

TO: EXECUTIVE MEMBER
DATE: 29 JUNE 2018

CONSULTATION ON THE AMALGAMATION OF ASCOT HEATH INFANT AND CE JUNIOR SCHOOLS

Director of Children, Young People and Learning

1 PURPOSE OF DECISION

- 1.1 To decide whether to undertake a consultation with all stakeholders over the possible amalgamation of Ascot Heath Infant and Church of England (CE) Junior Schools.

2. EXECUTIVE SUMMARY

- 2.1 When an opportunity arises the Council considers the amalgamation of infant and junior schools so that the benefits of primary provision can be realised.
- 2.2 With the retirement on 31 August 2018 of the headteacher at Ascot Heath Infant School such an opportunity is presented.
- 2.3 The process and typical timescales are laid down in statutory guidance from the DfE. The first stage is a wide stakeholder consultation which this paper seeks to agree.
- 2.4 Should an amalgamation be finally agreed in early 2019 it is expected that the new primary school would open on 1 September 2019.

3. RECOMMENDATION

- 3.1 **That the consultation on the possible amalgamation of Ascot Heath Infant and CE Junior Schools should proceed.**

4. REASONS FOR RECOMMENDATION

- 4.1 If an opportunity is presented to amalgamate Infant and Junior Schools then the Council seeks the views of all stakeholders with the intention of achieving this outcome.
- 4.2 An example would be when the headteacher of one of the schools leaves or retires, as is the situation at Ascot Heath Infant School where Catherine Bates is retiring after 11 years as headteacher.
- 4.3 If the two schools amalgamate into a primary school there are opportunities for better educational outcomes for children through a consistent approach through the primary phase and other benefits (more details are provided in paragraph 6.6).
- 4.4 The governing bodies of both schools have agreed to support a consultation on amalgamation.

5. ALTERNATIVE OPTIONS CONSIDERED

- 5.1 Not to progress with amalgamation proposals, meaning that both current schools continue as separate organisations and the possible benefits are not realised.

6. SUPPORTING INFORMATION

Background

- 6.1 The Ascot Heath schools were created as separate Infant (ages 4-7 years) and Junior (ages 7-11 years) schools, and they share the same site in North Ascot.
- 6.2 There are however positive educational benefits for children to be educated in all-though primary schools (ages 4-11 years). The majority of schools in the Borough are primary schools, and any new school would be a primary school.
- 6.3 Over the years a number of separate infant and junior schools in Bracknell Forest have joined together to form a single primary school: College Town Primary School is being established in September 2018 and, previously, Sandy Lane and Great Hollands Primary schools were created as a result of amalgamations. Amalgamated schools have been successful and have achieved many benefits similar to those envisaged with this proposal (see paragraph 6.6)
- 6.4 With the retirement of the headteacher of Ascot Heath Infants on 31 August 2018 an opportunity is presented to amalgamate the schools. This is supported by the governing bodies of both schools and the CE Diocese of Oxford.
- 6.5 The Council will help by leading the process of consulting everyone who may be interested in the proposal. If the Executive Member agrees at the end of the process to amalgamate both schools, The Council will help with planning and organisation of the new school.

Why might change be desirable?

- 6.6 In principle, amalgamation would:
- Enable better continuity of education and progression for all pupils and parents, in particular from Key Stage 1 to Key Stage 2.
 - Enable more stability for children and parents by avoiding the need for a change of school at a young age.
 - Enhance the safeguarding needs of all pupils, for example by being aware of the needs of children of all ages in the same family.
 - Provide scope to achieve higher educational outcomes.
 - Provide opportunities to develop the curriculum across all key stages, and enhance the delivery of the National Curriculum.
 - Allow better use of educational resources, including both teaching and non-teaching staff.
 - Better enable the recruitment and retention of a headteacher to support the vision of a future, larger, combined primary school.
 - Provide opportunities to increase the range, expertise and experience of teaching and support staff, provide opportunities and development for staff, and opportunities in the deployment of staff.
 - Allow improvement and greater flexibility in management and organisation, for example in specialist teaching.
 - Provide greater opportunities for staff to work across a primary school and promote the recruitment and retention of staff.

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- Provide scope to achieve better value for money, for example by a rationalisation of some administrative and leadership posts in the school.
- Provide a higher profile in the local community.

What may be the drawbacks?

6.7 Amalgamation might present the following:

- Appropriate education of pupils of different ages. Strategies would need to be in place to ensure that the special qualities of education for Key Stage 1 and Key Stage 2 children are preserved.
- Potential disruption to pupils' education during the transition to a primary school. A new set of 'whole school' policies and practices would be developed as part of planning the way the future school will look.
- Regardless of the method adopted (see below), standards may be diluted in the short term while any new school establishes itself.
- The effective use of current buildings may be a challenge.
- Budget implications. In the longer term the budget for the future primary will be smaller than the total amount currently available to both schools but value for money savings will also be made from running one school instead of two and from economies of scale.

What is proposed?

- 6.8 The approach to amalgamations is described in statutory guidance 'Opening and closing maintained schools: Statutory guidance for proposers and decision-makers' DfE, April 2016.
- 6.9 Likely timeframes in this instance are provided in Annex 1.
- 6.10 DfE Statutory Guidance states that there are two different routes to amalgamating an Infant and Junior School: 1) closing both schools and opening a primary school or 2) closing one school and extending the age range of the other school.
- 6.11 If route 1 is pursued the new primary school may be a local authority maintained school, a Church school or an academy. There is no appetite from the governing bodies, diocese or the local authority for the new school to be an academy so this alternative is not included as a consultation option. If route 2 is pursued the school extending its age range would remain in its current form as either a local authority maintained school, if the expansion of the Infant School is preferred, or a Voluntary Controlled Church of England School if the expansion of the Junior School is preferred.
- 6.12 Changes to the size of year groups are not being considered.
- 6.13 The consultation will therefore seek views on:
- Whether or not it would be advantageous to merge the Infant and Junior schools and open an Ascot Heath Primary School.
 - The process of amalgamating the schools, presenting the following options:
 - To close Ascot Heath CE Junior School and extend the age range at Ascot Heath Infant School to become a Primary School. (Option 1)
 - To close Ascot Heath Infant School and extend the age range at Ascot Heath CE Junior School to become a Primary School. (Option 2)

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- To close both schools and open an Ascot Heath Primary School. (Option 3)
- Whether the new Primary School should have a Local Authority or Church of England status.

6.14 The Consultation Plan is attached as Annex 2.

Next steps

- 6.15 The proposed consultation period runs from 5 July 2018 to 25 September 2018. Responses to the consultation, feedback from the meetings and other information (for example on costs) will be considered by the Executive Member in October 2018 and the decision taken whether or not to formally determine to proceed with the amalgamation of the two schools.
- 6.16 If the decision is taken to proceed, a formal notice describing the precise proposal will be published followed by a four week period of 'representation' (formal consultation) during which views can be submitted. It is hoped that this stage can be completed by the end of November 2018.
- 6.17 The Executive Member will then consider responses and decide the proposal. It is hoped that this stage can be completed by 31 December 2018.

If it is agreed to proceed

- 6.18 The Council will support the schools with amalgamation into a primary school, which would likely open on 1 September 2019.
- 6.19 The existing governing bodies would continue until the schools ceased to be maintained. After the Executive Member had decided to proceed, if Option 1 or 2 were followed it would be for the governing body of the school remaining open to decide if it wished to enlarge to ensure it was representative of all the stakeholders of both schools, for example by reconstituting and electing or appointing additional governors. If Option 3 were followed, the Council would establish a temporary governing body until the primary school opened. This would usually include representatives from both infant and junior school governing bodies, nominated and/or appointed by the Council and Diocese, as appropriate.
- 6.20 A further advantage of a new primary school is that the pupils would continue through the new primary school, without a having to re-apply for a school place at 7 years of age. It was agreed in February 2018 that the planned admission numbers (PANS) of both schools would be harmonised at 60 places with effect from September 2019. It is anticipated that the class organisation of the new primary school would be very similar to that in the current infant and junior schools.
- 6.21 The Organisational Change staffing protocol would guide the deployment of staff from the current schools to the new primary school together with the requirements of the School Staffing Regulations. A staffing structure would be drafted for consultation but, in practice, many roles would continue largely unchanged. There may be an opportunity to rationalise certain posts within the school – such as through the administrative functions, although this is already done in some areas with the sharing of the School Business Manager role. Where any salary reductions are identified then salary safeguarding arrangements will apply for 3 years.

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- 6.22 The Site Controller is already shared between the two schools and there is a single caretaker's house located on the shared site. The school meals kitchen is located in the Junior School but is also already shared between the two schools.
- 6.23 There are areas that would benefit from capital investment to support amalgamation and the scope and scale of this has yet to be determined. Signage would need to be changed even if the buildings were left as they are. Refurbishment could create a new large shared staff room and administration offices required by an amalgamated school, as well as the single formal entrance and public reception area. Another significant issue would be the rationalisation of plant, equipment and ICT across the combined site to provide common standards of provision and to maximise value for money on running costs for the amalgamated school going forwards. If consultation results in a proposal to amalgamate then at that time a feasibility study would be undertaken to determine the precise scope and estimated cost of the various options for capital works, for the Council to consider funding through the normal budget setting process.
- 6.24 Capital funding options are:
1. To allocate DfE Basic Needs Grant (BNG) in 2019/20 - we have had a total allocation of £750k in that year announced by the ESFA to meet demand for new school places.
 2. To allocate from the unspent balance of BNG in the current year. The likely use for this balance otherwise is to reduce the borrowing requirement for Kings Academy Binfield.
 3. To bid for Council funding in 2019/20
- 6.25 If amalgamation goes ahead, the Council would not make a significant investment in the existing site and buildings until the outcome of the proposal from Marplace to rebuild the school/s is known. If the development proceeds, any capital investment incurred by the Council to effect the amalgamation would be wasted. If this outcome is not known by September 2019 then a likely scenario could be undertaking the essential ICT works before the start of the September 2019 academic year to secure the operation of the new primary school with a follow on phase of work on the existing buildings if and when it is known that the outcome of the Marplace proposal is not going ahead.
- 6.26 In terms of revenue funding implications arising from an amalgamation, a Primary school will receive less funding than a separate Infant and Junior schools. This is because every school receives the same amount of fixed lump sum funding allocation, irrespective of school size. However governors will also be able to make value for money savings from running one school instead of two and from economies of scale such as moving to one headteacher; changes to leadership, office and support staff; and rationalisation of site contracts.
- 6.27 Taking account of the current proposals in the Schools National Funding Formula, which have yet to be confirmed and are therefore subject to change, an amalgamated Primary School would receive £110k per annum less than separate Infants and Junior Schools. There would be one year of transitional funding where the new primary school receives 85% of the fixed lump sum received by the Infants and Junior schools, so a funding reduction of £17k, before the full funding reduction is implemented.

7. **ADVICE RECEIVED FROM STATUTORY AND OTHER OFFICERS**

Borough Solicitor

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- 7.1 The relevant legal issues are addressed within the main body of the report, particularly the options for retaining the amalgamated school as a maintained school or an academy or free school.

Borough Treasurer

- 7.2 The financial implications anticipated at this stage are set out in the supporting information. In terms of the potential impact on the council, any capital investment, even if it is initially funded from DfE grant will ultimately increase the council's borrowing requirement as it will reduce the amount of grant available to contribute to the cost of Binfield Learning Village. Every £1m of capital investment funded by the council results in a £50,000 revenue pressure to service debt charges. All new capital project schemes need to be approved by full council before any expenditure can be incurred.

Human Resources

- 7.3 The main workforce issues are covered under paragraph 6.21. The School Staffing Regulations enables a headteacher to be appointed to a post without the need of a selection process in certain situations such as an amalgamation. Where the remaining headteacher has the skills and experience to take on the role to lead the new primary school Consideration should be given to this before a decision is made to advertise the post nationally.
- 7.4 The infant school will need to consider the options for interim leadership arrangements from 1 September 2018 due to the retirement of the current postholder.

Equalities Impact Assessment

- 7.5 Issues are addressed in the Consultation Plan.

Strategic Risk Management Issues

- 7.6 Issues are addressed below.

ISSUE		RISK	COMMENT
1	School standards	Standards will fall when schools amalgamate into a primary school	The evidence is that better continuity for pupils, opportunities for enhanced delivery of the National Curriculum and better use of resources are more likely to lead to higher standards. LA support will be provided to the primary school to maintain and improve standards.
2	Recruitment and retention	Staff retention may be a concern on amalgamation	Opportunities will be presented to increase the range, expertise and experience of teaching and support staff, provide opportunities and development for staff, and enhanced opportunities in the deployment of staff. In the long term these should aid recruitment and retention. Effective communication can mitigate this risk.

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3	Financial	Running costs following an amalgamation may exceed the reduced funding allocation due from the Schools National Funding Formula.	Governors will need to carefully consider the required staffing structure and other budgets and satisfy themselves that the financial consequences of amalgamation can be managed.
4	Proposal from Marplace to develop the site	If the development proceeds, any capital investment incurred by the Council to effect the amalgamation would be wasted.	By the time feasibility studies are undertaken, and priorities for works and funding agreed, progress with Marplace's scheme will be further forward possibly with an outcome known.
5	Proposal from Marplace to develop the site	Confusion during the consultation if there is consultation regarding the Marplace scheme at the same time	Clear communication of the issues regarding the schemes separately, and the links between them.

8. CONSULTATION

Principal Groups Consulted

- 8.1 The first stage of the amalgamation process is a wide consultation with all stakeholders of at least 6 weeks.
- 8.2 Parents, children, staff, governors, trade unions and the wider community will be consulted.

Method of Consultation

- 8.3 Through consultation materials on the Council's website, feedback from meetings and individual's comments.

Representations Received

- 8.4 To be reported in a subsequent paper to the Executive Member expected to be in late October 2018.

Background papers

Organisation Change Staffing Protocol available at <http://schools.bracknell-forest.gov.uk/hr>

Contact for Further Information

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Annex 1

Ascot Heath schools – Possible amalgamation – consultation and approval process

<i>Stage</i>	<i>Any guidance?</i>	<i>Period; End date</i>
Initial written agreement from both Governing Bodies to consider amalgamation		Complete
Preparation <ul style="list-style-type: none"> • Planning • Decision on approach • Initial approval by Executive Member on 11 June • Preparation of materials 		14 May – 4 July
Consultation <ul style="list-style-type: none"> • Leaflets/Posters • Website • Meetings • etc 	'A minimum of 6 weeks; school holidays should be avoided.' 'Consult individuals, groups and organisations'	5 July to 25 Sept
Consider consultation outcomes and report to Executive Member		26 October
Prepare and publication of Formal Notice		
Formal consultation / Representation	'Must be 4 weeks, or more.' 'Must cover the specific proposal'	29 October to 25 November
The statutory proposal and notice are sent into the DfE notifications mail box	Within one week	
Depending on amalgamation option selected, either:		
<ul style="list-style-type: none"> • If schools closing and primary opening, establish Instrument and Temporary Governing Body of Primary School or; 	Individual GBs continue until new school opens. On school opening, Temporary GB ceases and substantive GB takes over.	
<ul style="list-style-type: none"> • If one school is extending its age range, review instrument, extend GB/set up a 'primary school' committee 	GB of school to close to continue to meet until school closes.	
Consider consultation outcomes and final determination of proposal by Executive Member.	'Must be within 2 months' (else proposal is referred to Schools Adjudicator)	By 31 December 2018

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Stand-still period for appeals	'4 weeks'	By end January 2019
The decision record is sent to the DfE Notifications email address.	Within one week	
Implementation		By 31 August 2019
<ul style="list-style-type: none"> • Admission issues 		
<ul style="list-style-type: none"> • School Name 		
<ul style="list-style-type: none"> • GB confirms/ recruits (depending on option) a Headteacher 		By 31 January 2019
<ul style="list-style-type: none"> • Address financial issues 		By 31 December 2018
<ul style="list-style-type: none"> • Agree staffing structure 	Organisational change protocol to be used	By 31 May 2019
<ul style="list-style-type: none"> • If necessary, agree Instrument of Government of, if necessary, temporary and substantive GB 		
<ul style="list-style-type: none"> • Consider options for building works e.g. to establish a common entrance, one staffroom and one office. 	Various options will be possible of different scales. Funding of these works to be determined.	
<ul style="list-style-type: none"> • Establish / review school policies 		
<ul style="list-style-type: none"> • Practical issues e.g. uniform 		
Primary school opens		1 September 2019

Annex 2

CONSULTATION PLAN

AMALGAMATION OF ASCOT HEATH INFANT AND JUNIOR SCHOOLS

1. Introduction

This consultation is to seek views on the proposed amalgamation of Ascot Heath Infant and Church of England (CE) Junior Schools. It is the first stage in the process that could lead to the schools amalgamating into a primary school in September 2019.

The consultation is relevant to:

- Children
- Their parents and carers
- Staff
- Trade unions
- The infant and junior school governing bodies
- Other schools in Bracknell
- Wider community.

2. Background

1. When an opportunity arises the Council considers the amalgamation of infant and junior schools so that the benefits of primary provision can be realised.
2. With the retirement on 31 August 2018 of the headteacher at Ascot Heath Infant School such an opportunity is presented.
3. The process and typical timescales are laid down in statutory guidance from the DfE. The first stage is a wide stakeholder consultation which this paper seeks to agree.
4. Ascot Heath Infant and Junior Schools were designed as separate infant (ages 4-7 years) and junior (ages 7-11 years) schools. There are positive educational benefits for children to be educated in all-though primary schools (ages 4-11 years). The majority of schools in the Borough are primary schools, and all new schools would be a primary school.
5. Over the years a number of separate infant and junior schools in Bracknell Forest have joined together to form a single primary school: College Town Primary is being established from September 2018; Sandy Lane and Great Hollands Primary schools were among the more recent amalgamations.
6. The Council will help by leading the process of consulting everyone who may be interested in the proposal. If the Council agreed at the end of the process to amalgamate both schools, it will help with planning and organisation of the new school.

3. Consultation scope

The Consultation Mandate is attached as Appendix A.

The Council is committed to understanding the views of everyone with an interest in primary education in the North Ascot community. These views will:

- Establish the appetite for amalgamation.
- If there is an appetite, inform the precise proposal to amalgamate into a single primary school.

4. Consultation process and methods

The consultation methodology will include a range of consultation methods ensuring a balance between the groups to be consulted.

Methods will include:

- Information and a questionnaire available on the Council's consultation portal, website and on paper.
- School-based meetings for parents and staff.

Promotion will include:

- Circulating information to interested parties
- Use of Council press releases
- Use of Council social media feeds
- Links on schools' websites
- Having leaflets available at local venues

The timetable/project plan is attached as Appendix B.

The consultation will therefore seek views on:

- Whether or not it would be advantageous to merge the Infant and Junior schools and open an Ascot Heath Primary School.
- The process of amalgamating the schools, presenting the following options:
 - To close Ascot Heath CE Junior School and extend the age range at Ascot Heath Infant School to become a Primary School.
 - To close Ascot Heath Infant School and extend the age range at Ascot Heath CE Junior School to become a Primary School.
 - To close both schools and open an Ascot Heath Primary School.
- Whether the new Primary School should have a Local Authority or Church of England status.

Comments:

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Please tell us about yourself: Are you?

A parent

Please tell us the age(s) of your child/children

Do they attend AHI or AHJ schools now?

Did they attend AHI or AHJ schools in the past?

Will they attend AHI or AHJ schools in the future?

Do they / did they / will they attend another school? If so, which

A member of the community

Have you a particular interest in the schools? If so, what?

A member of staff at either school

Teaching AHI AHJ
Non-teaching AHI AHJ

A governor at either school

AHI AHJ

Do you have another interest in the schools? Please specify

Your name

Your postcode

5. Equalities

Materials will be made available in other languages or formats on request.

Meetings will be held in fully accessible venues

6. Timescales

The consultation will be open for the period Thursday 5 July to Tuesday 25 September 2018.

The Executive Member for CYPL will consider the outcomes of the consultation and determine next steps in late October 2018.

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Consultation mandate

	Consultation mandate 7 elements	Your consultation mandate
1	We	Bracknell Forest Council, Children, Young People and Learning (CYPL)
2	Need to understand the views of (target audiences/stakeholders – such as residents, local businesses)	Governors, school staff, trade unions, parents, children and the local community.
3	Concerning (issue)	The possible amalgamation of Ascot Heath Infant and Junior Schools.
4	So that (actor – such as Executive or Executive Member, a Director, lead officer or team)	The Executive Member, CYPL
5	Can (take an action)	Understand the appetite for amalgamation
6	Between (date)	5 July 2018 and 25 Sept 2018
7	So as to accomplish/in order to (wider aim)	Determine whether or not to proceed with the amalgamation.

Timetable / Project Plan

Appendix B

Initial liaison	Notes	Earliest	Latest	Progress
Gain positive support of the governing bodies to the amalgamation			21 June	Complete
Liaise with Infant and Junior School Governing Bodies			21 June	Underway
Preparation and approvals				
Paper to DMT		21 June		
Executive Member Sign off		29 June		
Consultation preparation				
Preparation of materials – leaflets, website, social media			4 July	
Distribute materials		4 July	5 July	
Arrange parents meeting			29 June	
Arrange staff meetings			29 June	
Consultation		5 July	25 Sept	
Respond to any queries				
Parents Meeting		??		
Staff meeting		??		
Approvals - Review outcomes and agree next steps				
Review of findings		26 Sept	18 Oct	
DMT Papers		11 Oct		
Meeting		16 Oct		
Executive Member Papers		18 Oct		
Meeting		26 Oct		