

TO: EXECUTIVE MEMBER
DATE: 30 JULY 2018

CONSULTATION ON THE AMALGAMATION OF HOLLY SPRING INFANT AND 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 Holly Spring Infant and 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 of the Holly Spring Junior School Headteacher at Easter 2018 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 Holly Spring Infant and 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 Holly Spring Junior School where Trisha Donkin retired at Easter 2018.
- 4.3 Junior schools in the Borough are currently presenting challenges with their pupil outcomes and one way to generate and sustain improvement is through an amalgamation process as it creates a stronger, larger primary school. The Council promotes school amalgamations for these reasons.
- 4.4 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).
- 4.5 The governing bodies of both schools have agreed to support a consultation on amalgamation.

5. ALTERNATIVE OPTIONS CONSIDERED

- 5.1 The option of federation was investigated. Although in the short-term there would financial benefits in this approach, in the long term a primary school would be more robust. Also if one of the schools in a federation received a poor inspection outcome then it would lead all of the federated schools vulnerable to the same judgement.
- 5.2 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 Holly Spring schools were created as separate Infant (ages 4-7 years) and Junior (ages 7-11 years) schools, and they share the same site in Bullbrook.
- 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, Meadow Vale, The Pines and other schools were successfully 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 An amalgamation is supported by the governing bodies of both schools.
- 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.
 - Enable the successful 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.

Unrestricted

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

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.
- 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 The new primary school may be a local authority maintained school or an academy. There is no appetite from the governing bodies or the local authority for the new school to be an academy so this alternative is not included as a consultation option.

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 as Holly Spring Primary School.
- The process of amalgamating the schools, presenting the following options:
 - To extend the age range at Holly Spring Infant School to become a Primary School and close Holly Spring Junior School. (Option 1)
 - To extend the age range at Holly Spring Junior School to become a Primary School and close Holly Spring Infant School. (Option 2)
 - To close both schools and open as Holly Spring Primary School. (Option 3)

6.14 The Consultation Plan is attached as Annex 2.

Next steps

- 6.15 It is a requirement that 6 weeks of term time are included in the consultation period; this will happen at the start of the Autumn Term. However the consultation will start a week after the decision is made to allow extra time and to demonstrate the Council's commitment to change. The proposed consultation period therefore runs from 6 August 2018 to 14 October 2018. Responses to the consultation, feedback from the meetings and other information (for example on costs) will be considered by the Executive Member on 16 November 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 16 December 2018.
- 6.17 The Executive Member will then consider responses and decide the proposal. It is hoped that this stage can be completed by 25 January 2019.

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.
- 6.20 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. 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. Where any salary reductions are identified then salary safeguarding arrangements will apply for 3 years.
- 6.21 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. Changes could include the pre-school, bringing the after school provision back onsite, creation of an improved and larger entrance and a larger staff room. 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.

6.22 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

6.23 In terms of revenue funding implications arising from an amalgamation, a Primary school will receive less funding than 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.

6.24 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.

6.25 Because of the challenges to pupil outcomes currently presented by Junior schools, the Council promotes school amalgamations but also recognises that additional support is required to Junior aged pupils right now and one-off grant funding is available for this purpose, subject to a proper evaluation of need and sufficient grant being available.

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

Borough Solicitor

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 Headteacher of the Infant school is currently the Interim Executive Headteacher of the Junior school and will continue in this role until the outcome of the consultation and any amalgamation process is complete.

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 from other primary schools 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.
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.

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.

Unrestricted

- 8.2 Parents, children, staff, governors, trade unions and the wider community around the school will be invited to respond.

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 mid November 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

Holly Spring 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 		1 July – 5 August
Consultation <ul style="list-style-type: none"> • Leaflets/Posters • Website • Meetings • etc 	A minimum of 6 weeks in term time. The expectation is that 'individuals, groups and organisations' will be consulted.	6 August to 14 October
Consider consultation outcomes and report to Executive Member		16 November
Prepare and publication of Formal Notice		
Formal consultation / Representation	'Must be 4 weeks, or more.' 'Must cover the specific proposal'	19 November to 16 December
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)	25 January 2019

Unrestricted

Stand-still period for appeals	'4 weeks'	By end February 2019
The decision record is sent to the DfE Notifications email address.	Within one week	
Implementation		By 31 August 2019
• Admission issues		
• School Name		
• GB confirms/ recruits (depending on option) a Headteacher		By 31 January 2019
• Address financial issues		By 31 December 2018
• Agree staffing structure	Organisational change protocol to be used	By 31 May 2019
• If necessary, agree Instrument of Government of, if necessary, temporary and substantive GB		
• 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.	
• Establish / review school policies		
• Practical issues e.g. uniform		
Primary school opens		1 September 2019

Annex 2

CONSULTATION PLAN

AMALGAMATION OF HOLLY SPRING INFANT AND JUNIOR SCHOOLS

1. Introduction

This consultation is to seek views on the proposed amalgamation of Holly Spring Infant and 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
- Other school stakeholders including neighbours, local businesses and agencies working locally.

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 at Easter 2018 of the headteacher at Holly Spring Junior 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. Holly Spring 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 in September 2018 and, previously, Meadow Vale, The Pines and other schools were successfully created as a result of 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 Bullbrook and neighbouring communities. 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 as Holly Spring Primary School.
- The process of amalgamating the schools, presenting the following options:
 - To close Holly Spring Junior School and extend the age range at Holly Spring Infant School to become a Primary School.
 - To close Holly Spring Infant School and extend the age range at Holly Spring Junior School to become a Primary School.
 - To close both schools and open as Holly Spring Primary School.

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 HSI or HSJ schools now?

Did they attend HSI or HSJ schools in the past?

Will they attend HSI or HSJ 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	HSI	HSJ
Non-teaching	HSI	HSJ

A governor at either school

HSI	HSJ
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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 Monday 6 August to Sunday 14 October 2018.

The Executive Member for CYPL will consider the outcomes of the consultation and determine next steps in mid November 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 Holly Spring 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)	6 August 2018 and 14 October 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			9 July	Complete
Liaise with Infant and Junior School Governing Bodies			9 July	Underway
Preparation and approvals				
Paper to DMT		10 July	10 July	Complete
Executive Member Sign off		30 July		
Consultation preparation				
Preparation of materials – leaflets, website, social media			5 August	
Distribute materials			5 August	
Arrange parents meeting			24 July	
Arrange staff meetings			24 July	
Consultation		6 August	14 Oct	
Respond to any queries				
Parents Meeting		??		
Staff meeting		??		
Approvals - Review outcomes and agree next steps				
Review of findings		15 Oct	7 Nov	
DMT Papers		1 Nov		
Meeting		6 Nov		
Executive Member Papers		8 Nov		
Meeting		16 Nov		