

<b>CABINET</b>	<b>Paper No.</b>
<b>Meeting date: 3 July 2007</b>	
<b>From: Cabinet Member for Children's Services and Corporate Director – Children's Services</b>	

**SCHOOL ORGANISATION : A STRATEGIC APPROACH –  
CHANGES TO THE DECISION MAKING PROCESSES AND  
POTENTIAL INFANT/JUNIOR SCHOOL AMALGAMATIONS**

**SECTION A:  
RECOMMENDATION OF CABINET MEMBER**

**1.0 EXECUTIVE SUMMARY**

- 1.1 *This paper concerns recent legislation that alters the decision-making processes for school organisation change. It also deals with the potential amalgamation of three pairs of infant and junior schools.***
- 1.2 *It begins by outlining the variations to and the implications of the decision-making processes relating to school organisation change that came into effect on 25 May 2007.***
- 1.3 *It then goes on to ask members to take decisions on whether the amalgamation of Belle Vue Infant and Junior Schools in Carlisle and Beaconside C of E Infant and Junior Schools in Penrith, as set out in legal notices, should be approved.***
- 1.4 *Finally, it reports on the outcome of the public consultation exercise concerning Brampton Infant and Junior Schools and asks Members to take decisions on whether they feel that processes aimed at securing the amalgamation of the two schools should move forward.***

## **2.0 POLICY POSITION, BUDGETARY AND EQUALITY IMPLICATIONS AND LINKS TO CORPORATE STRATEGY**

### **Policy Position**

- 2.1 The potential infant and junior school amalgamations, which this report focuses on, represent school organisation change.**
- 2.2 The policy position on school organisation matters is set out in the 7 September 2005 Cabinet paper 'School Organisation – A Strategic Approach'.**
- 2.3 The document 'Enhancing Lives Through Learning – A Vision for Schools in Cumbria', which was approved by Cabinet on 28 February 2006, underpins and guides the Authority's school organisation processes.**

### **Budgetary Implications**

- 2.4 There are no significant implications for the levels of revenue budgets. School organisation change can, however, free-up existing resources to be put to alternative use in or for other schools.**
- 2.5 As far as capital expenditure is concerned, the potential school organisation changes identified in this report would require funding to secure their implementation. The Authority has already, with the CE diocese, reserved a capital allocation from the LCVAP in 2007/08 to facilitate the possible amalgamation of Beaconside Infant and Junior Schools. This assumes the resultant primary school would be voluntary aided. Provision for the other potential changes is made in the Authority's Capital Plan.**

### **Links to the Council Plan**

- 2.6 The basic thrust of the strategic approach to school organisation is to safeguard and improve the education and other services to children and their families provided through schools in the County.**
- 2.7 This is supportive of the Plan's themes, 'Improving Council Services' and 'Children and Young People'.**

### **3.0 RECOMMENDATIONS**

*Cabinet is invited to:*

- 3.1 Note the changes to the school organisation decision-making processes covered in paragraphs 4.1 – 4.5.**
- 3.2 Agree, in order that the majority of final decisions on school organisation change can be taken locally by Cabinet, that the Constitution Review Group consider, as soon as possible, revised arrangements for school organisation matters to be dealt with by Cabinet and the Scrutiny process.**
- 3.3 Approve the statutory proposal to close Belle Vue Junior School and the linked proposal to enlarge and extend the age range of Belle Vue Infant School from 4-7 to 4-11.**
- 3.4 Approve the statutory proposal to close Beaconside CE Junior School and the linked proposal to enlarge and extend the age range of Beaconside CE VA Infant School from 3-7 to 3-11.**
- 3.5 Agree that all necessary action be taken to seek to achieve the 'amalgamation' of Brampton Infant and Junior Schools, including the publication of a statutory proposal to close the Infant School and support for a proposal by the governors to enlarge and extend the age range of the Junior School from 7-11 to 3-11.**

**Philip Chappelhow  
Cabinet Member for Children's Services**

## **SECTION B:** **ADVICE OF CORPORATE DIRECTOR – CHILDREN’S SERVICES**

### **4.0 BACKGROUND**

#### **Changes to the Decision Making Processes**

- 4.1 New regulations concerning the decision-making processes relating to school organisation proposals became law on 25 May 2007.
- 4.2 The main change was the abolition of School Organisation Committees which previously made most decisions on school organisation proposals. From 25 May, the relevant local authority (in the case of Cumbria, the County Council) became responsible for making the majority of such decisions on proposals affecting maintained schools in the county. As for other decisions on school organisation issues, decisions on whether to approve statutory proposals are for Cabinet to take.
- 4.3 The DfES has issued sets of guidance relating to the new legislation aimed at proposers of school organisation change and decision-makers dealing with statutory proposals. The documents concerned have been previously provided for Cabinet Members so that reference can be made to them when considering whether to publish statutory proposals or whether to approve them after their publication. Attention is drawn to aspects of the guidance which are key to the specific proposals being considered at appropriate points in the report.
- 4.4 A decision on a proposal is required to be made within 2 months of the end of the period for representations which follows its publication otherwise the proposal has to be sent to a DfES appointed adjudicator to take the decision. Given that, in making these changes in legislation the Government envisaged that the vast majority of the decisions on formal proposals would continue to be made locally, Members would presumably wish that to happen here in Cumbria. It may be that, in order for the Council to ensure that this occurs, special meetings of the Cabinet are held as and when felt to be appropriate. Consideration should also be given to the timescales built into the Scrutiny process to make sure that in the particular case of school reorganisation issues any call-in and referral back to Cabinet can be dealt with within the two month period.
- 4.5 There is a limited right of appeal against almost all local authority decisions on statutory school organisation proposals. The following bodies have such a right:-
- The local Church of England diocese
  - The Bishop of the local Roman Catholic diocese
  - The local LSC where the school involved provides education for pupils aged 14 and over

- The governors and trustees of the foundation or voluntary school involved where the local authority publishes the proposals

## **Specific Decisions to be made under the New Arrangements**

### **General Introduction**

- 4.6 This section of the report concerns formal proposals which, if approved and implemented, would have the effect of securing the amalgamation of two pairs of infant and junior schools in the north of the county.
- 4.7 The guidance referred to in paragraph 4.3 requires decision-makers to consider whether:
- all necessary information is available to them when taking a decision;
  - the formal proposals meet statutory requirements;
  - the statutory consultation was appropriately carried out before the formal proposal was published.
- 4.8 In relation to the formal proposals which are the subject of this report, the answer is yes. All relevant information is provided in this report and its appendices, the published notices were checked for compliance by the DfES and the Authority's solicitors prior to their publication and the consultation exercises were undertaken in line with the relevant Government guidance.

### **Belle Vue Infant and Junior Schools, Carlisle**

#### **Background**

- 4.9 A consultative paper relating to the potential amalgamation of Belle Vue Infant and Junior Schools was issued in January 2007 and consultation meetings were held on 7 February 2007 with a subsequent period for written responses.
- 4.10 Cabinet considered the outcome of the consultation exercise at its meeting on 3 April 2007. The relevant paper and its appendices are attached as Appendix A. Taking account of the response to the consultations and the arguments for change presented to it, Members agreed to support an amalgamation of the schools.
- 4.11 Formal proposals designed to lead to the amalgamation of the two schools were published on 20 April 2007. In terms of details, it was proposed to:-
- Close Belle Vue Junior school

and

- Enlarge and extend the age range of Belle Vue Infant School to create a 4-11 community primary school in the existing premises of both schools on 1 September 2008.

A copy of the proposals is provided in Appendix B.

- 4.12 No objections or other representations were received during the period for responses which ended on 1 June 2007.
- 4.13 The primary aim of the proposals is to offer the opportunity, through the better focussing of resources, curriculum planning for the full 4 -11 age group and other factors, of enhanced educational standards for the future.
- 4.14 If the proposals are approved, some extension/remodelling of the existing school buildings would be undertaken. This would be funded through the schools' 'formula capital' allocations and from the Council's Capital Programme. This information will satisfy the Cabinet, as the decision-maker and as requested in the DfES guidance, that the capital resources to implement the proposals will be available.

#### Justification for the Approval of the Proposals

##### General

- 4.15 The case for the proposed adjustment to primary education in the Belle Vue area of Carlisle is supported by the data contained in this report and its appendices. Set out in this section are the main arguments and case for the approval of the proposals.
- 4.16 The Authority's long-standing preference is for all-through (i.e. 3/4-11) primary schools. Amongst the reasons for this are that, all other things being equal, it is felt they offer:-
- Better continuity of education.
  - More financial efficiency.
  - Greater organisational and educational flexibility.

This preference is included in the document 'Enhancing Lives Through Learning – A Vision for Schools in Cumbria'. This was produced by the School Organisation Forum and approved by Cabinet in February 2006. The document underpins and guides the Authority's school organisation processes.

- 4.17 There is a range of factors set out in the statutory guidance which need to be considered when decisions on school organisation changes are being made. These are summarised in Appendix C. As indicated earlier, Members have the full relevant guidance documents to which they should refer. It is felt that those factors which are relevant to the Belle Vue situation have been taken account of in preparing the consultation document, in writing this paper and in the specific recommendation to Members which the paper contains. Nevertheless, Members as decision-makers need to satisfy themselves that

the relevant factors are considered when they are contemplating the decisions to take.

#### The Outcome of the Consultation Process

- 4.18 The guidance indicates that decision-makers should consider the views of those affected by the proposals.
- 4.19 As Members will see from Appendix A, the governing bodies of both schools and almost all of those who responded to the consultation exercise supported the amalgamation of the two schools.
- 4.20 Both governing bodies indicated in letters received subsequent to the end of the consultation period that they were agreed on a preferred way of bringing the two schools together. This was reflected in the statutory proposals which the Cabinet agreed to make.
- 4.21 There were no objections (or representations) to the proposals.
- 4.22 The approval of the proposals would therefore be in line with the outcome of the consultation exercises undertaken.

#### Further Information/Comment

- 4.23 The educational, financial and social arguments for merging separate infant and junior schools to form all-through primary schools are believed to be very strong.
- 4.24 The governors of the two schools are working closely together to prepare for the proposed changes on the assumption that they will be approved. They have formed a joint working party to move planning forward generally. The preparation of a scheme to adjust the existing school buildings to enable them to better support the operation of a single 4-11 primary school is well underway. Governors are fully involved in this.

### **Beaconside Infant and Junior Schools, Penrith**

#### Background

- 4.25 A consultative paper relating to the potential amalgamation of Beaconside C of E Infant and Junior Schools was issued on 8 February 2007. Consultation meetings were held on 28 February 2007 with a subsequent period for written responses.
- 4.26 Cabinet considered the outcome of the consultation exercise at its meeting on 3 April 2007. The relevant paper and its appendices are attached as Appendix A. Taking account of the response to the consultations and the arguments for change presented to it, Members agreed to support an amalgamation of the schools.
- 4.27 Formal proposals designed to lead to the amalgamation of the two schools were published on 20 April 2007. In terms of details, it was proposed to:-
- Close Beaconside C of E Junior school

and

- Enlarge and extend the age range of Beaconside C of E Infant School to create a 3-11 C of E voluntary aided primary school in the existing premises of both schools on 1 September 2008.

A copy of the proposals is provided in Appendix D.

- 4.28 No objections or other representations were received during the period for responses which ended on 2 June 2007.
- 4.29 The primary aim of the proposals is to offer the opportunity, through the better focussing of resources, curriculum planning for the full 3 -11 age group and other factors, of enhanced educational standards for the future.
- 4.30 If the proposals are approved, some remodelling of the premises of the existing schools would be undertaken. As a Voluntary Aided School grant aid from the Department of Education and Skills would be required. This will be funded through the new school's 'devolved formula capital allocation' and from the Locally Controlled Voluntary Aided Projects (LCVAP) funding programme for Voluntary Aided Schools from which funding has already been earmarked.

#### Justification for the Approval of the Proposals

##### General

- 4.31 The case for the proposed adjustment to primary education in the East of Penrith is supported by the data contained in this report and its appendices. Set out in this section are the main arguments and case for the approval of the proposals.
- 4.32 The Authority's long-standing preference is for all-through (i.e. 3/4-11) primary schools. Amongst the reasons for this are that, all other things being equal, it is felt they offer:-
- Better continuity of education.
  - More financial efficiency.
  - Greater organisational and educational flexibility.

This preference is included in the document 'Enhancing Lives Through Learning – A Vision for Schools in Cumbria'. This was produced by the School Organisation Forum and approved by Cabinet in February 2006. This document underpins and guides the Authority's school organisation processes.

- 4.33 There is a range of factors set out in the statutory guidance which need to be considered when decisions on school organisation changes are being made. These are summarised in Appendix C. As indicated earlier, Members have the full relevant guidance documents to which they should refer. It is felt that



those factors which are relevant to the Beaconside situation have been taken account of in preparing the consultation document, in writing this paper and in the specific recommendation to Members which the paper contains. Nevertheless, Members as decision-makers need to satisfy themselves that the relevant factors are considered when they are contemplating the decision to take.

#### The Outcome of the Consultation Process

- 4.34 The guidance indicates that decision-makers should consider the views of those affected by the proposals.
- 4.35 As Members will see from Appendix A, the governing bodies of both schools and almost all of those who responded to the consultation exercise supported the amalgamation of the two schools.
- 4.36 Both governing bodies indicated during the consultation period that they were agreed on a preferred way of bringing the two schools together. This was reflected in the statutory proposals which the Cabinet agreed to make.
- 4.37 There were no objections (or representations) to the proposals.
- 4.38 The approval of the proposals would therefore be in line with the outcome of the consultation exercises undertaken.

#### Further Information/Comment

- 4.39 The educational, financial and social arguments for merging separate infant and junior schools to form all-through primary schools are believed to be very strong.
- 4.40 The governors of the two schools are working together to prepare for the proposed changes on the assumption that they will be approved. The preparation of a scheme to adjust the existing school buildings to enable them to better support the operation of a single 3-11 primary school is well advanced. Both sets of governors are fully involved in this.

#### **Reasons for Decisions**

- 4.41 Decision-makers are required to identify the reasons for the decisions they take on school organisation proposals. Should Members decide to approve the proposals relating to the Belle Vue and Beaconside Schools, it is suggested that the key points in this section of the report covering the justification for approving the proposals should be used in compiling the reasons for the decision.

#### **Specific Decisions on whether to Publish Formal Proposals**

##### **Brampton Infant and Junior Schools**

#### The General Context

- 4.42 As part of the strategic approach to school organisation which involves the review of schools throughout Cumbria, the governors of Brampton Infant and

Junior Schools wrote to the Authority requesting that serious consideration be given to the amalgamation of the two schools.

- 4.43 Following a recommendation from the School Organisation Forum to that effect, the Cabinet, at its meeting held on 3 April 2007, agreed to undertake the necessary consultations.

#### Specific Background

- 4.44 The review involved whether or not to amalgamate Brampton Community Infant and Brampton Foundation Junior Schools.
- 4.45 Because the schools share the same catchment area, a single series of consultation meetings took place on 14 May 2007. In line with established practice, there were separate meetings involving staff, governors and parents/public. In addition a meeting was held with the junior school pupil council. The meetings and the consultation process more generally were based on the consultation paper attached as Appendix E.

#### Feedback from the Consultation

- 4.46 The response to the consultation process is contained in appendices as follows:
- Appendix F – an analysis of the responses received
  - Appendix G – notes of the consultation meetings
  - Appendix H – the responses received from formal organisations/groups.
- 4.47 The governing bodies of both schools and a significant majority of the other respondents to the consultation exercise supported the amalgamation of the two schools (see Appendix F).
- 4.48 Both governing bodies indicated (see Appendix H) that they are agreed on a preferred way of bringing the two schools together. This is by closing the Infant School and extending the age range of the Junior School to 3-11. In a subsequent letter confirming their support for amalgamation the heads and Chairs of Governors indicated a wish for this to occur on 1 September 2008.

## **5.0 OPTIONS**

- 5.1 Members could decide to approve the formal proposals covered in the report or to reject them.
- 5.2 Members could decide to support the amalgamation of the Brampton Infant and Junior Schools in line with the outcome of the consultations. Alternatively, Cabinet could retain the status quo.

## 6.0 CONCLUSION

- 6.1 Given the backing locally for the outcomes in terms of specific school organisation change which would result from the implementation of the recommendations, Members will no doubt want to seriously consider giving them their support.

**Jim Mitchell**

**Manager/Coordinator, School Organisation Project**

*June 2007*

## APPENDICES

***Appendix A – ‘School Organisation : A Strategic Approach – Potential Infant/Junior Schools Amalgamations’ (Cabinet report for 3 April 2007 meeting).***

***Appendix B – The Belle Vue formal proposals***

***Appendix C – Statutory Guidance – Factors to be considered by decision-makers***

***Appendix D – The Beaconside formal proposals***

***Appendix E – ‘Planning primary education for Brampton – A consultation document’***

***Appendix F – Planning primary education for Brampton – Analysis of the responses to the consultation***

***Appendix G – Notes of the meetings with the Brampton Junior School Council, the schools’ staff, the governing bodies, parents and the wider community***

***Appendix H – Brampton - Responses to the consultation from organisations/groups***

## IMPLICATIONS

Staffing: There are real/potential implications for staff working in a school which is the subject of school organisation change. The position of staff in the potential changes is covered in the consultation documents which are included in the Cabinet paper provided as Appendix A..

Financial:  
Revenue - The potential implications concern the use of existing resources rather than absolute fluctuations in budget levels overall. Moreover, school organisation change can lead to a more effective use of resources.

Capital - There are clearly capital expenditure implications involved when implementing the kind of school organisation change covered in this report. This issue is dealt with at appropriate points in the covering paper and its appendices.

Electoral Division(s): All, but particularly Belle Vue, Brampton and Gilsland, Penrith East, Penrith North, Penrith Rural, Penrith West and Yewdale

Executive Decision  Yes

Key Decision  Yes

If a Key Decision, is the proposal published in the current Forward Plan?  Yes

Is the decision exempt from call-in on grounds of urgency?  No

If exempt from call-in, has the agreement of the Chair of the relevant Overview and Scrutiny Committee been sought or obtained?  n/a

Has this matter been considered by Overview and Scrutiny?  
If so, give details below.  No

### **PREVIOUS RELEVANT COUNCIL OR EXECUTIVE DECISIONS**

**Cabinet 7 September 2005**

**Cabinet 30 January 2007**

**Cabinet 3 April 2007**

### **CONSIDERATION BY OVERVIEW AND SCRUTINY**

*Not considered by Overview and Scrutiny.*

### **BACKGROUND PAPERS**

*No background papers.*

### **RESPONSIBLE CABINET MEMBER**

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