

Amalgamation of Hope CE Primary School, Worthen CE Primary School and St Mary's CE Primary School Westbury

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Summary

On 14 September 2016, Cabinet agreed to formally consult on the proposal to amalgamate Hope CE Primary School, Worthen CE Primary School and St Mary's CE Primary School Westbury in the academic year 2017/18, which will require the closure of the sites at Hope and Westbury and the enlargement of the current site at Worthen to accommodate the displaced pupils.

This report details the outcomes from the consultation and the recommendation of the Director of Children's Services to proceed to the next stage of the statutory process, with the publication of statutory proposals to close the two school sites.

Recommendations

Cabinet is recommended to:

- a. note the outcomes from the statutory consultation
- b. agree to proceed to the publication of closure proposals for Hope CE Primary School and St Mary's CE Primary School Westbury, with a target date of 1 September 2017, consolidating provision on an expanded site at Worthen CE Primary School.

REPORT

1. Risk Assessment and Opportunities Appraisal

- 1.1 There are no identifiable risk management issues involved in this proposal. School places will be made available at Worthen CE Primary for pupils displaced should Hope CE Primary and St Mary's CE Primary Westbury close. There are no known human rights issues resulting from this proposal.

- 1.2 The revised transport arrangements for those pupils displaced may lead to an increase in traffic and carbon emissions in the area of the Worthen CE Primary School and may result in some congestion outside the school site at key times of the day.
- 1.3 The communities serving all of the three schools, together with those in neighbouring areas, have been given the opportunity to comment on the proposal as part of the statutory consultation process. This statutory consultation is required to include consideration of risk management, human rights, equalities, community and environmental consequences.
- 1.4 In line with the Department for Education statutory guidance for opening and closing maintained schools, the proposal being presented to Cabinet is an amalgamation, comprising of the closure of one school (or more) and the enlargement of an existing school to accommodate displaced pupils.
- 1.5 The statutory guidance states that there is no prescribed timescale for implementation following any final decision by Cabinet to close a maintained school. While the target date is September 2017, there will need to be further discussions with the key stakeholders to confirm the actual date for implementation, with account taken of any requirements relating to, for example, the statutory consultation and determination of admissions arrangements, dissolution of the current federation and any other necessary permissions. Subject to the above, the intention is that the implementation takes place in the academic year 2017/18, at the earliest date possible.

2. Financial Implications

- 2.1 Continuing to run schools that, in both Ofsted and local authority assessment terms, are failing to provide a good standard of education for its pupils does not provide value for money. The majority of school revenue funding is pupil-led which means that the funding for the pupils resulting from the closure of the Hope and Westbury sites will be retained by the remaining school at Worthen or follow any pupils transferring to other Shropshire schools. The consolidation of provision at Worthen will make the single school more financially viable and sustainable than operating the three separate schools.
- 2.2 The redistribution of income, which will largely be retained within the remaining school in Worthen, means that there is no direct saving to the local authority or to the overall Shropshire schools' budget.

- 2.3 It is anticipated that the cost of transport will increase in the event that the provision is consolidated on a single site. Since September 2016, the schools have implemented interim operational arrangements for the provision of education, with children from Reception to Year 6 being taught on the Worthen site. The schools are currently funding the transport costs for these arrangements, with an estimated full year cost of £30,000. The costs for entitled pupils will have to be met by the Council from the academic year 2017/18 onwards in the event that the amalgamation is approved, as prescribed within the Council's School Transport Policy.
- 2.4 The school buildings at all of the three schools are owned by the Diocese of Hereford, while the school land at Hope is owned by Shropshire Council. The land at Westbury is leased from the Westbury Playing Fields Trustees. Capital works will be required on the Worthen site to accommodate the pupils from the three schools and to allow for growth in pupil numbers to recover the numbers lost in the last year. Local authority officers are undertaking a feasibility study on the potential expansion works on the Worthen site in the event that the closures go ahead.
- 2.5 The Diocese of Hereford have confirmed that the receipts from the disposals of the Hope and Westbury sites will be made available to support the funding of remodelling works at the Worthen site. The Diocese will be applying for Secretary of State agreement under Section 554 of the Education Act 1996 for approval to dispose of the buildings. The Council will be required to secure similar approval through Section 77 of the Schools Standards and Framework Act 1998 and Schedule 1 to the Academies Act, regarding the disposal of the land at the Hope site. The Secretary of State approval will be conditional on any capital receipts being used for educational purposes. This funding will be required for the capital works at Worthen.

3. **Background**

- 3.1 On 14 September 2016 Cabinet considered and approved a proposal to consult on the amalgamation of Hope CE Primary School, Worthen CE Primary School and St Mary's CE Primary School Westbury. The subsequent consultation ran for a six week period from 22 September to 2 November 2016.
- 3.2 A broad range of strategies were employed to inform stakeholders of the consultation process and collect views, including: the publication of a consultation document; the posting of the document on the Shropshire Council consultation web portal and the school website; the signposting of the portal to all the statutory and recommended consultees; and minuted meetings with staff, governors and stakeholders (separate meetings were held at each of the school sites).
- 3.3 The responses to the consultations have informed this report.

4. **Proposal**

- 4.1 The Hope Worthen Westbury Trinity – A Federation of CE Primary Schools was established in May 2016, bringing together the three schools under the leadership of a single governing body and an acting headteacher. In July 2016 the federation appointed a permanent headteacher.
- 4.2 While the title of the federation includes the word ‘Trinity’, this relates to the coming together of three schools and has nothing to do with Trinity CE Primary School in Ford, which has no formal association with the federation.
- 4.3 All three schools have faced substantial challenges in recent years, including the recruitment and retention of headteachers for each school and other teaching staff, Ofsted inspection judgements that were not yet good for two of the schools, falling pupil numbers and the associated pressures this has had on the schools’ budgets.
- 4.4 Westbury currently has a ‘Requires Improvement’ judgement from Ofsted, while Hope was judged as ‘Good’ at its last inspection. Worthen, following an Ofsted inspection on 8 and 9 November 2016, has been graded ‘Good’ having previously been graded ‘Requires Improvement’. The positive action by the leadership of the federation to change has resulted in this significant improvement. Despite this, the outcomes for pupils across the wider federation remain volatile and the capacity to improve more limited than in larger schools.
- 4.5 The three schools have collectively lost 29 pupils between January 2016 and the annual school census in October 2016, down from 114 to 85 (down nearly a quarter). The fall in pupil numbers is in part due to the cohort sizes in the individual schools being so small, with parents citing this as their main reason for removing children. With pupil numbers being the key basis on which schools receive their annual funding, this means that revenue is falling and budgets are and will become increasingly difficult to balance.
- 4.6 The governing body of the federation has a responsibility for, and a strong commitment to, securing and sustaining good or better outcomes for all their pupils. It is their view that this cannot be achieved with the current organisational structures and so governors have been considering an alternative arrangement, based on consolidating provision onto a single site.

- 4.7 This is reflected in the federation's vision for the longer term future of education in their community:
'We will actively explore the benefits of bringing the children together on one site. As pupil numbers are predicted to remain low at all three schools well into the future and therefore funding for our schools continues to be greatly reduced, we will investigate whether the children will receive a higher quality of education, care and social interaction in one school.'
- 4.8 From the start of the autumn term in September 2016, pupils of school age from all three schools have been taught on the Worthen site, whilst pre-schools have remained open at Hope and Westbury. This has had a number of advantages already, with pupils having the opportunity to learn and socialise in bigger groups of children of their own age. Children are no longer taught in whole key stage classes, but in classes spanning no more than two year groups. Staff have had the opportunity to plan and collaborate together, offering more opportunities for continuing professional development. The division of roles and responsibilities across a larger team of staff has created more capacity for teachers to ensure quality first education. New arrangements such as transport have worked smoothly.

5. **Consultation**

- 5.1 On 22 September 2016 the Council began a statutory six week period of consultation on the proposal. A consultation document was signposted to all prescribed and recommended consultees and posted on the Council's consultation web portal. The consultation ended on 2 November 2016. The consultation document is attached for reference at Appendix 1a, together with the list of formal consultees at Appendix 1b.
- 5.2 Council officers attended separate consultation meetings with school staff and governors at Worthen CE Primary School on 11 September 2016. Copies of the notes of these meetings are attached at Appendices 2a and 2b.
- 5.3 Public meetings were held at the three separate school sites of Hope, Worthen and Westbury on 13 September 2016. Copies of the notes for each of these meetings are attached at Appendices 3a, 3b and 3c.
- 5.4 The majority of responses to the consultation were received via email. At the close of the consultation period at midnight on 2 November 2016, 5 emails had been received, one of which was on behalf the governing body of Hope Worthen Westbury Trinity – A Federation of CE Primary Schools. Only one letter was received, from Philip Dunne, MP for Ludlow. The responses received are attached at Appendix 4.

6. Key Issues and Factors for Consideration

6.1 The key issues and factors for Cabinet to consider are the effect of the amalgamation on the following:

- standards of education
- local communities
- equal opportunities and community cohesion
- diversity of provision
- demography and population
- finances
- staffing.

6.2 Effect on Standards of Achievement

6.2.1 While responses to the consultation were limited, the references within them on the standards of education were positive. The consultation took place the first half-term of the interim operational arrangements introduced by the governors in September 2016 for the education provision for Reception to Year 6 pupils being delivered on the Worthen site. As such, the responses reflected views on the consolidated education provision as it will operate in the event that Cabinet approve the amalgamation. While the comments reflect initial apprehension and concern at the start of the autumn term, these appear to have been quickly allayed as the potential benefits of the consolidation have begun to be realised and the immediate impact on pupil's learning evidenced.

6.2.2 The Ofsted inspection of Worthen CE Primary School, which took place in the week after the consultation period closed, provides further evidence of the real and potential impact on standards of achievement from the federation's actions. As a 'Good' rated school, the "highly effective headteacher has had a clear impact on the school's improvement" and the "headteachers' and governors' work to communicate their ideas and plans to parents and pupils has been successful", reflected in the "highly positive responses to Parent View and in parents' discussions with the inspector during the inspection". The inspector also commented that there is a "harmonious atmosphere in the school; pupils mix well and enjoy the additional opportunities and friendships offered by the federation arrangement".

6.2.3 The local authority's view is that the rationalisation of the provision on to a single site will provide a range of benefits, some of which are already being realised through the interim operational arrangements:

- improved curriculum that is more appropriate to the age of the children as they will be in classes of only two year groups rather than a whole key stage
- opportunity to improve educational outcomes through more targeted teaching in smaller classes/groups and a better range of subject specialism
- wider opportunities for personal and social development, including through broader friendship groups, as there are more children in the school

- opportunity to distribute leadership and management, as well as subject and aspect roles and responsibilities, benefiting children's learning and staff in terms of continuing professional development and a more even distribution of workload
- provision of a wider range of specialist teaching as a larger school workforce opens access to different specialisms, for example, music, modern foreign languages, physical education and sport.

6.3 Effect on the Local Community

6.3.1 Hope CE Primary School and St Mary's CE Primary School Westbury are both designated by the Department for Education as rural schools and therefore any case for closure has to be strong and a proposal in the best interests of education in the area. Cabinet are required to give consideration to:

- the likely effect of closure on the local community
- the availability, and likely cost to the local authority, of transport to other schools
- any increase in the use of motor vehicles likely to result from the closure, and
- any alternatives to the closure of the school.

6.3.2 The consultation responses indicate a sadness at the loss of schools in the communities of Hope and Westbury, but an acknowledgement that the decision of the governing body to consult on the amalgamation provides the best opportunity for securing good or better educational outcomes for the pupils in their communities. The consultation responses suggested there would be some impact on the area, citing examples such as poor numbers attending the local show in Hope, and the closure of the local shop (this was not directly attributed to, and pre-dates, the current proposal).

6.3.3 The likely effects on the communities of Hope and Westbury have been considered in the light of experience gained from school closures which have taken place in Shropshire and elsewhere. If the schools were to close, the communities might become less attractive to some families, but it would not necessarily have an effect on most potential residents. It might change the balance of the type of potential residents without affecting their numbers.

6.3.4 There are a number of settlements in the surrounding area which currently do not have schools but remain viable. Some of these are already part of the community of other neighbouring schools. Schools would naturally seek to remain a focal point of not just their immediate settlement, but also the wider community as a whole.

- 6.3.5 The headteacher and governors of the Hope Worthen Westbury federation have made clear their intentions to retain close relationships with the two communities of Hope and Westbury through a range of measures including involving pupils with village fetes and celebrations, church services and remembrance day events, for example. There is currently no community use of the school facilities in the three schools by local groups.
- 6.3.6 Other activities already take place in the communities, using the village halls in each of the villages, all of which could continue to be focal points of community activity if the schools were to close.

Early Years Provision

- 6.3.7 The closure of Hope CE Primary School and St Mary's CE Primary School Westbury would have an impact on local early years provision.
- 6.3.8 Hope CE Primary School and St. Mary's CE Primary School Westbury both have pre-schools as part of their provision, while Worthen Pre-school is independently operated by a parent managed charitable group and runs from the village hall, next to the school. The operational arrangements implemented by the governing since September 2016 have not included the pre-schools which have remained open at Hope and Westbury.
- 6.3.9 Continued affordable and accessible early years provision is seen as being very important to the local community and the future success of the amalgamation. This is borne out by the responses received during the consultation period.
- 6.3.10 The governors would like to bring together the current mix of school led and voluntary managed early years provision into one, school run nursery on the Worthen site. The expectation would be for the nursery to open from 9 am to 3.00 pm, 5 days per week. The school will fully consult and work with their early years staff and the managers of the voluntary managed provision at Worthen.
- 6.3.11 The Council has already set aside resource from the capital programme for the development of early years provision in the area. This funding will be allocated towards the capital works required at the Worthen site. The provision will form part of the build on the school site, with staff accessing facilities - eg staff room and toilets - from the main school building rather than requiring their own and thus increasing capital costs.

6.3.12 As the early years provision is not directly part of the amalgamation proposal, local authority officers, in partnership with the school, are seeking to commission the capital works ahead of the Cabinet decision in March 2017. These capital works will, however, have due consideration and allow for a further phase of development for expanding the mainstream accommodation in the event that Cabinet approve the amalgamation.

6.3.13 The consultation highlighted the issue of transport for a number of small vulnerable families in Westbury to take up their early years entitlement if it is located at Worthen. The Council is not required to provide transport for nursery provision but is committed to working with the school to resolve this issue.

Home to school transport

6.3.14 The Council's School Transport Policy provides for – in the event of school closure and over the distance qualification of two or more miles – free transport to the catchment area or next nearest schools through to the end of the in-area pupils' primary phase education.

6.3.15 If the schools close, pupils who live within the existing Hope CE Primary School and St Mary's CE Primary School Westbury catchment areas and attend the schools (at the time of closure), and transfer to Worthen CE Primary School, as directed by the local authority at the end of the summer term 2017, would be eligible for free home to school transport dependent on the distance criteria. In future years other pupils would be assessed for free transport eligibility in line with the Council policy at the time. Where pupils do not qualify for free school transport, the Council would encourage parents to use shared transport where this is practical.

6.3.16 While the federation is currently meeting the costs for transporting Hope and Westbury pupils to Worthen as a result of the interim operational arrangements, these costs will need to be borne by the local authority, in line with Council policy, if the decision is taken to amalgamate the schools. In a full year these costs are estimated to be £30,000.

6.3.17 During the consultation, confirmation was sought on whether the existing arrangement of Powys County Council funding the transporting of pupils living in White Grit in Powys to Hope CE Primary School would continue. Powys are currently funding the transport of the pupils to Worthen. Council officers have been in touch with Powys to establish their intentions regarding existing pupils and siblings in the event of the amalgamation proceeding – they have yet to confirm their position.

- 6.3.18 Children on roll at Hope CE Primary School have historically transferred to Bishop's Castle Community College at the end of Year 6. Clarification was sought during the consultation on whether free transport would be provided if the pupils from this community elected to go to Mary Webb School & Science College, where Year 6 pupils from Worthen and Westbury have tended to transfer to. The Passenger Transport Commissioning Group have advised that free school transport is provided to the nearest or catchment area secondary school where the distance is over three miles. Where there are pupils whose addresses are within the Bishop's Castle Community College catchment area, but the nearest school is Mary Webb School & Science College, free school transport will be considered to Mary Webb School & Science College where the statutory walking distance is met.
- 6.3.19 Concerns were raised at the Westbury public meeting on 13 September regarding the safety of pupils who are part of the pick-up/drop-off arrangements introduced at the beginning of the autumn term for transporting pupils to Worthen. The Council's Passenger Transport Commissioning Group have been in touch with the current school transport provider who would be prepared to pick up at the village hall if this was the preferred pick-up/drop-off point.

Increase in Use of Motor Vehicles

- 6.3.20 It is understood that there may be some increased carbon emissions from increased vehicular travel if the school were to close. This might, in part, be offset by the loss of any environmentally detrimental effect that the daily running of the school sites at Hope and Worthen might produce, such as emissions from heating and lighting, although this itself would be dependent upon the sites' use under new ownership.
- 6.3.21 The majority of pupils from Hope and Westbury are being transported to Worthen by bus as part of the changes introduced at the beginning of the autumn term. In the event that the amalgamation proposal is approved, it is presumed that these arrangements will continue and minimise the numbers of motor vehicles being used to transport pupils to school.

6.4 Effect on Equal Opportunities and Community Cohesion

- 6.4.1 No issues in relation to equal opportunities and community cohesion were raised as part of the consultation process. The pupils from the three schools are being treated equally in terms of accessing an appropriate education and there will be no effect from the proposal on race relations or racial equality.

6.5 Effect on Diversity of Provision

6.5.1 Cabinet, as decision-maker, should not approve the closure of a school with a religious character where the proposal would result in a reduction in the proportion of relevant denominational places in the area. The current capacity of the three schools is 217 – the amalgamation, and the expansion of the Worthen site to a capacity of 150, will result in a net reduction of 67 places. Given that the three schools are part of the Diocese of Hereford, and the amalgamated school will remain part of the Diocese, there is no effect on the diversity of provision from this proposal.

6.6 Effect on Demography and Population

6.6.1 The three schools have experienced an aggregate reduction in pupil numbers of nearly a quarter between January 2016 and the school census in October 2016. Some of the reasons for the reduction are outlined in section 4 above. The governing body are aware of the need to get these numbers up to previous levels from their current low and are already taking measures to address this.

6.6.2 As with many communities across Shropshire, this area of Shropshire is experiencing forecast reductions in pupil numbers through to the end of the decade. The forecast pupil numbers in the combined catchment area over the next few years are: 2017/18 – 28, 2018/19 – 20 and 2019/20 – 18.

6.6.3 The decision of the governing bodies of the three schools to, in the first instance, federate and then to initiate a consultation of school amalgamation is, in part, down to a recognition of the need to address and secure sustainable education provision in the area against a backdrop of falling school rolls.

6.7 Effect on Finances

6.7.1 There were 85 pupils on roll across the three schools in the October 2016 school census. The October census data is very important as it is used in the school funding formula for the following financial year. In October 2015, there were 121 pupils on roll across the three schools. The impact of the reduction in pupil numbers will see the combined school budgets reduce in the financial year 2017/18 by an estimated £117,000.

6.7.2 The closure of the two sites and consolidation on a single site is technically an amalgamation. The current school funding formula rules allow for a lump sum protection where schools amalgamate. This means that, based on an amalgamation in September 2017, the three lumps sums will be retained in the financial year 2017/18, 85% of the combined three lump sums will be retained in the financial 2018/19 and a single lump sum will apply from the financial year 2019/20 onwards.

6.7.3 This will provide some essential stability in revenue funding terms in 2017/18 and 2018/19. However the governing body have already recognised the need to increase pupil numbers back to October 2015 levels in order to secure a balanced budget from 2019/20 onwards and are taking active measures to do so. The 'Good' Ofsted judgement for Worthen CE Primary School will assist in recruiting pupils.

6.8 Effect on Staffing

6.8.1 If the decision is taken to close the schools at Hope and Westbury, the Council would work with the staff, governing body and trades unions to secure the ongoing employment of the current workforce, which for the majority will be at Worthen. Staff had their own meeting on 11 September 2016 (attached in Appendix 2a) at which they were provided with additional information and had the opportunity to ask further questions. A comprehensive support framework for staff would be put in place in the event of closure. The aim would be for anyone who wants to remain employed by Shropshire Council to secure employment with another school or service.

6.8.2 The three schools currently employ 23.5 FTE staff – 5.0 FTE teaching and 18.5 FTE non-teaching staff.

7. Consideration of Alternative Proposals

7.1 No Change to Present Arrangements

7.1.1 None of the responses received to the consultation disagreed with the proposal to amalgamate the three schools. The fact that the schools are already federated and, in particular, have been operating on the Worthen site since September 2016, has provided a unique opportunity to test the proposed model and to demonstrate a 'proof of concept'. The evidence from the first half-term of consolidating provision from Reception through to Year 6 at Worthen has been generally well received from pupils, parents and staff alike.

7.1.2 If the decision is taken by Cabinet to formally approve the amalgamation, the transition to a single school in the academic year 2017/18 should be relatively smooth given that the staff and pupils will have been operating in this way for a full academic year. The move back to previous arrangements or to any others are not being considered.

7.2 Academisation

- 7.2.1 The governing body are aware of the Government's policy direction and their ambition that all schools will become academies by 2020, forming a fully school-led system. However, the governor's priority and focus at the present time is to fully and effectively implement their operational arrangements in the current academic year and then, subject to Cabinet approval, formally amalgamate the schools 2017/18 and grow pupil numbers.
- 7.2.2 The governors will continue to monitor national and local developments and their options for academisation, in particular consideration on joining a multi-academy trust, and will make a judgement on the timing of their conversion to academy status.

7.3 Continue to Next Stage of Proposal to Close

- 7.3.1 Cabinet need to be satisfied that the improvement in educational outcomes from the proposed amalgamation will be secured and sustained in the medium to long term. They need to consider the impact of the fall in pupil numbers and be satisfied that the amalgamation would not have a negative impact on the financial sustainability and educational outcomes of the single school going forward.

7.4 Conclusion

- 7.4.1 The proposal to amalgamate Hope CE Primary School, Worthen CE Primary School and St Mary's CE Primary School Westbury in the academic year 2017/18 is about securing the most effective provision for the pupils in the area. This proposal has been prompted and initiated by the community through the governing body of the federation. It is fully supported by education officers of both Shropshire Council and the Diocese of Hereford.
- 7.4.2 The Director of Children's Services recommends that Cabinet approve the publication of the formal notices to close Hope CE Primary School and St Mary's CE Primary School Westbury at the earliest possible opportunity in the academic year 2017/18 and to consolidate provision on the expanded Worthen CE Primary School site.

8. Next Steps

- 8.1 If Cabinet accepts the recommendation of the Director of Children's Services to proceed to a formal proposal to close Hope CE Primary School and St Mary's CE Primary School Westbury, the next step would be to publish the statutory proposals to give effect to this decision.

- 8.2 Publication of such proposals would be followed by a four week representation period – 12 January to 8 February 2017 - during which period comments would be invited from interested parties. These comments, along with those from the six week consultation period, will be made available to Cabinet members for consideration in making a decision.
- 8.3 Following the representation period a further report would be presented to Cabinet on 1 March 2017, detailing the outcome of this stage of consultation and seeking a decision on whether to proceed with the proposal to close Hope CE Primary School and St Mary's CE Primary School Westbury during the financial year 2017/18 and to consolidate provision on an expanded Worthen CE Primary School site.

<p>Cabinet Member (Portfolio Holder) David Minnery</p>
<p>Local Member Heather Kidd – Chirbury & Worthen David Roberts - Loton</p>
<p>Appendices</p> <ul style="list-style-type: none"> 1a. Consultation document 1b. List of consultees 2a. Staff consultation meeting – 11 September 2016 2b. Governor consultation meeting – 11 September 2016 3a. Public consultation meeting – Hope – 13 September 2016 3b. Public consultation meeting – Worthen – 13 September 2016 3c. Public consultation meeting – Westbury – 13 September 2016 4. Consultation responses