



Derby City Council

**EDUCATION AND SKILLS CABINET
MEMBER MEETING
24 May 2017**

ITEM 5

Report of the Strategic Director for People Services

Proposal to merge Brackensdale Infant and Junior Schools to create a primary school

SUMMARY

- 1.1 At its meeting of 2 June 2009, Council Cabinet approved the policy of promoting infant and junior school mergers whenever possible and appropriate, once consideration has been given to a range of factors. The report confirmed the Council's preferred model for the delivery of primary education as an all-through (ages 5 to 11) primary school, as opposed to separate infant and junior schools. This model offers significant advantages in terms of continuity for pupils, alongside flexibility and efficiency in respect of staffing resources.
- 1.2 The current policy is to consider 'mergers' against a set of criteria when an opportunity arises due to a headteacher vacancy occurring in either an infant or junior school. An opportunity has arisen to consider a merger of Brackensdale Infant and Junior Schools due to the retirement of the Headteacher at Brackensdale Infant School in July 2017.
- 1.3 This report seeks Cabinet Member approval to go out to formal consultation on a proposal to 'merge' Brackensdale Infant and Junior Schools to form an all-through primary school from January 2018. The proposal is to close the Infant School and expand the age range and size of the Junior School to create an all-through primary. A timeline for the proposal is attached as Appendix 2. The proposed consultation document is attached as Appendix 3.

RECOMMENDATION

- 2.1 To approve consultation on a proposal to 'merge' Brackensdale Infant School and Brackensdale Junior School to form an all-through primary school from January 2018.

REASONS FOR RECOMMENDATION

- 3.1 There are clear benefits to be gained in merging the schools to create an all-through primary school as outlined in this report. Council Cabinet has previously approved a policy promoting infant and junior school mergers wherever possible and appropriate.

SUPPORTING INFORMATION

- 4.1 School mergers do not specifically feature within the relevant school organisation regulations. Instead, mergers can be achieved through statutory procedures to close one school and simultaneously expand the age range of the linked school. The choice of which school should close and which should expand is usually based on which school has a headteacher vacancy, with that school usually the one proposed for closure. The opportunity to consider the establishment of a primary school arises due to the retirement of the Headteacher at the Infant School in July 2017. The merger would be achieved through proposals to close the Infant School and simultaneously expand the age range and size of the Junior School. Once a “new” school is formed, it is necessary to form a single governing body to serve the new primary school.
- 4.2 There is a well established national preference for primary schools with full foundation stage provision, rather than separate schools serving individual key stages (nursery, infant and junior schools). This is based on evidence suggesting there are significant advantages of continuity, flexibility and efficiency. The main advantages are:
- A single primary school makes the transition of pupils between Years 2 and 3, from infants to juniors, smoother and better for pupils and their families with less chance of ‘lost learning’ at the beginning of Year 3.
 - The possibility to create a single and continuous approach to the curriculum, such as single policies for handwriting, reading, maths and behaviour.
 - School budgets are based mainly on the number of children in a school. If these go up and down year to year, it causes instability and can lead to a shortage of funding. The effects of this are often more pronounced for smaller schools as larger schools are more able to deal with fluctuations, for example leading to redundancies or lack of funds to purchase books, refurbish ICT equipment etc.
 - A larger school has more capacity to introduce remodelled posts, such as a site manager or school business manager. This releases the head and senior managers to concentrate more on the business of raising achievement for all children.
 - More development opportunities for the staff, such as shared training and the chance to work more closely across the curriculum and gain experience and understanding of all key stages.

4.3 **Analysis of the case for a merger**

The opportunity to consider the establishment of a primary school arises due to the retirement of the Headteacher at Brackensdale Infant School in July 2017. At its meeting of 2 June 2009, Council Cabinet approved the policy of promoting school mergers whenever possible and appropriate, once consideration has been given to a range of factors. An analysis of the situation at the two schools with regard to pupil numbers and school budgets is detailed below:

The stability of pupil numbers in the schools, including projected numbers and the potential size of the primary school

The table below sets out pupil number information for Brackensdale Infant and Junior Schools based on the October 2016 School Census.

School	Number on Roll	Net capacity	Surplus Places	% Surplus
Infant	198	180	-18	0
Junior	257	240	-17	0
Total	455	420	-35	0

There are no surplus places available across the schools. Pupil projections are suggesting an increase in pupil numbers across this cluster of schools over the next five years and a housing development is underway at Manor Kingsway, in the schools' catchment area. The Council has received the first payment of S106 funding for primary school places from the developer. Following Council Cabinet approval, initial design work has started on a school expansion scheme that would provide an additional 105 places across the schools. Once the remaining S106 funding has been received, statutory consultation will take place on the expansion proposal. Based on the indicative programme for the housing development, it is anticipated that the additional places at Brackensdale Infant and Brackensdale Junior will be required from September 2018 onwards.

Any current or predicted financial issues in either school which would affect the quality of provision.

The Junior School is currently predicting a deficit balance for 2016-17 of £49k (-6%). The infant school is predicting a surplus balance for 2016-17 of £28k (+2.9%).

Any relevant issues relating to the school buildings and/or site

If the two schools do merge, they will operate within existing buildings and any new buildings provided to accommodate an increased admission number if the separate school expansion proposal moves forward.

4.4 Next steps

As set out in Appendix 2, it is proposed that consultation on the proposal to merge Brackensdale Infant and Junior Schools will take place from 13 June 2017 to 25 July 2017. The Governing Bodies of Brackensdale Infant and Junior Schools both support this proposal.

The outcome of this initial consultation will be reported to Council Cabinet in August or September for approval to move the next stage of the statutory process which involves a further four week formal consultation process and the publication of a statutory notice. It is anticipated that a final consideration and approval will be given by the Director of People Services in October 2017 if there are no objections to the proposal. If there are any objections, a decision will be considered by Council Cabinet by the end of November 2017, with a proposed implementation date of January 2018.

OTHER OPTIONS CONSIDERED

5.1 There is an option to retain existing infant and junior schools. This would result in a missed opportunity to improve standards and continuity for pupils in those schools where clear benefits are envisaged.

This report has been approved by the following officers:

Legal officer Financial officer Human Resources officer Estates/Property officer Service Director(s) Other(s)	Emily Feenan, Principal Lawyer, Legal Services Alison Parkin, Head of Finance (Children and Young People) Liz Moore, Strategic HR Manager John Sadler, Strategic Asset Manager Gurmail Nizzer, Acting Director of Commissioning Pauline Anderson, Interim Head of Quality Standards Iain Peel, Service Director for Learning and Skills
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For more information contact: Background papers: List of appendices:	Gurmail Nizzer – Acting Director of Commissioning 01332 642720 or gurmail.nizzer@derby.gov.uk None Appendix 1 – Implications Appendix 2 – Timeline Appendix 3 – Consultation Document
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IMPLICATIONS

Financial and Value for Money

- 1.1 The financial implications of one school closing and the other extending its age range are in some respects different from the closure of two schools and their replacement by a single new school. For most of the funding streams, the allocation for the “merged” school will be based on that of the school extending its age range, only with greater pupil numbers.
- 1.2 As far as the Schools funding formula is concerned, there will be a reduction of approximately £30,000 in terms of the current formula, across the two schools because of the removal of flat rate factors allocated to each school. The current regulations allows the merged school to retain 85% of the Base funding for the two schools which is currently set at £100,000 per school. (85% = £170,000 retained) This will be more than offset by the reduced costs of only having one Headteacher. Beyond that, the schools may be able to make further savings in the longer term.

Legal

- 2.1 School ‘mergers’ do not feature within the relevant regulations. Instead, mergers can be achieved through statutory procedures to close one school and simultaneously expand the age range of the linked school. The process involves consultation, publication of a statutory notice and consideration of the responses received. Subject to the outcome of this process, the implementation date is likely to be January 2018.
- 2.2 The statutory process for the proposal is prescribed under the Education and Inspections Act 2006 (as amended by the Education Act 2011), the School Organisation (Establishment and Discontinuance of Schools) Regulations 2013 and as set out in the School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013.

Personnel

- 3.1 The Council expects the budget for the merged schools will be sufficient to maintain sustainable levels of staffing set within the budgets of the separate schools. It will be the responsibility of the temporary governing bodies, in consultation with the authority, to determine a staffing structure for the new schools and the allocation of staff to posts within those structures. Any proposal for a new staffing structure would be subject to consultation with the relevant trade unions and professional associations.
- 3.2 Within the constraints of the powers of individual governing bodies, the People Services Department will do everything possible to facilitate employment at other schools or elsewhere within the Council if this became necessary.

IT

4.1 None arising from this report

Equalities Impact

5.1 None arising from this report.

Health and Safety

6.1 None arising from this report.

Environmental Sustainability

7.1 None arising from this report.

Property and Asset Management

8.1 If the two schools do merge, they will continue to operate within their existing buildings.

Risk Management and Safeguarding

9.1 If the proposal goes ahead, there will, inevitably, be a period of adjustment while the new structure settles down. On a day-to-day basis there will be no change in routine or provision in either school. It is anticipated that the children will benefit from the potential of a wider range of resources and improved staff development.

Corporate objectives and priorities for change

10.1 This report supports the Council priority outcome of 'Enabling individuals and communities, and Raising achievement and skills'.

**Brackensdale Infant and Junior Schools 'Merger' Proposal
Timeline**

Stages	Timeline
Six week consultation period including Governing Bodies, Headteachers, parents, teachers, staff, unions and ward members.	13 June 2017 to 25 July 2017
Briefing for Staff during consultation period	TBC
Meeting for parents during consultation period	TBC
Report outcome of consultation to Council Cabinet and seek approval to move to next stage which involves publishing a Statutory Notice.	August or September 2017
Advise Heads and Governors of outcome of Cabinet meeting.	Day after Cabinet meeting
Publication of Statutory Notice and circulation of Complete Proposal which marks the start of a four week representation period.	19 September 2017 to 17 October 2017
Decision by: Local Authority - Council Cabinet is the decision maker but this can be delegated to Director for People Services if no objections are received during the representation period. If objections are received, the decision should be taken by Council Cabinet.	October 2017, if no objections are received. If objections are received, DCC will have to report to Council Cabinet in November 2017
Implementation date – school opens as a primary	January 2018

Contact details

If you have any queries on the statutory consultation process, please contact:

Helen Zwart, Project Development Officer
Tel: 01332 642723 Email: helen.zwart@derby.gov.uk

Draft Consultation Document on the proposal to merge Brackensdale Infant School and Brackensdale Junior School

Tuesday 13 June 2017 to Tuesday 25 July 2017

To:

Parents, Staff, Governors, Trade Unions, Derby City Councillors (Ward Members), Derby City Diocesan Authorities and Local MP

Please let us know your views on our proposal to merge Brackensdale Infant School and Brackensdale Junior School to form a single primary school

Background

It is generally accepted that all-through primary schools offer certain advantages when compared with separate infant and junior schools. The benefits include continuity for pupils, flexibility and efficiency in terms of staffing resources and improvements in terms of admissions. Where separate infant and junior schools exist, some pupils attending the infant school may not be able to access a place at the linked junior school, due to the availability of places. This can cause significant disruption for pupils and frustration for parents.

Derby City Council is consulting on a proposal to 'merge' Brackensdale Infant School and Brackensdale Junior School to form a single primary school, within the existing school buildings, from January 2018. The Governing Bodies at Brackensdale Infant School, and Brackensdale Junior School both support this proposal to create a primary school.

The opportunity to consider the establishment of a primary school arises due to the retirement of the Headteacher of Brackensdale Infant School in July 2017. A merged primary school, of course, also provides the opportunity to continue to raise standards for our young people. The benefits in forming a primary are outlined in more detail below.

This consultation document tells you the reason for our proposal and how the decision making process works. Please take time to read the document and let us know your views and comments on the attached Consultation Response Form. The closing date for responses is **Tuesday 25 July 2017**. We hope you find the document helpful and informative.

What is the proposal?

A 'merger' is the joining of two or more schools into one, with a single governing body and headteacher. This would be achieved through the "closure" of the Infant School and the simultaneous expansion of the age range of the Junior School to form a single 3 to 11 primary school. Benefits of the 'merger' proposal are set out in the next section of this paper.

The schools' currently each have an admission number of 60. It is likely that there will be a proposal to increase the admission number to 75 in the future, to accommodate children from the new housing development at Manor Kingsway, which is in the schools' catchment area. If a separate school expansion proposal does move forward, it will be consulted on and new classrooms will be provided to accommodate the additional pupils, working closely with the school(s).

If the two schools do merge, they will operate within existing buildings and any new buildings provided to accommodate an increased admission number if the separate school expansion proposal moves forward.

What are the benefits?

The main benefits are:

- A single primary school would make the transition of pupils between years 2 and 3, from infants to juniors, smoother and better for pupils and their families with less chance of 'lost learning' at the beginning of year 3.
- Parents of Infant school children would not be required to apply for a place at the Junior school if the schools were to 'merge' to become an all-through Primary school. In an all-through *Primary* school children would move from year 2, to year 3, in the same way they would transition from any other school year to the next.
- The possibility to create a single and continuous approach to the curriculum, such as single policies for handwriting, reading, maths and behaviour.
- A single governing body bringing a single culture and ethos across the 3 to 11 age range.
- School budgets are based mainly on the number of children in a school. If these go up and down year to year, it causes instability and can lead to shortage of funding, job losses etc. This is often worse for smaller schools. Bigger schools, such as primaries, are better placed to cope with the fluctuations.
- One school uniform, the same policies and procedures, the same dates for staff training days and parents' evenings.
- A larger school has more capacity to introduce remodelled posts, such as a site manager or school business manager. This releases the Headteacher and senior managers to concentrate more on the business of raising achievement for all children.
- More development opportunities for the staff, such as shared training and the chance to work more closely across the curriculum and gain experience and understanding of all key stages.
- Better access for pupils and the families to extended services and facilities.
- Pupils having access to both schools gives greater opportunity to share resources and gives greater space for extended learning opportunities for all ages.
- The opportunity for both schools to keep improving and moving forward.

What will it mean for the children?

All of the above should have a positive impact on the quality of education that children receive. There will, inevitably, be a period of adjustment while the new structure settles down. On a day-to-day basis there will be no change in routine or provision in either school. It is anticipated that the children will benefit from the potential of a wider range of resources and improved staff development.

What will it mean for the Enhanced Resource Provision?

Brackensdale Infant and Brackensdale Junior School both provide enhanced resource places for children on the autistic spectrum or with speech and language disorders. There are no proposals to make any changes to this provision as a result of the proposed merger.

What will it mean in terms of organisation?

- There should be no immediate change in the way in which the schools are organised as a direct result of merger.
- The new school will receive a single budget based on pupil numbers. Conversion to a primary school gives, in the longer term, the Headteacher and governors greater flexibility in allocating staff and resources.
- The primary school would maintain the status of community school and there will be no change to admissions criteria. Children in year 2 would automatically have a right to transfer to year 3 without having to re-apply for a place.

What will it mean for the staff?

Again, very little on a day-to-day basis, but a merger will create greater stability and security. Apart from a change of school name to a primary school, staff contracts and conditions of service will not be affected.

An initial meeting on the proposal for staff at both schools took place on tbc.

What will it mean for parents/carers?

A merger will mean that the schools will continue to operate as usual and that parents/carers of pupils at both schools will continue to receive the same high level of quality provision. Parents/carers will not have to apply for a place in the junior part of the school once their child is on roll in the infant part of the school.

A meeting for parents on the proposal has been arranged to take place on tbc in the hall at tbc.

What will it mean for the Governing Body?

On an agreed date, the Governing Bodies at Brackensdale Infant School and Brackensdale Junior School will end, and be replaced with one Governing Body.

What happens now?

The consultation period starts on **Tuesday 13 June 2017** and ends on **Tuesday 25 July 2017**. Following this, Council Cabinet will consider the consultation comments and will decide whether to progress to the next stage of the process.

If proposals are to be taken forward, there will then be a further four week statutory consultation period. It is anticipated that a final decision would then be made by the Local Authority in October 2017 on whether to merge the schools. If merger does proceed then the primary school will be in place for January 2018.

How can I get more information on the proposal?

We are very interested in your views and welcome your comments. Please respond to us by using the Consultation Response Form attached to this paper. Should you wish to discuss any specific aspects of this proposal, please contact:

School Organisation and Provision Team
People's Services Directorate
Tel: 01332 642723
Email: yourcityyoursay@derby.gov.uk

Let us have your views

Your views are very important. Please do let us know what you think and whether you agree or disagree with the proposal by **Tuesday 25 July 2017**.

You can make your views known in the following ways:

- by completing the attached Consultation Response Form and returning it to us at the address provided at the end of the questionnaire.
- by using the online consultation response form at www.derby.gov.uk/brackensdale

Consultation Response Form: Proposed Merger of Brackensdale Infant School and Brackensdale Junior School

Your views are very important, please do let us know what you think.

Please tick the relevant box.

I am a:

Parent / Carer of an Infant school child
Parent / Carer of a Junior school child
Governor - Infant
Governor - Junior
Member of Staff - Infant
Member of Staff - Junior
Other (please state)

<input type="checkbox"/>

I support the merger of Brackensdale Infant School and Brackensdale Junior School to form a primary school

OR

I do not support the merger of Brackensdale Infant School and Brackensdale Junior School

Please add your comments below and attach additional sheets if necessary:

Please return your response form to:
School Organisation and Provision Team, Derby City Council, The Council House,
Corporation Street, Derby, DE1 2FS
or email your comments to yourcityyoursay@derby.gov.uk
by **Tuesday 25 July 2017**.



All information provided will be treated in accordance with the Data Protection Act 1998. We will only use this information to help in the decisions made on the proposed merger of Brackensdale Infant School and Brackensdale Junior School.