

Cabinet Meeting

13 September 2017

Report title	Reorganisation of Educational Provision – Whitgreave Infant and Whitgreave Junior Schools	
Decision designation	AMBER	
Cabinet member with lead responsibility	Councillor Claire Darke Education	
Corporate Plan priority	People - Stronger Communities	
Key decision	Yes	
In forward plan	Yes	
Wards affected	Bushbury North; Bushbury South and Low Hill; Fallings Park;	
Accountable Director	Mark Taylor, Strategic Director - People	
Originating service	School Planning and Resources	
Accountable employee	Bill Hague Tel Email	Head of School Planning and Resources 01902 555100 Bill.Hague@wolverhampton.gov.uk
Report to be/has been considered by	People Leadership Team Strategic Executive Board	14 August 2017 22 August 2017

Recommendation(s) for action or decision:

The Cabinet is recommended to:

1. Approve the commencement of informal consultation on the proposed merger of Whitgreave Infant School with Whitgreave Junior School.
2. Delegate authority to the Cabinet Member for Education, in consultation with the Assistant Director - School Standards, to consider the outcome of informal consultation on the proposed merger of Whitgreave Infant School with Whitgreave Junior School and to determine whether or not to proceed to formal consultation.

1.0 Purpose

- 1.1 To introduce the proposal to merge Whitgreave Infant School with Whitgreave Junior School and to seek approval to commence a period of informal consultation on the proposal.

2.0 Background

- 2.1 Strategic policy regarding the organisation of primary school provision in the City is outlined within the Council's Primary School Organisation Strategy 2016-2018 (PSOS). This strategy was approved by Cabinet in July 2016 following consultation with key stakeholders.
- 2.2 The PSOS recommends that, "... the Council invites responsible bodies (e.g. Governing Bodies or Trusts) to consider the merger or amalgamation of infant and junior schools whenever the Headship of a school becomes vacant. For mergers to be considered, the leadership of the establishment that is proposed for expansion must be at least 'Good'."
- 2.3 The PSOS outlines a number of advantages of bringing infant and junior schools together, including:
- Reducing the number of major transitions that pupils face
 - Reducing the likelihood of lost learning at the beginning of Key Stage 2
 - Increasing the opportunity for specialist teachers to work with a wider range of pupils
 - Providing the opportunity for a consistent approach to the curriculum to be adopted
 - Ensuring the continuity of teaching, learning and achievement
 - Cost savings through economies of scale
- 2.4 The PSOS explains that, "The 'merger' of infant and junior schools is the process of joining the schools together by discontinuing one establishment and expanding and altering the age range of the other".

3.0 Whitgreave Infant School:

- 3.1 Whitgreave Infant School is a mixed community school that caters for children aged between 3 and 7 years, located in Low Hill Crescent, Low Hill. The school is in the Bushbury South and Low Hill ward. The school currently offers 60 places per year group (Reception to Year 2); 180 places in total and has a 60 place nursery. Whitgreave Infant School is co-located on the same site as Whitgreave Junior School but their facilities are separated by a playing field.
- 3.2 Individual school performance is independently assessed by Ofsted. Whitgreave Infant School was inspected and judged to be 'Good' by Ofsted in June 2014 and is a Local Authority Category A school. Children achieve well from relatively low starting points and performance at the end of Key Stage 1 is similar to national levels, with around 70% of children achieving the expected standard in reading, writing and maths.

- 3.3 The headteacher of Whitgreave Infant School retired on 31 August 2017. The governing boards of both Whitgreave Infant School and Whitgreave Junior School agreed to appoint the headteacher of Whitgreave Junior School, described by Ofsted as 'an inspirational leader', as the acting headteacher of Whitgreave Infant School with effect from 1 September 2017.

4.0 Whitgreave Junior School:

- 4.1 Whitgreave Junior School is a mixed community school that caters for children aged between 7 and 11 years, located in Goodyear Avenue, Low Hill. The school is in the Bushbury South and Low Hill ward. The school currently offers 60 places per year group in Years 3 – 6; 240 places in total. Whitgreave Junior School is co-located on the same site as Whitgreave Infant School but their facilities are separated by a playing field.
- 4.2 The school was judged 'Outstanding' by Ofsted in November 2015 and is a Local Authority Category A school. Performance at the end of Key Stage 2 remains strong and children make significant progress in both English and maths throughout Key Stage 2.

5.0 Governance:

- 5.1 In January 2017, the headteacher of Whitgreave Infant School formally announced her intention to retire at the end of the academic year 2016/17. Consequently, in line with published strategic policy within the PSOS 2016-2018, the Council invited both Whitgreave Infant School's Governing Board and Whitgreave Junior School's Governing Board to consider the future organisation of their schools.
- 5.2 The recommendation from both schools' governing boards was to merge Whitgreave Infant School and Whitgreave Junior School.
- 5.3 In order to ensure a smooth transition which does not jeopardise the existing high-quality provision and recognises the importance of effective partnership working, it was agreed to federate the governing boards during Summer Term 2017, prior to seeking formal approval to propose the merger of the schools.
- 5.4 A federation is where one governing board governs two or more schools. In order to achieve federation, consultation was undertaken by the respective schools' governors between 8 May 2017 to 26 June 2017. The federation was agreed on the 19 July 2017 and came into effect on 1 September 2017.

6.0 Proposed Merger of Whitgreave Infant School with Whitgreave Junior School

- 6.1 The Cabinet is recommended to approve the commencement of informal consultation on the proposal to merge Whitgreave Infant School with Whitgreave Junior School to create a primary school for children aged 3 to 11 years with effect from 1 September 2018.
- 6.2 When proposing to merge schools, local authorities must follow statutory processes and timescales as outlined in The School Organisation (Prescribed Alterations to Maintained Schools (England) Regulations 2013 and The School Organisation (Establishment and Discontinuance of Schools) Regulations 2013. To enable the proposed merger;

- Whitgreave Infant School would be discontinued on 31 August 2018.
- The age range of Whitgreave Junior School would be altered from 7 to 11 years to 3 to 11 years with effect from 1 September 2018.
- The recorded capacity of Whitgreave Junior School would be expanded to include the physical capacity of Whitgreave Infant School's buildings with effect from 1 September 2018.

6.3 The statutory consultation processes and the potential timeline for decision making can be found in section 8.0 of this report.

7.0 Future Provision:

7.1 If the proposal to merge Whitgreave Infant School with Whitgreave Junior School is ultimately approved:

- All pupils on roll as at the 31 August 2018 would automatically transfer to the primary school.
- The primary school would have 60 places per year group in Reception to Year 6 and a 60 place Nursery.
- All employees (as at 31 August 2018) at Whitgreave Infant School would transfer to the primary school (teaching and non-teaching trade union representatives will be fully engaged in the consultation process should Cabinet choose to proceed).
- The primary school would be located in the existing buildings of Whitgreave Infant School and Whitgreave Junior School.

8.0 Potential Consultation and Decision-Making Timeline

8.1 As indicated above, when proposing to merge schools, authorities must follow statutory processes and timescales. Should the proposal proceed the following indicative timeline would apply:

2 October 2017 – 19 November 2017 (Stage 1 – Informal Consultation – 7 weeks)

Informal consultation with stakeholders including pupils, parents, employees and governors.

December 2017

The Cabinet Member for Education in consultation with the Assistant Director - School Standards, considers the outcome of informal consultation and determines whether or not to proceed to the next stage of the process.

4 January 2018 (Stage 2 – Publication)

If the Council decides to continue, a public notice would be published summarising the proposal. A copy of the full proposal and the reasoning behind it would also be made available.

4 January 2018 – 31 January 2018 (Stage 3 – Formal Consultation – 4 weeks)

Formal consultation period (representation) – Offers stakeholders the opportunity to make formal comments or objections regarding the proposal.

21 February 2018 (Stage 4 – Decision)

The Cabinet of the Council would consider the outcome of consultation and make a final decision on the proposals. This decision would then be subject to a four-week appeals period.

1 September 2018 (Stage 5 – Implementation)

Subject to approval, proposals would be implemented as published.

9.0 Evaluation of alternative options:

9.1 Alternative options have been considered by both Council representatives and the school's governing boards including;

- Amalgamation – The closure of both schools and the establishment of a new primary school. Whilst this option would ultimately result in the establishment of a primary school and offer the corresponding benefits, it would also result in a new school number being issued. As such, both establishments' existing Ofsted judgements would no longer be recognised.
- Maintaining two separate schools – Continuing with the current organisation of provision. This option would not align to school aspirations and also not offer the anticipated benefits detailed in section 2.3.

10.0 Reasons for decision(s):

10.1 This proposal is in line with the Council's strategic policy as detailed within the Primary School Organisation Strategy 2016-2018 and would maximise the opportunity for the benefits detailed in section 2.3 to be realised.

11.0 Financial implications

- 11.1 The proposed merger of the schools would provide opportunities for efficiency savings and maximise the use of school resources, benefitting both schools longer term budget positions. The local authority schools funding formula includes a lump sum payment of £125,000 per school so the proposed merger would eventually release £125,000 of the Dedicated Schools Grant which would be available for allocation across the remaining schools in the City. In the year of conversion, 2018-19, the primary school would retain the full allocations originally made to the separate schools. A transitional year then follows, 2019-20, where the newly created primary school would receive a lump sum of £125,000 plus a proportional amount that would equate to £87,500, to help support the schools transition from separate infant and junior to a primary school.
- 11.2 Subject to approval of the proposal, it is recognised that there would be a need to invest in ICT to consolidate the infrastructure between schools. Given financial constraints facing the authority, it is anticipated that this cost would need to be met by the primary school utilising a proportion of the aforementioned lump sum allocation.
- 11.3 Subject to approval of the proposal, investment would also be required to merge the School Information Management System (SIMS) databases into one database, again it is

anticipated that this cost would need to be met by the primary school utilising a proportion of the aforementioned lump sum allocation. Final costs are not yet confirmed, however the costs of this and the ICT work are expected to be in the region of £40,000.

- 11.4 As the schools are located on separate sites, a path is required to support the transition to one school, facilitating movement of employees and equipment between the sites. Estimated costs of this work are between £75,000 to £125,000. A contribution towards this cost will be sought from the school; however, if this is not secured it is anticipated the cost of the path can be funded from existing maintenance budgets as part of the delivery of Schools Capital Maintenance Programme. Subject to approval to proceed, further clarity regard costings will be provided within future reports.
- 11.5 At the end of the financial year 2016-17, the schools balances were both in surplus; Whitgreave Junior School had £277,200 revenue whilst Whitgreave Infant School had £90,500 revenue and £12,700 capital. Based on the budget forecasts received, both schools are expected to have surplus balances at the anticipated point of transfer, 1 September 2018. Such balances would be combined for use in the single school, subject to the discretion of the local authority. Should, either of the schools move into a deficit position, the combined deficit/surplus will transfer to the newly created primary school.

[HM/16082017/D]

12.0 Legal implications

- 12.1 The legal implications arising from this report are stated in the body of the report. In addition, any proposals to alter the structure of school provision in the area would need to comply with the detailed provisions in the Education and Inspections Act 2006 to ensure sufficient consultation is undertaken and that relevant stakeholders are notified of the proposal/decisions in a timely manner.

[Legal Code: TS/10082017/W]

13.0 Equalities implications

- 13.1 This report has equal opportunity implications as the contents have direct relevance to educational provision for children and young people in the City.
- 13.2 Consultation would form part of the equality analysis. As part of this consultation the views of a range of stakeholders including; pupils, parents/carers, school employees, headteachers, school governors, trade union representatives, Councillors, members of parliament and diocesan authorities would be sought. This analysis will also draw on the relevant equalities related aspects of the PSOS 2016-2018.

14.0 Environmental implications

- 14.1 There are no environmental implications to this report.

15.0 Human resources implications

- 15.1 The employees of the schools in scope are employed by the local authority. There would therefore be no transfer of employment and it is anticipated that terms and conditions of employment would remain unaffected. However, it may be required to review the leadership structures of the schools. The appropriate human resources policy and process would be followed ensuring consultation with the affected employees, should the proposal be adopted.

16.0 Corporate landlord implications

- 16.1 Any works undertaken on the site that may impact upon the condition data held by Corporate Landlord will be updated to reflect the changes. Corporate Landlord will also work with Legal Services and the Geographic Information System (GIS) Team to inform them of the changes to the site and its change in status from infant and junior schools to a primary school.

17.0 Schedule of background papers

- Primary School Organisation Strategy 2016-2018
(<http://wolverhampton.moderngov.co.uk/documents/s27973/School%20Place%20Planning.pdf>)
- Whitgreave Infant School Ofsted Inspection Report – June 2014 (www.ofsted.gov.uk).
- Whitgreave Junior School Ofsted Inspection Report – November 2015 (www.ofsted.gov.uk).
- Cabinet (20 July 2016) School Place Planning.