contracts with individual providers (local authority Music Education Service or other provider); • Contracts largely focused upon the volume of provision and payment terms with limited quality criteria or specific outcomes.
<i>The role of schools</i>	<ul style="list-style-type: none"> • Schools as main 'customers' of local authority Music Education Services and alternative providers emerging in the marketplace; • Purchasing decisions depending upon headteachers' understanding of and stake in music education, and in competition for resources with other provision.

Overarching model architecture	
<i>Governance framework & strategic direction</i>	<ul style="list-style-type: none"> • Loose coordination through non-binding exchanges under the umbrella of Cymdeithas Addysg Gerdd Awdurdodau Cymru/Welsh Authorities Music Education Association, the local authority Music Services subcommittee of the Association of Directors of Education in Wales (CAGAC); • Co-operatives and private suppliers not represented in CAGAC; • Continuing budgetary cuts leading to a continued reduction in service and further fragmentation.
<i>Integration of national/local provision</i>	<ul style="list-style-type: none"> • Regular CAGAC meetings but few levers to stimulate/encourage/enforce consistency; • No representation/integration of co-operatives and private suppliers, or regular representatives from authorities without a Music Service.
<i>Source of funding</i>	<ul style="list-style-type: none"> • Without some form of intervention, stakeholder expectation is for a continued drop in funding from local authorities still financially supporting Music Education Services; • School budgets; • Tuition fees paid by parents/guardians.
<i>Organisational form</i>	<ul style="list-style-type: none"> • Local authorities coordinating provision, with some employing tutors, some subcontracting freelance tutors and some leaving actual provision entirely to independent organisations;

	<ul style="list-style-type: none"> • New organisational forms emerging in some local authority areas (including a co-operative, charitable structures) contracting directly with schools; • Effectively competing with local authority Music Services, including across administrative boundaries.
Transition into new delivery model	n/a
Pros	<ul style="list-style-type: none"> • Requires little intervention from Welsh Government; • Low cost.
Cons	<ul style="list-style-type: none"> • Current situation widely seen as unsustainable; • Gradually shrinking, disparate service; • Seen as unfair because of no national consistency; adequate provision for progression up the 'Welsh pyramid' or equality.

Option 2: Allowing the market to determine provision

Option 2 – A complete free-for-all	
Nature of provision	<ul style="list-style-type: none"> • Ongoing pressure upon budgets likely to lead to more authorities cutting funding for Music Services; • Provision increasingly reliant upon individual teachers or independent organisations offering services.
Key assessment criteria	
A sustainable workforce	<ul style="list-style-type: none"> • Independent self-employed music tutors, private companies and social enterprises likely to increasingly provide services directly to parents and schools; • No Welsh Government and strategic stakeholder influence over entry criteria and workforce quality/sustainability.
Equality of access	<ul style="list-style-type: none"> • Not guaranteed by the market; • Likely that Welsh Government would choose to impose a requirement/make a targeted investment in addressing the greatest market failures, e.g. funding provision for disadvantaged learners.
Progression up 'Welsh pyramid'	<ul style="list-style-type: none"> • Not guaranteed by the market; • Likely that Welsh Government would choose to impose a requirement/make a targeted investment in addressing the greatest market failures, e.g. providing funding for regional ensembles set up to allow for progression to national ensembles.
Mechanisms & activities to organise delivery	
Quality assurance regime	<ul style="list-style-type: none"> • Would be left to the market, with schools and/or parents making choices on the basis of quality/cost perceptions; • Few levers for Welsh Government and strategic stakeholder role in quality control.
Contractual relationships	<ul style="list-style-type: none"> • Dictated by the market (e.g. not possible to introduce pricing controls); • Risk of some areas with no provision because it is not economic to provide.

<i>The role of schools</i>	<ul style="list-style-type: none"> • An even greater role in making market-based choices; • With continuing cuts, budgets for music education would be further eroded; • Where in-house music expertise is lacking, likely to struggle to find appropriate support for curriculum-based provision.
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Overarching model architecture	
<i>Governance framework & strategic direction</i>	<ul style="list-style-type: none"> • No intervention to channel resources and ensure provision in line with strategic objectives; • Scarce resources allocated by the market; • No consistency in the offer in different parts of Wales.
<i>Integration of national/local provision</i>	<ul style="list-style-type: none"> • Continuing the current trend, national and local charities increasingly relied upon to provide musical experiences without coordination of provision.
<i>Source of funding</i>	<ul style="list-style-type: none"> • Welsh Government funding to address the greatest market failures, potentially delivered via existing organisations or through schools (e.g. formula based on eFSM numbers, ringfenced supplement to the Pupil Development Grant); • Alternatively, a competitive bidding process for services in defined geographical areas.
<i>Organisational form</i>	<ul style="list-style-type: none"> • Private firms, social enterprises and local authority Music Services offering services independently; • With the demise of central services, a potential for new local organisations to be set up by schools, parents and tutors and/or private businesses to ensure minimum provision; • New organisations might struggle to find appropriate support.
<i>Transition into new delivery model</i>	<ul style="list-style-type: none"> • Effectively already in place in parts of Wales; • Direction of travel elsewhere.
<i>Pros</i>	<ul style="list-style-type: none"> • Requires little intervention from the Welsh Government; • Mechanisms to make music education available to those who can afford it are likely to emerge; • Organisational capacity available to deliver targeted funding programmes to address the greatest market failures (i.e. disadvantaged learners and/or progression up the 'Welsh pyramid').
<i>Cons</i>	<ul style="list-style-type: none"> • Likely to result in prioritising music education for learners from affluent backgrounds; • Does not meet stakeholder expectations for equitable provision of music education as an important public good; • Potentially threatening music tutoring as a sustainable career choice; • Likely that WG would have to impose some requirement for equality of access/progression without addressing the overall coherence of provision;

- Funding for the minimum intervention would need to be found/administered separately from current local authority funding mechanisms, adding to the complexity of the system;
- If overarching funding arrangements are changed (e.g. hypothecating funding for music education), likely to meet considerable political resistance.

7.3 Options 3, 4 and 5 – What Should Be Done Nationally?

The stakeholder research undertaken for this study suggests strong support for a degree of national coordination and strategic integration. This contradicts, to some extent, the conclusion presented in the final progress report in 2019 of the Task and Finish Group ‘that Music Services were best managed on a local level’.

However, the report also recognised that considering the feasibility of ‘different options for the future delivery of Music Services and consideration of a national plan for Music Education [partly] enhances the work of the task and finish group recommendations and provides a further route for considering music provision across Wales to ensure future plans are sustainable and meet the needs of all learners in Wales’. This sentiment was strongly echoed in discussions with CAGAC members who appeared to recognise that stronger national coordination might address some of the local pressures and the threats to provision, and who would welcome a process of working towards greater parity of provision throughout Wales.

The stakeholder interviews were almost unanimous in agreeing with the suggestion of the Culture, Welsh Language and Communications Committee that a National Plan for Music Education is required.

The following options are therefore based upon the assumption that a National Plan, which, by definition, requires a function that coordinates strategic developments and activities in the different parts, a ‘national body’ of some description, is effective. The following text box outlines how such a national coordinating function might work.

What would a National Service do?

Consistency and coherence of Music Education Services throughout Wales require national intervention. Activities to this end which could be delivered on a national basis are as follows:

- Providing oversight
- Implementing a National Plan for Music Education
- Implementing a national pricing structure
- Implementing national pay and conditions for tutors, including specified CPD
- Implementing a quality framework
- Protecting access for disadvantaged learners
- Providing a clear pathway for musically talented pupils to proceed to national ensembles
- Coordinating marketing of the service to parents and schools

- Providing consistent, clear guidance from the Welsh Government to schools and the wider public as to the benefits of music
- Implementing a coherent, easy-to-use payment system for schools and parents
- Providing a standardised product

There would still need to be local delivery of services at a local authority and/or regional level. This could be by commissioning services or employing staff to work with schools with individual tutors, and could ensure the existence of local authority and regional ensembles.

From the research that we have undertaken, schools and, to some extent, parents/guardians are the ultimate decision makers regarding how and whether music education is provided.

Funding

The Welsh Government will need to decide upon the appropriate level of funding.

How can this be made to happen?

The Welsh Government could legislate. Alternatively, the Welsh Government could exert control by setting strong Terms of Reference for either a national body or regional bodies within its funding agreements. In commissioning services, high standards could be specified in relation to quality control, terms and conditions for music tutors, DBS checks, minimum qualifications, and Education Workforce Council registration. This would implement coordinated Wales-wide services.

We would suggest a call-off framework model for commissioning, according to which organisations or individuals apply to be on an approved list for schools or local authorities to obtain services. Frameworks could be for:

- Musical experiences in schools;
- Music instrument and voice tuition;
- Provision of ensembles at the school, local authority and regional level;
- Ancillary services (e.g. CPD for teachers, booking and payment systems, instrument hire, etc.).

Providers could be:

- Local authority Music Services if they choose to continue to retain this as in-house provision, using the unhypothecated Revenue Support Grant as they do now or by retaining a self-funding Music Service;
- Charities on a local or national basis;
- Co-operatives or other social enterprises;
- Private-sector companies;
- Individual music tutors.

Schools could be strongly advised to use the call-off framework. They would, as now, use:

- Their delegated budgets if they so choose;
- The non-hypothecated Pupil Development Grant if they can meet its guidelines;
- Fees from parents/guardians;
- Funding from the Welsh Government either directly or via local authorities.

Parents/guardians would, as now, be free to make their own arrangements with any provider that they like outside of school hours. They would, however, have access to the providers in the framework, which would provide reassurance of quality.

Options 3, 4 and 5 are all based upon the assumption that a national coordination function is in place and that framework contracts are used to commission and oversee delivery. The three options therefore share a number of key characteristics which are set out jointly for all three options below.

Differences exist between the three options in terms of:

- The overarching model architecture;
- The financial structures and mechanisms;
- The approach to organising the transition; which influence
- Their feasibility and desirability.

These are therefore considered separately for each option in a second set of tables below.

Options 3, 4 and 5 – National coordination	
Nature of provision	<ul style="list-style-type: none"> • National body would set standards and coordinate provision through framework contracts; • Actual provision still delivered by organisations on the ground (including current local authority Music Education Services, other current providers, and potential new entrants); • National plan in combination with framework contracts would define the nature and volume of services to be commissioned in line with clear objectives and outcomes; • Aiming to offer a combination of: <ul style="list-style-type: none"> ▪ Regular services (e.g. CPD for teachers, music tuition, instrument hire, local and regional ensembles) drawing upon local needs assessments; ▪ Services designed to fill particular gaps (e.g. rare instruments, piloting of innovative services using technology/delivered in settings that may be more attractive to groups who do not engage with conventional music tuition); ▪ Ancillary services (e.g. booking and payment systems, quality control).
Key assessment criteria	
A sustainable workforce	<ul style="list-style-type: none"> • Opportunity for music teachers to make informed career choices based on clarity in relation to the nature of delivery, clear qualification standards, and enabling fair competition between different providers; • Level playing field empowering music teachers to collectively engage in the market for Music Services (e.g. through setting up co-operatives);

	<ul style="list-style-type: none"> • Evolving infrastructure allowing the development of clear business models and the allocation of resources to different functions (i.e. management, actual provision, potential for cross-subsidisation between services with different 'margins'), enabling longer-term career choices; • Accreditation systems for individuals and sole traders could further ensure clarity and consistency for music tutors.
<i>Equality of access</i>	<ul style="list-style-type: none"> • Mechanism for equality of access embedded in framework contracts (e.g. issuing separate contracts for heavily subsidised music tuition services for eFSM pupils and/or KPIs regarding the mix of pupils receiving tuition or relevant outcomes); • Secured through: <ul style="list-style-type: none"> ▪ Cross-subsidisation in provider business models; ▪ Allocation of dedicated funding; ▪ Incentivising providers to engage a wide cross section of pupils (e.g. offering a wider selection of musical genres, delivering music education outside of the school environment, etc.). • Schools to be strongly advised to use the call-off framework, using: <ul style="list-style-type: none"> ▪ The Pupil Development Grant if they can meet its guidelines; ▪ Their delegated budget, which could be supplemented by further Welsh Government funding.
<i>Progression up the 'Welsh pyramid'</i>	<ul style="list-style-type: none"> • Separate services commissioned to ensure identification of and progression for musically talented pupils; • Structuring of framework contracts through different lots inviting service packages integrating musical experiences, general music tuition, and the provision of ensembles at the school, local authority and regional level.
Mechanisms & activities to organise delivery	
<i>Quality assurance regime</i>	<ul style="list-style-type: none"> • Nationally agreed quality criteria and outcome requirements; • Governed by contractual relationships (e.g. use of KPIs, reporting relationship) with providers.
<i>Contractual relationships</i>	<ul style="list-style-type: none"> • Nationally agreed framework contracts to procure services locally.
<i>The role of schools</i>	<ul style="list-style-type: none"> • Continue to buy services from a preferred supplier.

Option 3: A strong national coordinating body including local authorities/co-operatives/charities/private providers

Option 3 – A strong national coordinating body including local authorities/co-operatives/charities/private providers	
Governance framework & strategic direction	<ul style="list-style-type: none"> • A national coordinating body (as opposed to a delivery body) involving all providers, including current CAGAC membership, to provide national coordination for local services; • Could be set up formally as a charity or secondary co-operative, with local authorities (where they still choose to provide services), headteachers, co-operatives, charities, private companies, and representatives of individual tutors as members; • To be governed by a Board (of 12 at the most, elected from the members), elected by defined groups (e.g. local authorities, charities/co-operatives, private companies above a certain size, individual tutors, headteachers), able to co-opt additional members and an independently recruited Chair; • Framework contract in combination with the National Plan as a strategic lever for the Welsh Government (in partnership with a national coordinating body) to stimulate innovation and identify opportunities to address market failures.
Integration of national/local provision	<ul style="list-style-type: none"> • Local provision not immediately affected, with all existing providers free to continue to offer their services in the marketplace; • Stronger regulation of the market for Music Services; • Contractual requirements stimulating politically desirable developments in relation to the nature, quality and balance of provision.
Source of funding	<ul style="list-style-type: none"> • Welsh Government funding for Music Services; • Tuition fees paid by parents/guardians; • Potentially additional grant funding to be levered in by individual providers (stimulated by greater freedom to develop and market a wider range of services); • Potentially additional targeted funding for equality of access.
Transition into new delivery model	<ul style="list-style-type: none"> • Strong facilitation and change management support required to enable a true departure from current practices and create a robust new framework for Music Education Services through the framework contracts; • Developing a National Plan for Music Education endorsed by key stakeholders is an important first step in ensuring that national consistency/coherence can be achieved through the management of framework contracts by a national coordinating body.
Pros	<ul style="list-style-type: none"> • Would provide a body to receive Welsh Government funding;

	<ul style="list-style-type: none"> • Opportunity for pooling of funding and more clarity regarding the allocation of funding to different types of Music Education Services/outcomes (e.g. cross-subsidisation of higher costs in rural areas); • Potential economies of scale⁵³ for some functions (e.g. CPD for teachers, developing tools to incorporate digital technology into music tuition, quality assurance functions) included in the Terms of Reference developed by the Task and Finish Group (Appendix 1) through commissioning in lots covering wider geographical areas; • Strong democratic element with stakeholders working collectively; • Considerable continuity through current providers in the driving seat in working towards national consistency combined with strong facilitation and change management support; • Provides a platform for the Welsh Government to work with stakeholders in setting strategic direction and stimulating innovation in service provision.
Cons	<ul style="list-style-type: none"> • The most expensive option because of the need to operate at the local authority level, plus the National Director/office; • A danger that it could be dominated by local authorities or by those elected by a large number of tutors — great care required in setting up a fair governance structure for a formal membership body; • Potential conflict of interest for existing providers as part of the governance structure overseeing framework contracts and competing for the delivery of services under frameworks; • Potential new providers/organisations/innovative services (that the framework contract model is designed to stimulate) not represented in the national body would further exacerbate potential conflicts of interest; • Marked differences in current patterns of provision and the allocation of resources at the local level (e.g. very different levels of subsidy for music tuition, different remuneration scales for Music Services staff, different terms and conditions for music teachers) difficult to overcome (e.g. because of transitioning to higher fees where the level of subsidy currently high is difficult); • Formidable obstacles to the national coordination function composed of existing providers through existing tensions (e.g. 'baggage' from previous local authority collaboration; perceived challenge to independence of local authority functions; independent organisations being seen as unfair competition); • National organisations with an outreach remit not directly involved, despite the willingness expressed to engage in the strategic coordination and integration of their activities (e.g. musical

⁵³ Some local authorities are already taking advantage of such economies of scale; for instance, Gwent Music already caters to the Newport, Blaenau Gwent, Monmouthshire, and Torfaen local authority areas.

	<p>experiences, CPD for music teachers) in the holistic plan for music education in Wales;</p> <ul style="list-style-type: none"> • Important additional economies of scale (e.g. through central payment and booking systems) not taken advantage of without national coordinating body capacity to deliver such functions.
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Option 4: A regional model with a national coordinating body

Option 4 – A regional model with a national coordinating body	
<i>Governance framework & strategic direction</i>	<ul style="list-style-type: none"> • Four regional Music Hubs with a common governance structure, probably set up as charities (e.g. using boundaries of existing Regional Consortia); • Hubs to commission Music Services for schools within geographical areas from existing providers; • Trustees potentially selected by the Welsh Government/local authorities through the use of standard public-body appointment processes; • Regional stakeholder groups created to advise upon local issues; • National activities to be carried out by four hubs working together to develop national approaches; • Terms of Reference developed by the Task and Finish Group to form the basis of a framework; • Framework contract (in combination with the National Plan for Music Education) provides a strategic lever for the Welsh Government (working in partnership with four regional hubs) to stimulate innovation and identify opportunities to address market failures.
<i>Integration of national/local provision</i>	<ul style="list-style-type: none"> • Important to avoid a fundamental error of the English Hub model, i.e. allowing hubs to directly deliver services — regional hubs should not directly deliver Music Education Services; • But regional hub organisations should have the organisational capacity to deliver/directly commission centralised ancillary services (e.g. central booking and payment systems) to facilitate the process of delivering music tuition to schools; • Current providers (including existing Music Education Services) to be encouraged to be part of call-off frameworks and continue to deliver services locally.
<i>Source of funding</i>	<ul style="list-style-type: none"> • Welsh Government funding for Music Services; • Tuition fees paid by parents/guardians; • Potentially additional grant funding to be levered in by individual providers (stimulated by greater freedom to develop and market a wider range of services);

	<ul style="list-style-type: none"> • Potentially additional targeted funding for equality of access.
<i>Transition into new delivery model</i>	<ul style="list-style-type: none"> • Opportunity to make good use of existing skills and experience in the context of a refreshed strategic and delivery framework; • Possible to consider TUPE arrangements for existing Music Service staff to create organisational capacity for regional hubs; • Developing a National Plan for Music Education endorsed by key stakeholders is an important first step in ensuring that national consistency/coherence can be achieved through the management of framework contracts by a national coordinating body; • Agreement needed with local authorities that this is the best way to deliver music education in Wales and that funding for music education should be separated from current funding arrangements for local authorities.
<i>Pros</i>	<ul style="list-style-type: none"> • Would provide bodies to receive Welsh Government funding; • Opportunity for pooling of funding and more clarity regarding the allocation of funding to different types of Music Education Services/outcomes (e.g. cross-subsidisation of higher costs in rural areas); • Regional model based on a Regional Education Consortia footprint offers economies of scale over existing local authority delivery; • National consistency/coherence through four hubs collectively 'owning' a National Plan for Music Education; • Degree of independence from the constraints of local authority pressures through independent regional entities; • Charity governance structures provide a direct link to local decision making, addressing stakeholder concerns over the lack of local knowledge and accountability; • Combination of regional hubs and a national body offers structure to ensure the provision of music education remains responsive to new developments in terms of emerging needs (bottom-up) and new strategic opportunities (top-down); • Regional organisations with the capacity for central coordinating functions make services more attractive to schools than standalone services (as in Option 3); • Provides a platform for the Welsh Government to work with stakeholders in setting strategic direction and stimulating innovation in service provision; • Combination of regional and national governance structures provides a greater opportunity for national organisations with an outreach remit to be directly involved in shaping delivery and leveraging their assets.

Cons	<ul style="list-style-type: none"> • Additional complexity — administratively and politically — in comparison to a single national layer through integrating regional accountability with national coordination; • Local authorities likely to contest the decision to allocate Welsh Government funding directly to the regional hubs (rather than through current arrangements); • Additional complexity in the governance structure, with four regional offices, also reflected in additional costs; • A danger that the current fragmentary system is replicated in four disparate systems (rather than consistency/coherence).
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Option 5: A wholly national service

Option 5 – A wholly national service	
Governance framework & strategic direction	<ul style="list-style-type: none"> • Welsh Government lead in working with stakeholders to develop a National Plan for Music Education in Wales; • Commissioning of an external organisation to deliver the objectives set out in the plan (an existing national organisation or a new ‘arm’s-length’ body with funding from the Welsh Government); • Active role in ensuring local delivery by procuring a clearly defined package of Music Education Services from delivery organisations at the local authority or regional level; • If new body governance could be a charity (easier to attract extra funds for projects/claim Gift Aid), a company limited by guarantee; • Possible to have Boards wholly or partially appointed by the Welsh Government under standard recruitment terms for ‘arm’s-length’ bodies, and some Trustees/Board Members appointed by other interested parties; • Regional and local accountability through regional advisory stakeholder groups.
Integration of/with local provision	<ul style="list-style-type: none"> • National body to directly manage the call-off framework and contracts for specific delivery; • Current providers (including existing Music Education Services) to be encouraged to be within call-off frameworks/continue to deliver services.
Source of funding	<ul style="list-style-type: none"> • Welsh Government funding for Music Services; • Tuition fees paid by parents/guardians; • Potentially additional grant funding to be levered in by individual providers (stimulated by greater freedom to develop and market a wider range of services); • Potentially additional targeted funding for equality of access.

Transition into new delivery model	<ul style="list-style-type: none"> • Developing a National Plan for Music Education endorsed by key stakeholders is an important first step in ensuring that local stakeholders are fully on board with the approach to achieving national consistency/coherence; • Agreement needed with local authorities that this is the best way to deliver music education in Wales and that funding for music education should be separated from current funding arrangements for local authorities.
Pros	<ul style="list-style-type: none"> • Would provide a body to receive Welsh Government funding; • Opportunity for pooling of funding and more clarity regarding the allocation of funding to different types of Music Education Services/outcomes (e.g. cross-subsidisation of higher costs in rural areas); • Clear national accountability in the context of a single National Plan for Music Education in Wales; • Clear, simple quality control mechanism; • Economies of scale in comparison to more distributed structures;
Cons	<ul style="list-style-type: none"> • Unclear whether/how any existing organisation is equipped to provide and maintain the collective strategic impetus required to put music education in Wales on a fresh footing; • Difficult for a central organisation to remain responsive to emerging needs and developments at the local level; • Could easily be seen as a remote top-down solution unable to stimulate innovation and encourage the emergence of different offers and providers; • Possibly too monolithic to nurture the vibrant music education environment in Wales (e.g. different musical genres, diverse organisations/settings contributing to shared objectives).

7.4 Where Would Funding Come From?

Public funding

In the interviews undertaken for this study, stakeholders widely supported the need and case for public funding to be made available for music education. This is usefully illustrated by one comment which suggested that *‘there is no getting away from the need for money. However, in view of the enormous economic imperative (e.g. Brit Awards), funding for music education should be made available.’*

Currently, there is an allocation for Music Services in the local authority Revenue Support Grant. This grant is not hypothecated, and several local authorities have chosen to spend this on other activities because Music Services are not a statutory service. The Welsh Government has allocated £1.5 million to Music Services via the WLGA in 2018/19 and 2019/20.

Private market – parents/guardians

The Welsh Government published Guidance for Governing Bodies on Charging for School Activities in 2015, which summarises the statutory position regarding the possibility of charging for Music Services:

‘Although the law states that all education provided during school hours must be free, music lessons are an exception to this rule. Schools may charge for musical instrument tuition provided to individual pupils, or to a group of not more than four pupils, if the teaching is not an essential part of either the National Curriculum or a public examination syllabus being followed by the pupil.’⁵⁴

In principle, it would therefore be possible to move to a situation in which a larger proportion of the cost of Music Education Services is paid for by parents. For this to be a viable funding route, parents must be convinced that music tuition, be it instrument or voice tuition, is worthwhile, and that music is something that is worth their child dedicating time and effort to.

Experience on the ground suggests, certainly in the short term, that it would be challenging to migrate to a system in which parents contribute a more substantial share of the cost of music education. ‘Where free provision is what parents are used to, it becomes nigh on impossible to start charging. In Gwent, for instance, the Music Service has tried charging in Blaenau Gwent (seeing that Monmouthshire has a system of 100% of provision being paid for) but had to abandon this because numbers were dropping so sharply.’ (Head of Music Service)

Anecdotal evidence further suggests that schools’ own choices are influenced by a lack of parental support for music tuition in particular, with one Music Service respondent quoting a headteacher as suggesting that ‘there is no demand from parents for instrument tuition’ and, on these grounds, not using the Music Education Services on offer.

Wider research on the matter further indicates that without additional work in order to raise the profile of music education and promote its value, additional parental contributions are unlikely to fill the funding gap. Research by the Music Commission suggests that it cannot be taken for granted that parents will recognise the value of music and support their children in pursuing music — both with encouragement and financially. They suggest that *‘targeted support for parents throughout their child’s musical learning is likely to have a significant impact on their motivation to support and commit resources to their child’s progress in music.’*⁵⁵ Relying upon parents to make a contribution towards music tuition that could replace public subsidy is therefore unlikely to offer an alternative funding route unless and until the value of music is communicated effectively.

⁵⁴ [Guidance for Governing Bodies on Charging for School Activities](#)

⁵⁵ Music Commission (2019), *Retuning our Ambition for Music Learning, Every Child Taking Music Further*.

Fundraising and grants

A further option worth considering for additional funding for Music Education Services available is that of fundraising and the use of grants.

Several of the music experience programmes currently being delivered in Wales use grant funding (e.g. Welsh National Opera's Jane Hodge Foundation supported the Youth & Community programme⁵⁶).

In England, Music Hubs have developed business models that are guided by commercial disciplines that maximise the income, strategic positioning and competitive pricing of services. Moreover, they lever their status as charities in order to undertake direct fundraising from the public⁵⁷. Arts Council England (ACE) is planning to develop crowdfunding projects to support England's Music Education Hubs (MEHs), as well as to match the money raised with its own funds from a ringfenced budget⁵⁸.

In Wales, charging a new delivery model with securing grants and fundraising would place it in direct competition with existing organisations that rely upon such funding streams. Most notable is what would be an immediate conflict of interest with Anthem as the new music fund for Wales, which is in the process of raising finance in order to be able to make grants to refine and develop music education in Wales in the coming years. Similarly, National Youth Arts Wales is only partly funded through the Arts Council and relies for additional monies upon a fundraising strategy from trusts and foundations.

At the same time, the organisational infrastructure for the delivery of music education on the ground in Wales is not equipped to adopt a fully commercial approach like the one used by the English Music Hubs.

8 Conclusions

The brief for this feasibility study was concerned with identifying and assessing options for the future delivery of Music Services in Wales. It was to consider existing methods of delivery of education services across Wales, identify best practice, consider alternative models in line with the needs and demands for such services, and consider the feasibility of the options available. A particular focus rested upon considering whether or not responsibility for delivery should be transferred to a single national 'arm's-length' body, presenting options for what form this body should take and considering whether or not a National Plan for Music Education should be prepared.

The feasibility study built upon a large body of existing work that had been undertaken in Wales, notably by the Task and Finish group on Music Services in Wales, which was set up by the then-Minister for Education and Skills and the National Assembly for Wales Culture, Welsh Language and Communications Committee's inquiry into funding of and access to music education. While this work had identified the same key challenges surrounding the lack of consistency and coherence in the provision of Music Education Services in Wales,

⁵⁶ [Hodge Foundation - WNO Youth & Community programme](#)

⁵⁷ Music Mark (2019), Developing Organisational Resilience, A Guide for Music Education Hubs.

⁵⁸ [Arts Professional Website](#)

conflicting conclusions were drawn from the findings. An important aim of this feasibility study, therefore, was to develop a more detailed understanding of the implications of and requirements for stronger national coordination of the delivery of Music Education Services.

Stakeholder views and the recurring calls for greater coherence and better coordination suggest that there should be a National Plan for Music Education in Wales. Such a plan would need to be owned by key stakeholders in Wales and used to embed a number of principles and aspirations in the development of Music Education Services in Wales in going forward. A blueprint for such a plan is set out in the report in order to offer an initial discussion template for stakeholders in Wales.

Alongside current providers and individual music tutors, key stakeholders crucially include schools that have an essential role to play in making music education accessible for learners in Wales. Feedback from current Music Education Service representatives suggests that cost and the relative interest in music education on the part of headteachers are important determinants of curriculum-based provision and the use of Music Education Services. Reaching decision makers at the school level and engaging them in this debate will be vital in strengthening music education in Wales. Additional research should therefore be undertaken with schools in order to test the different options and understand how they can effectively be engaged in achieving outcomes in relation to music education.

The Welsh Government has a number of levers at its disposal for influencing and helping to shape the provision of music education in Wales. Strategic collaboration with key stakeholder organisations is essential, alongside direct Welsh Government levers such as funding (e.g. additional targeted funding), legislation (e.g. statutory guidance to accompany the new curriculum), and specific delivery mechanisms (e.g. quality control mechanisms, a qualification framework for music teachers, the use of KPIs in contracts). All of these provide opportunities for individual interventions or can be deployed as part of an overarching delivery model.

Five possible options for such a delivery model, with some being more desirable than others, are outlined in this report:

1. The status quo — a disparate service which is gradually shrinking with loose coordination, based upon local authority provision
2. Allowing the market to determine provision
3. A strong national coordinating body run by providers, including local authorities/co-operatives/charities/private businesses, and individual tutors; this would be an extension of CAGAC (Cymdeithas Addysg Gerdd Awdurdodau Cymru/Welsh Authorities Music Education Association), which is a subcommittee of ADEW (Association of Directors of Education in Wales), forming a more representative formal body
4. A regional service with a national coordinating body
5. A national service

Each option is discussed in terms of a consistent set of criteria and considerations. The stakeholder interviews confirm that the majority of the options that can potentially be put forth will face the issue that improving Music Education Services and equity of access ultimately depends upon somebody paying for it. The choice of an option will therefore, to some extent, be determined by the availability of funding with which to support a new infrastructure and enhanced provision.

The two options without a national body — the status quo and allowing the market to determine provision — require very limited intervention or additional funding. However, they are unlikely to overcome current issues surrounding consistency and coherence and, in particular, limited equity of access, sustainability of the workforce, and appropriate progression routes for talented pupils.

All of the three options with a National Plan and a national coordinating body introduce a way of pooling and providing coherence to the use of governmental funding for Music Education Services while creating different kinds of fora for stakeholders to play a role in making decisions regarding the development and delivery of Music Education Services. They vary with regard to the balance between local accountability and national coordination.

The use of framework contracts is put forth as a key mechanism with which to create an effective link between the National Plan, wider debates surrounding the nature of Music Education Services, and delivery on the ground.

Where additional funding is required for any of the options, limited funding routes other than using public funding are likely to be available.

Developing a National Plan for Music Education that is endorsed by key stakeholders is an important first step in ensuring that national consistency and coherence can be achieved. It will therefore be important to initially test the options as put forth in this report with all key stakeholders.

Conclusions

- The development of a National Plan for Music Education should be considered.
- The Welsh Government should consider whether a new organisation is required in order to develop and deliver the plan. The suggested options should be tested with strategic stakeholders and providers of Music Education Services.
- Schools are the key decision makers in how music education is delivered. Further research should be considered in order to examine how they make this decision and what factors they consider.
- The sustainability of the music tutor workforce is a cause for concern. Further work should be considered so as to gain the views of music tutors regarding their terms and conditions.

Appendix 1. Task and Finish Group – Terms of Reference for Music Services in Wales

Music Services should offer provision to all schools in their area so that all children and young people have the opportunity to learn to play and sing. Schools, supported by local authority Music Services, are at the heart of instrumental and vocal music tuition.

In relation to instrumental and vocal music tuition, local authority Music Services are expected to:

- meet schools' needs in respect of the range and quality of services;
- meet learners' needs for high-quality, affordable group/individual tuition in a range of instruments, as delivered by trained staff;
- support school music departments in providing high-quality extracurricular provision, including ensemble and other performance opportunities;
- provide opportunities for progression as well as access to advice and support for learners wishing to develop their skills;
- support learners in preparation for music examinations;
- work with schools in developing fair and consistent charging policies and systems;
- have partnership working at the heart of their operations, and participate actively in developing new partnerships;
- offer consistency of provision across a region, coterminous with the Regional Education Consortia regions;
- have quality assurance systems in place and be required to develop consistent pay and conditions;
- provide training to ensure that staff are up to date with changes in current education policy and practice;
- work at a regional and a national level to ensure the most cost-effective options for musical instrument supply;
- collaborate within and across regions to share printed music resources; and
- where relevant, incorporate the use of digital technology to improve tuition outcomes.

In addition, and particularly in the context of future changes in the National Curriculum, local authority Music Services could be expected to:

- support generalist class teachers and non-specialist practitioners in delivering the requirement of the National Curriculum to all learners, taking good account of best practice and research findings in order to make effective use of their own skills and expertise;
- support teachers who are new to the profession in developing their confidence in delivering music lessons to their classes;
- support schools in promoting whole-school singing and musical performances of a high quality.

Appendix 2. The National Music Plan for England

Music in the curriculum

The *State of Play* report published by the Musicians' Union in 2019 (supported by the Music Industries' Association, Music for All, and UK Music) collected data from over 1,000 teachers, Music Services, schools, and headteachers, and was followed up by 42 one-to-one telephone interviews. It summarises the overall position of music education in England and is the main point of reference in this snapshot of music education in England.

Prior to reforms by the coalition government from 2010 onwards, schools in England were required to meet statutory demands set by the National Curriculum. This legal framework had, for the previous 25 years, provided a coherent plan for students' access to and progression in music education. It outlined, in principle, what a 'broad and balanced' curriculum should contain as a basic entitlement for students.

The situation today, however, is very different. The 'watering-down' of the National Curriculum by Education Minister Michael Gove MP, the 'academisation' of schools and the promotion of Free Schools (both of which are not required to follow the National Curriculum), and significant budgetary cuts have significantly weakened the place of music in the educational experience of young people. Schools now have the freedom to design and implement their own curricular arrangements, with few checks and balances in place to ensure that children are receiving a broad and balanced curriculum. In addition to this, preoccupation with the English Baccalaureate (96% of teachers responding to the MU's *State of Play* research stated that the EBacc had had a negative impact upon music), league tables, and performance measures (directly affecting teachers' pay), it is unsurprising that music has become a minority subject. Indeed, some schools have removed GCSE Music from the curriculum altogether, relegating it to an extracurricular course for which parents pay (<https://www.tes.com/news/how-can-it-be-2018-pupils-are-having-pay-study-music-gcse>). In turn, the study of A-Level Music has dropped by 25.4% since 2014 (JCQA 2018).

The crisis in relation to music in the primary curriculum was highlighted over 20 years ago and has since been compounded by the government's policy of emphasising 'core' subjects such as literacy and numeracy. Consequently, this has influenced the decline of music in secondary schools. Research involving 700 state schools across England, which was conducted by the University of Sussex (2019), reported that timetabling arrangements for music had shifted dramatically. Carousel teaching across Key Stage 3 (in which students study music for only one term in rotation with other subjects) was prevalent, with the worst example being where music was offered for only 25 minutes per week over a six-week period or, in other words, 2.5 hours across the entire academic year.

Furthermore, the University of Sussex report revealed that the average number of full-time (or equivalent) classroom music teachers had also declined significantly. The number of music departments staffed by a **single** teacher increased from 22% in 2012/13 to 30% in 2016/17. The *State of Play* report revealed that the average number of music teachers per secondary school constituted 1.47.

Instrumental music

In terms of instrumental music, the responsibility for provision has shifted from local authorities to Music Hubs, directly funded (currently £75,840,000 per annum based on a per-pupil formula) by the Department for Education via Arts Council England. Music Hubs were formed in 2011 as part of the National Plan for Music Education (NPME) (soon to be revised). A total of 123 Music Hubs were formed, many of which were existing LA Music Services, although some were private trusts or agencies.

The NPME had four primary aims:

- To ensure that every child aged 5 to 18 had the opportunity to learn, ideally for a year (or a minimum of one term), a musical instrument (other than voice) through whole-class ensemble teaching
- To provide opportunities to play in ensembles and perform from an early stage
- To ensure that clear progression routes were available and affordable to all young people (note: one third of all 7–10-year-olds state that they play an instrument, but only a quarter are continuing to play at the age of 16 or 17 — Youth Music Survey by Ipsos MORI)
- To develop a singing strategy to ensure that every pupil sings regularly, and that choirs and other vocal ensembles are available in their area

In relation to these core activities, the Arts Council's Music Education Hubs report (2017) (produced by Prof. Martin Fautley and Dr. Adam Whittaker) highlighted the following key findings:

- The number of pupils receiving whole-class tuition in 2016–17 constituted 711,241, with 69.17% of these receiving tuition for the first time. Of these, 91.22% were primary-age children in Year 4. The continuation rate, i.e. the number of pupils progressing from whole-class activities to small-group or individual tuition, constitutes approximately 28.87%.
- Pupils receiving whole-class ensemble teaching for less than only one term increased significantly from 24,892 to 35,340 — an increase of 41.97% over four years.
- Music Hubs reached 9.23% of the school population (primary and secondary).
- In relation to ensemble activities, Music Hubs provided 16,809 ensembles or choirs in 2016–17 to 321,363 pupils — representing 4.56% of the state-funded school population.
- The number of pupils participating in regular ensembles had fallen from 347,556 in 2014–15.

- The number of pupils receiving tuition on a small-group or individual basis constituted 541,910, of whom 238,909 were learning in groups.
- In relation to the final core activity, i.e. Support for Singing, research showed that Music Hubs provided 3,647 vocal ensembles throughout the year, reaching 88.62% of schools. These were predominantly primary-based.

Music hub income derives from a variety of sources:

Income Source	Actual (£) 2016–17	2016–17 as a Percentage
Governmental funding	75,030,001	38.68%
LA grants	5,663,156	2.9%
Other Arts Council awards	754,877	0.39%
School contributions	58,580,748	30.20%
Parental contributions	33,774,084	17.41%
Youth Music Grants	1,009,359	0.52%
Sponsorship	160,599	0.08%
Charitable donations	1,038,666	0.54%
Other donations	444,802	0.23%
Other traded income	13,445,899	6.93%
Other miscellaneous income	4,072,796	2.10%
TOTAL	193,974,987	100%

Compared to previous years, the largest reductions in income in real and percentage terms were in local authority grants and in contributions, down 15.12% on the previous year. Other traded income was also down by 12.02% on the previous year.

The Music Education Hub report produced by the Musicians' Union in 2014, with a particular focus upon the workforce and how it was affected by changes in working practices, revealed two key tensions:

- Firstly, the increasing autonomy given to schools — including their right to set their own curriculum, move away from local authority control and gain financial independence — appeared to contradict Ofsted’s advice that schools must engage with hubs, whilst failing to set any statutory obligations to do so;
- Secondly, there was an increasing reliance upon zero-hour or self-employed teachers, with no guarantee of work, pensions, holiday pay, etc., and with very little career and professional development.

The follow-up report, entitled *State of Play* (2019), revealed that:

- 89% of parents were making a financial contribution towards instrument lessons (note: families with lower incomes, earning below £28k per annum, are half as likely to have a child learning a musical instrument as families with higher incomes, earning above £48k per annum — The MU 2018)
- 64% of teachers were self-employed
- The average hourly rate for teachers was £29.22
- 53% of Music Hubs were competing with unaccountable private providers (note: more young people are adopting a DIY approach to music learning, with 39% reporting that they are, to some extent, teaching themselves — Youth Music Survey by Ipsos MORI)
- 73% were not qualified teachers
- 87% of teachers did not receive pay for travelling time
- 74% did not receive holiday pay
- 43% had no idea what the NPME was
- 64% lacked confidence in the government’s handling of music education

The report concluded:

‘Since the introduction of the NPME there have been significant changes in Music Education within England. Whilst some celebrate figures that report increased access and engagement, many teachers and others in the industry continue to have legitimate concerns regarding the quality of the Music Education on offer in schools, Music Services and Hubs. There are also concerns about the incoherent and patchy approach to Music Education across the country. Many would argue that the opportunity to access high quality Music Education has become a ‘postcode lottery’. There is a sense that the fragmentation of Music

Education as a result of curriculum reforms and the diversity of approaches taken by Hubs and other bodies has significantly enhanced this incoherence.'

The recommendations from *State of Play* are worth noting in the context of designing the strategy for Wales:

Workforce

- There needs to be an end to the bogus self-employment of instrument teachers. Employment or self-employment models and associated contracts must be properly designed and implemented in line with best practice and HMRC guidelines.
- Zero-hour contracts must be used in appropriate contexts and as a last resort. Local authorities and Music Education Hubs must review their practices associated with the use of zero-hour contracts in line with HMRC guidance.
- Instrument teachers must receive appropriate levels of pay and associated terms and conditions, e.g. holiday pay and travelling time pay. These should include a right to paid opportunities for continuing professional development on a regular basis.
- The Certificate for Music Educators (which is available also to teachers in Wales) should be marketed more efficiently, and the benefits raised for those seeking to enter the instrumental music teaching sector. Any young teacher working with a Music Education Hub, be it employed or self-employed, should be offered this as a minimum entitlement, free of charge, by their Music Education Hub.
- Music Education Hubs and other organisations working with the instrument teaching sector should work more proactively with higher education institutions in considering ways of making Level 7 (postgraduate) teaching qualifications available to their staff without the need for them to take substantial breaks from their employment.
- Model contracts should be designed by leading music education organisations for use throughout the sector. A range of guidance and support materials should be provided for those working as instrument teachers, classroom teachers and ensemble leaders.
- Tailored advice and support with respect to contract law, pay, terms and conditions should be designed and made freely available for young teachers entering the instrument teaching profession.
- Continuing professional development opportunities that explore contract law, best practice in its implementation, and its implications for their workforce should be designed for and offered to all music managers leading organisations in receipt of Arts Council funding.

Schools

- The funding associated with the delivery of the National Plan for Music Education is appreciated. However, this has been cut over time and it is vital that it is not cut further. Music Education Hubs need to be held to account for their decisions more robustly and underperforming hubs should be challenged and, if required, re-designated when underperforming.
- Music Education Hubs should continue to provide free access to instrument lessons for children from low-income families. An uplift in pupil premium funding should be considered by policymakers in order to help ensure that this access is maintained.
- Music is a core subject of the National Curriculum. It must be taken seriously by headteachers and governing bodies and form part of the curriculum experienced by every child in every school. Schools that fail to deliver the National Curriculum in full must be held to account more rigorously.
- Music must remain a core part of the National Curriculum. The principles of music education being built upon the interrelated musical processes of performing, composing, listening, reviewing and evaluating must be maintained. Music education is much more than just giving a child an opportunity to learn a musical instrument.
- Every primary school should be challenged about its provision of a curriculum-based music education offer in line with the requirements of the National Curriculum. Primary schools that do not provide the leadership for music education, the timetabled space or the resources should be challenged by Ofsted, with steps taken to improve their students' access and entitlement to a high-quality music education.
- Further developments and opportunities for the application of live-streaming technologies must be explored so as to help schools offer a broad range of music education opportunities to all students. Music education networks must be strengthened in the digital as well as in the physical environment.
- Learning a musical instrument does not equate to a systematic and comprehensive music education. Every child should have access to a high-quality classroom-based music education based upon the core principles of the National Curriculum for Music.
- The detrimental impact of the EBacc upon music and arts provision must be acknowledged and reversed by policymakers. The deterioration of music in secondary schools will not be reversed until this artificial and harmful accountability measure is removed.
- Schools should not be classified as outstanding by Ofsted unless their music and arts programmes are embedded throughout the appropriate Key Stages, staffed and resourced appropriately and are of a good quality.

- Leading music education organisations should work more closely with Ofsted in exemplifying what a good-quality, school-based music education looks and sounds like in line with the National Curriculum requirements.

Music Hubs

- Music Hubs should be given greater freedom to prioritise their own aims and objectives within their local context. Key aims set nationally have not improved the patchiness associated with music education in recent years. Local accountability should be emphasised, but Music Hubs should be held accountable for their decisions in line with the other recommendations made in this report.
- Local authorities should be encouraged to put devolved funds for music education programmes alongside the work of their Music Hubs and schools. There is an inequality here that needs to be addressed. Funding from Arts Council England should not preclude local investment.
- Music Hubs should be encouraged to broaden their networks with all organisations in their local area that are offering music education opportunities to young people, subject to appropriate quality assurance frameworks. This should include early years provision, rehearsal studios, independent schools, and other groups.
- Music Hubs should be encouraged to engage with independent schools in their areas in order to develop joint projects, ensemble activities and other enhancement opportunities. This would have an additional benefit for independent schools in helping them to justify their charitable status.
- Music Hubs should examine the progression routes for students from schools to further education colleges. They should play a greater role in overseeing this progression and ensuring that it meets the specific needs of students.
- Music Hubs should be encouraged to liaise with other hubs in sharing resources and instruments. The stockpiling of musical instruments must be ended.
- Arts Council England should challenge the work of Music Hubs more robustly when it is not up to standard, and appoint new hubs if required. The process of appointing new hubs should be clear and transparent. There should be a renewed focus upon the quality of a hub's work in accreditation and validation processes.
- Arts Council England should provide a framework for a more robust inspection of Music Hub governance models. Where there is poor practice, this should be challenged; if not, new, improved organisations should be appointed to the hub role.
- Arts Council England should re-examine the process of collecting data from Music Hubs and the interpretation of this data. Data collection processes need to be refined

in order to prioritise musical quality as well as basic engagement numbers. Some form of independent inspection of Music Hubs should be implemented so as to monitor self-assessments of musical quality alongside the basic auditing procedures.

- Arts Council England should implement a standard, regular 3–5-year funding cycle for Music Hubs in order to help facilitate and strengthen longer-term planning.
- Music Hubs and other organisations should be encouraged to explore the appropriate use of music and other communication technologies, including live streaming, to provide access to music education for all young people.

The provision of high-quality opportunities for music education in the early years and SEND must form a strategic part of any future National Plan for Music Education. Funding should be provided in order to support high-quality offers and some form of ‘Kitemarking’ best practice should be considered so as to help parents and others to identify the very best provision.



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This document is also available in Welsh.



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