

AGENDA

Herefordshire Schools Forum

Date: **Monday 12 October 2009**

Time: **2.00 pm**

Place: **The Council Chamber, Brockington, 35 Hafod Road,
Hereford HR1 1SH**

Notes: Please note the **time, date** and **venue** of the meeting.

For any further information please contact:

Paul Rogers, Democratic Services Officer

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Agenda for the Meeting of the Herefordshire Schools Forum

Membership

Chairman	Mrs JS Powell	
Vice-Chairman	Mr NPJ Griffiths	
	Mr R Thomas	Primary Schools
	Mr T Edwards	Primary Schools
	Mrs C Garlick	Primary Schools
	Ms T Kneale	Primary Schools
	Rev D Hyett	Primary School
	Mrs S Woodrow	Secondary Schools
	Mr T Knapp	Secondary Schools
	Mrs S Catlow-Hawkins	Secondary Schools
	Mr J Docherty	Secondary Schools
	Mrs S Bailey	Special Schools
	Mrs E Christopher	Pupil Referral Unit
	Mrs A Robertson	Roman Catholic Church
	Mr A Leach	Church of England
	Mrs A Pritchard	Teacher Staff Representative
	Mr J Godfrey	14-19 Representative
	Mr A Shaw	14-19 Representatives
	Mrs A Jackson	Early Years
	Mrs R Lloyd	Early Years
Non Voting	Councillor JA Hyde	Observer
	Councillor PD Price	Observer
	Councillor WLS Bowen	Observer

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AGENDA

	Pages
1. APOLOGIES FOR ABSENCE To receive apologies for absence.	
2. NAMED SUBSTITUTES (IF ANY) To receive any details of Members nominated to attend the meeting in place of a Member of the Forum.	
3. DECLARATIONS OF INTEREST To receive any declarations of interest by Members in respect of items on the Agenda.	
4. MINUTES To approve and sign the Minutes of the meeting held on 29 September 2009 (<i>to follow</i>).	
5. LATE ITEMS/ANY OTHER BUSINESS To consider any issues raised as either a late item or any other business.	
6. HEREFORDSHIRE SCHOOLS TASK GROUP INTERIM REPORT - CONSULTATION PAPER To consider the Herefordshire Schools Task Group Interim report which is currently out for consultation. The Chairman has invited Lynn Wright, Independent Consultant, who was present at the Schools Forum meeting on 7 July 2009 to support any debate regarding the financial implications of: (a) The status quo. (b) Any possible models for the future provision of Herefordshire schools. The purpose of the meeting will be to agree a response to the consultation to be submitted by the Chair on behalf of the Forum	1 - 78

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HEREFORDSHIRE COUNCIL

BROCKINGTON, 35 HAFOD ROAD, HEREFORD.

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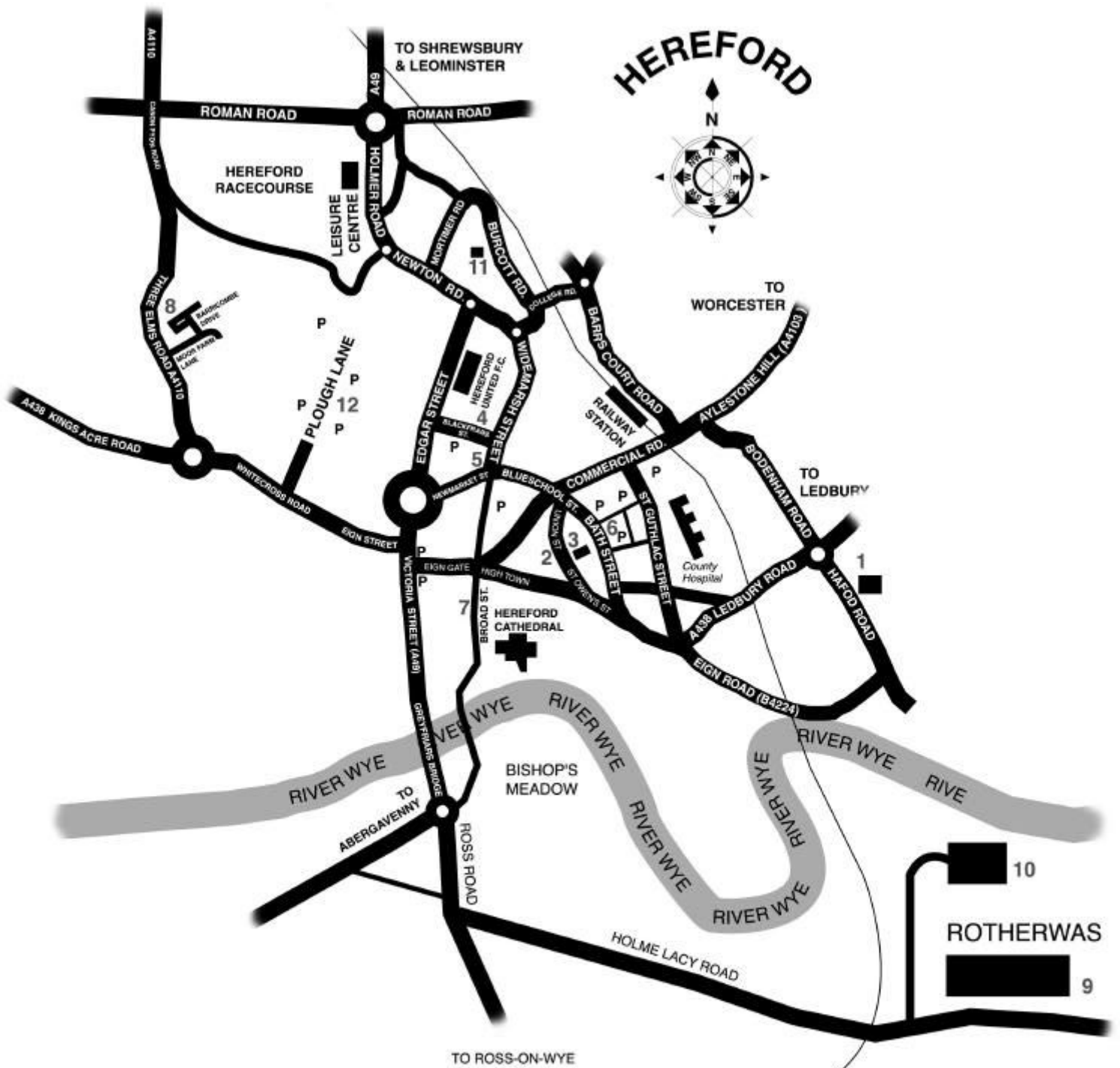
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HEREFORDSHIRE COUNCIL

MINUTES of the meeting of Herefordshire Schools Forum held at Brockington, 35 Hafod Road, Hereford. HR1 1SH on Tuesday 29 September 2009 at 2.00 pm

Present: Councillor Mrs JS Powell (Chairman)
Councillor Mr NPJ Griffiths (Vice Chairman)

Councillors: Mrs J Cecil, Mr S Pugh, Rev.D Hyett, Mr J Docherty, Mrs S Bailey, Mrs E Christopher, Mrs A Pritchard, Mr M Harrison, Mr J Godfrey and Mr A Shaw

In attendance: Councillors WLS Bowen and PD Price

20. APOLOGIES FOR ABSENCE

Apologies for absence were received from Mr T Edwards, Mrs L Gibbs, Mrs A Jackson, Mr T Knapp, Ms T Kneale, Mr A Leech and Mrs L R Lloyd.

21. NAMED SUBSTITUTES (IF ANY)

Mrs L Gibbs substituted for Mr T Edwards.
Mrs P Lloyd substituted for Ms T Kneale.

22. DECLARATIONS OF INTEREST

There were no declarations of interest.

23. MINUTES

A Member referred to Minute no.19 regarding the revised constitution and was of the view that resolution (iv) to that Minute should include the words 'subject to re-election within Herefordshire Association of Secondary Headteachers'.

The Member also referred to the debate at that meeting regarding the inclusion within the membership of the Schools Forum of business school managers for primary and secondary schools. The Chairman agreed to include an item on the Agenda for the December meeting to consider the issue.

RESOLVED: That subject to the following amendment, the Minutes of the meeting held on 7 July 2009 be approved as a correct record and signed by the Chairman:

- (i) the words 'subject to re-election within Herefordshire Association of Secondary Headteachers' be added after the word office in resolution (iv) to Minute No.19.

24. LATE ITEMS/ANY OTHER BUSINESS

CONSTITUTION

The Forum agreed to consider a late item regarding the constitution.

The Democratic Services Officer reminded the meeting that the constitution indicated that one Member must represent a school with less than 60 pupils. The Primary Schools Association (PSA) had found it difficult to nominate a Headteacher in that category and had requested that the constitution be amended to enable a nomination to be made for a school with less than 65 pupils. Also, the PSA had further requested that the constitution takes into account that one Headteacher can represent two schools.

RESOLVED: That the Schools Forum constitution be amended as follows:

- (i) **paragraph 9 be amended to enable 1 Member to represent a school with less than 65 pupils and that one Member can represent two schools providing the Member is Headteacher at both schools.**

25. BUDGET WORKING GROUP

The Finance Manager presented a report which requested the Forum to consider the recommendations from the Budget Working Group meeting held on 25 June 2009. He referred Members to the key considerations on pages 32 and 33 of the report that the Working Group had taken into account when reviewing the Schools Funding Formula. As a consequence, the recommendations of the Working Group were set out on page 31 of the report. He emphasised that the total amounts shown in the Key Points Summary which were being recommended for deletion were mainly very small sums with the exception of the £152,000 included in Dedicated Schools Grant for extended schools. The £152,000 was relatively small in comparison with the total grant funding available for extended schools in Standards Fund and Area Based Grants of £1.5 million. The Chairman asked if the £152,000 would go back into the pupil factor. The Finance Manager confirmed that it would. He informed the Forum that the Working Group would be considering the social deprivation factor at its next meeting. He reminded the Forum that within the formula was the Private Finance Initiative (PFI) factor which applied to Whitecross School. The PFI company was paid for the rent or lease of the school and the cost was shared between PFI credits, the Schools Budget and Council contribution. The Finance Manager reported that the contribution from the Schools Budget was considered by the Forum as part of the 2006/07 Budget.

A Member expressed concern that it was the Council's responsibility to pay its contribution from the Dedicated Schools Grant. The Director of Children's Services advised that it was normal practice to fund PFI payments through PFI credits and Council contribution.

The Finance Manager informed Members that he would set out the PFI costs for the next Budget Working Group meeting. He reminded the Forum that the Schools Forum had agreed the PFI budget contribution for Whitecross School in 2005 as part of the 2006/07 budget.

RESOLVED: That the Schools Forum approves the deletion of the following four factors from the funding formula for primary and high schools for 2010/11:

- (i) **Extended Schools**
- (ii) **Site Specific – Pre-fabrication buildings**
- (iii) **Site Specific – Exposed Location**

(iv) School Specific – Kitchens on Site

26. SCHOOL BALANCES

The Finance Manager presented a report on School balances at the end of the financial year 2008/09. He referred Members to pages 36 and 37 of the report which gave details of the balances. He emphasised that Herefordshire balances had fallen from 12% in 2004/05 to 6.5% currently which was slightly more than the All England average. The £30,000 balance allowance for small schools rather than 5% was the factor which gave a slightly higher balance in percentage terms than other statistical neighbours. He highlighted that revenue balances had fallen by £194,000 but that capital balances had increased by £350,000. He stressed that even though balances had decreased, there was further work needed to further reduce the balances and that the Budget Working Group would be looking at how capital balances are being used and revenue transfers to capital by schools.

The Director of Children's Services informed the Forum that that the Finance Manager had touched on an important strategic issue on Schools Funding. She suggested that the Budget Working Group should look at producing business plans for how money should be spent but that the Working group needed to be fully aware of all the issues when drafting such guidance.

RESOLVED: That the Schools Forum

- (i) notes the decrease in school revenue balances of 0.4%;**
- (ii) in particular notes the reduction in primary balances by £246,000 from 2007/08; and**
- (iii) requests the Budget Working group to consider at its November meeting a further report on schools capital balances and spending plans with more detail on subsidies and linking retained funding with capital balance transfers.**

27. DEDICATED SCHOOLS GRANT

The Finance Manager presented a report which informed the Schools Forum of the final Dedicated Schools Grant (DSG) for 2009/10, the Outturn for 2008/09 and the rates rebates for the period 2000-2009. He referred to the Key considerations set out in paragraphs 4 A, B and C in the report. He informed the Forum that the final DSG received was £33,000 more than expected and that the amount would be carried forward into next year's budget. He emphasised that the DSG was a tighter settlement than the previous year and was less than inflation. He also emphasised that the DSG headline for 2010/11 was more generous and based on a 4.5% pupil increase which was equivalent to a cash increase of 3.7%. He referred to the Minimum Funding Guarantee which had increased and that the cost and breakdown by school was set out in the table on page 42. It was estimated to rise to £20 per pupil for 2010/11 which would be another pressure to be met. He made reference to the full budget Section 52 Statement set out in Appendix 1 to the report which detailed all Children's Services spending.

A Member referred to the additional £33,000 DSG money received and asked if this should be treated as allocation. The Finance Manager agreed that the money could be allocated to schools but that as pupil numbers were not finalised by the Department for Children, Schools and Families until the end on June 2009 there would be a small

balance every year. He emphasised that although the balance could be allocated to schools this year, in future years if there was a deficit would Schools Forum want to recover this money from schools?

The Director of Children's Services advised that she would be content to allocate the money to schools. She further advised that if there were underspends at the end of the financial year and that although it was a small amount, the £33,000 would be carried forward to 2010/11 as required by DSG grant regulations.

The Chairman asked if the money could be used to cover a shortfall in this financial year. The Finance Manager advised that it was the intention to use the money for overspends on Banded Funding.

In answer to a Member's question on the Section 52 Budget Statement, the Finance Manager informed the Forum that the £879,202 budget for Pupil Referral Units shown at line 1.3.1 on page 47 had been split by Primary and Secondary pupils, although that amount currently was actually spent on secondary aged pupils in the Pupil Referral Units. He would ensure that the treatment on the Section 52 budget statement would be accurate for next year.

A Member welcomed the DSG underspend but expressed concern that the Management had not considered alternatives for the use of the DSG underspend. The Director of Children's Services advised that the suggestions in the report were provisional ideas and she had taken the view that it would be helpful for the Forum to look at these. She informed the Forum that if the underspend was allocated to schools it would be a one-off allocation. She further advised that the suggestions had been put forward for Governor support as a result of pressure from Governors. Business Plans were however needed for any suggestion.

The Assistant Director for Improvement and Inclusion referred to the DSG underspend at paragraph C on page 43 and informed Members that the £268,000 at paragraph C1 represented one additional child placement and was focussed at primary level. The Building Schools for the Future (BSF) money at C2 would enable a team to be put in place and be ready for the BSF programme.

The Assistant Director for Improvement and Inclusion made particular reference to the Governor Service Development, paragraph C5, in that a number of schools were struggling with governor support and management and the proposal outlined a business case to meet those issues. She advised that the list before the Forum was open and therefore could receive additions.

With regard to Schools ICT investment, the Director of Children's Services advised that paragraph C4 were suggestions only. She advised that ICT in schools was going to require new investment but that currently there was no new money.

A Member referred to the Virtual Learning Environment (VLE) and suggested that it was an important priority and needed to be provided. A Member took the view that money on ICT for schools was not well spent through ICT services but that it was not their fault. A Member suggested that the ICT suggestions in paragraph C4 would need to have the backing of a business case.

A Member was unaware of the anxiety from Governors with regard to Governor services. The Member asked for evidence.

The Director of Children's Services referred to discussions with Headteachers in their schools which had produced concerns about Governor Services. She advised that the majority of the money for Governor Service Development would be passported to

schools. There were some schools, however, who were not able to do this alone. She informed the Forum that every decision had an effect on other areas and transparency was paramount. She further advised that the Governor Service Development was an extension to existing management arrangements for Governors.

A Member was of the view that the Governor Service Development should be supported.

The Finance Manager informed Members of the reasons why rates rebates had been received for Aided schools and following a question from a member that because rates were funded at actual cost, the rebates belonged to all schools as a whole. This confirmed by legal opinion. A Member took the view that it would not be sensible to put money back into schools through the Rates Rebates item at paragraph D, page 45. There were, however, some schools who were struggling financially so it would be a help to schools over a few years. A member suggested that schools should have the choice of either having money in full in one year or spread over a number of years.

The Finance Manager advised that it was the intention to drip feed schools with the Rates Rebates money and to ask the Budget Working Group to develop a funding model for payment to schools.

RESOLVED: That

- (i) **Schools Forum notes the final DSG settlement and the increase of 2.6% in the Individual Schools Budget and that the under allocation of £33,000 be used to support special needs;**
- (ii) **the proposals for the use of the 2008/09 underspend (including the rates rebates) as set out in paragraph 16C be noted and ask Headteachers Forums for ideas and business plans for the next Schools Forum meeting; and**
- (iii) **the debate regarding the pump priming of Governor Service Development in the sum of £70,000 be considered as a separate item, Minute No. 28 refers.**

28. DEVELOPING CAPACITY IN HEREFORDSHIRE GOVERNOR SERVICES

The Assistant Director for Improvement and Inclusion presented a report which requested a one-off funding allocation for the development of Governor support and training resources to meet the demands of the current academic year. She informed Members that the proposals intended to build on the Governors Support team and would strengthen the position when the Service Level Agreement (SLA) was agreed.

A Member asked what the take up was on Governor training. The Assistant Director for Improvement and Inclusion informed the Forum that the training was well attended and at the last training meeting over 50 Governors attended.

A Member asked that should a person be appointed to a new post, could a person be appointed from redundancies in the system. The Assistant Director for Improvement and Inclusion advised that such an appointment would be someone who would be fit for the job.

RESOLVED: That the Schools Forum approves as a one-off payment of the funding request of £70,000 from DSG underspend 08/09 to facilitate the

improvement of Governor services as outlined in the report until the SLA is in place for April 2010.

29. WORK PROGRAMME 2009/10

The Forum considered the Work Programme for 2009/10.

RESOLVED: That the Work Programme for 2009/10 be amended as follows:

- (i) the deletion of the Section 52 Budget Statement, the Schools Library Service and Early Years Funding Formula from the December meeting;**
- (ii) items for inclusion at the December meeting will be**
 - Budget Working Group**
 - Dedicated Schools Grant Underspend Cases including feedback from the Herefordshire Schools Task Group**
 - Constitution – business school manager membership**
- (iii) items for the January meeting will be**
 - Early Years Funding Formula**
 - Schools Budgets**
 - Extended Schools**

The meeting ended at 3.55pm

CHAIRMAN

HEREFORDSHIRE SCHOOLS TASK GROUP INTERIM REPORT

FOR PUBLIC CONSULTATION

SEPTEMBER 2009

CONSULTATION DATES: 25 SEPTEMBER 2009 TO 2 NOVEMBER 2009

Children & Young People's Directorate

Dr S Menghini

Your Ref:

Our Ref: SM

Please ask for: Sharon Menghini

Direct Line / Extension: 01432 260039

Fax: 01432 340189

E-mail: smenghini@herefordshire.gov.uk

September, 2009

Dear Stakeholder,

Following agreement at a meeting with Cabinet Members, Head Teachers and Chairs of Governors in December 2008 the Schools Task Group was established to consider the way forward for the planning of Herefordshire provision of schools. Great emphasis was placed upon the need to continue to engage schools and their local communities in the debates as we move forward. It was agreed that it was important to ensure we continue to plan for and provide a high quality education system for our young people, that gave them the very best opportunities for their lives in the 21st century and build upon the excellence and good practice that we already have in our county. It was also acknowledged that the pressures of falling rolls and financial constraints meant that the status quo was not an option but at the same time that there is great variety and diversity across the county which would need to be taken into account in any future plans.

Bearing all of this in mind, it is a complex and sensitive task that we all face. The Schools' Task Group, made up of School Head Teachers, Governor representatives, local officers and chaired by David Brown an independent chair has met on several occasions. This paper is the result of their deliberations. Heads and Chairs have already had early sight of the paper prior to this formal consultation and broadly speaking, it has been well received. An easy to read version is being prepared and will be published shortly.

We are now consulting on this paper with schools, stakeholders and the public before the Cabinet Meeting in November which will outline the messages from the consultation and inform future planning.

We hope that you will take the time to read and debate the content with colleagues and have encouraged schools to engage with their local parents and communities as much as possible to ensure that the broadest discussions can take place and everyone has an opportunity to take part.

Working in partnership for the people of Herefordshire

Brockington, 35 Hafod Road, Hereford, HR1 1SH

Herefordshire Council

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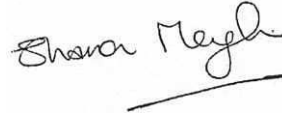
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Please send in your response sheet either as individuals or groups as explained later in the document. We look forward to receiving your replies.

Yours sincerely,



**COUNCILLOR PHILIP PRICE
CABINET MEMBER, ICT, EDUCATION
& ACHIEVEMENT**



**SHARON MENGhini
DIRECTOR OF CHILDREN'S
SERVICES**

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Responses to the consultation can be submitted through:

- the web consultation link www.herefordshire.gov.uk/consult
- via email to schoolstaskgroup@herefordshire.gov.uk
- via post to: F.Lennon Children & Young People’s Directorate, PO BOX 185, Blackfriars Street, Hereford. HR4 9ZR

INTRODUCTION

CONTEXT

Herefordshire is a County of good educational standards with aspirations for excellence. Herefordshire Schools Task Group (HSTG) believes that we need to seize the strengths of this as well as ensuring that all children and young people have the appropriate level of educational opportunities to meet their needs and aspirations. Their needs are paramount in any consideration of strategic delivery over the next ten years and should be seen in the widest sense possible.

Solutions to the challenges which face Herefordshire are most likely to come from local leaders, in consultation with Governors, Headteachers and local communities who will be supported by the Local Authority. The HSTG acknowledges the background and history relating to this process of change. A climate of negativity and apprehension will not support the long term interests of our children and young people. Only by encouraging debate about change at all levels within the context of diverse provision will sustainability be achieved.

Building upon the 21st Century principles document (see additional information section) which had previously been agreed with head teachers, this task group has been established. It must be emphasised that the task group is advisory to the Council and any decision on school provision will be taken by the Council Cabinet.

HSTG has considered that the challenges facing Herefordshire are:

- The priority to continually improve the quality of educational outcomes
- The impacts of falling rolls, surplus capacity and parental preference
- Financial realities
- Changes in school workforce

PURPOSE OF TASK GROUP

- P1** To establish a set of criteria to underpin the future of education and learning provision which can then be applied to establish a strategic development plan for the next ten years. These criteria will provide a framework upon which decisions will be made.

This is exemplified in the report as:

Principles, criteria and both short and medium term recommendations.

- P2** To agree a set of principles which can then be applied for the drawing up of a draft model of schools' provision prior to full consultation. It may be that more than one model can be designed for consultation.

This is exemplified in the report as:

Protocols for working with schools "with challenges", and potential models of school leadership.

- P3** To look at the different dynamics of Herefordshire – market town, rural areas, city etc and to have flexibility to consider any other issues as they arise.

This is exemplified in the report as:

Strategic information about each cluster in the context of Herefordshire's demographic changes and improved financial modelling and analysis.

Following consideration of the fundamental issues about educational provision, we propose a way forward. We anticipate and welcome more detailed discussion coupled with wide consultation that will lead to timely action.

HSTG suggests that the existing Local Authority protocols for supporting and challenging schools are applied by all Leadership Teams. This is to ensure consistency, clarity and openness when considering the future of all schools. This will be subject to the usual Cabinet approvals where needed. This procedure then becomes a comprehensive approach for supporting Governors, with advice from Headteachers, SIPS and other relevant Stakeholders.

The principles outlined above indicate that Governors, Headteachers, the Local Authority, stakeholders and communities need to consider different approaches to school governance, leadership and organisation. Appendix 1 – Models of Leadership in 21st Century considers some of the national, regional and local approaches already under consideration and offers models to promote discussion.

The Diocese, communities and clusters of schools with the Local Authority will play an important role in determining the shape of school leadership models in Herefordshire in the 21st Century. To be able to fully engage in this process requires accessibility to the accurate data relating to school rolls, finance, and demographic factors. None of these pre-determine any future approach.

1. CONSIDERATIONS REGARDING CLUSTER WORKING

Standards of education are paramount and any strategic review should celebrate and build upon the success of Herefordshire's existing educational provision. The identified challenges must be considered by all partners when designing models of working which ensure high quality and sustainable education in its broadest sense for Herefordshire's children and young people. Therefore the status quo is not sustainable.

Cluster Working Recommendation 1 – CWR1

Engagement of all stakeholders is essential. Local communities and appropriate authorities must contribute to and take ownership of the outcomes of the process. The process should be open and inclusive where all those who seek to participate respect the views of others and treat those views with due regard to the differing faith, cultural and professional perspectives.

Cluster Working Recommendation 2 – CWR2

Co-operation is essential to meet the identified challenges. It is also a necessary part of retaining a widespread and diverse variety of education as currently chosen by parents. It is fundamental to the continued improvement of children and young people and a vital part of schools sharing leadership, teaching and wider support services. Co-operation can take a variety of forms including sharing physical facilities, staffing and resources. Governors, Headteachers and appropriate authorities will work together through their cluster schools, to establish a firmer foundation for this. All schools must be pro-actively engaged in such discussions.

Cluster Working Recommendation 3 – CWR3

Provision planning is to be adopted and applied by all schools as part of annual self evaluation. Local Authority, Diocesan and Trust Representative officers alongside SIPs should support all Governing Bodies to undertake, by September 2010, a formal evaluation of different options to feed into the creation of a strategic plan for Herefordshire. This will inform a strategic map for Herefordshire. (Appendix 2 Governors Strategic Planning Process)

Cluster Working Recommendation 4 – CWR4

Cluster Meetings of Governors, Headteachers and Local Authority and Diocesan/Trust representatives will take place termly, with agenda and minutes of the meetings to be made available on Herefordshire Council Website. Accurate information relating to financial and pupil data and evaluation of standards relating to all schools and other members of the clusters will be made available to aid discussion and strategic planning.

- There may also be occasions where cross cluster solutions are appropriate (e.g. 14-19 networks);
- Such solutions will inform the strategic planning for Herefordshire provision;

- The Local Authority and Diocesan/Trust Board where relevant, with Schools Forum will apply a test of financial viability/sustainability to cluster/federation proposals. This follows discussions held at a meeting of Schools Forum in July 2009 where the financial factors were presented.

(Appendix 3 – Clusters and Feeder Primary Schools + Appendix 4 – Cluster Meeting Draft Agenda and Key Performance Indicators)

Cluster Working Recommendation 5 – CWR5

Schools facing challenges have specific issues relating to their development and sustainability. Governing bodies have the responsibility to provide strategic direction for their schools in order to maximise the opportunities on offer for their children and young people and ensure continuous improvement of standards and delivery. As part of this duty governors should be required by the Local Authority, and Diocesan Boards if appropriate, to consider all options should such challenges face their school.

Existing Local Authority protocols for supporting and challenging schools facing issues such as finance, falling rolls, changes in leadership, standards and inspections will be integrated into the proposed approach for Governing Bodies and school leadership teams to consider when provision planning. This will underpin the HSTG principles and support the development of high quality sustainable schools.

Cluster representatives and school leadership teams should be fully involved in such developments and offer solutions and models for consideration.

This will further support the consideration and development of new models of working.

Where agreements, models and/or solutions cannot be identified through this approach Local Authority officers will further support and challenge in order to bring about an agreed plan of action. If necessary the Local Authority will use its powers to intervene if no cluster engagement has been undertaken prior to appointing to leadership vacancies or developing solutions to school specific issues.

Please complete your responses to section 1 recommendations CWR1- CWR5 on the template provided at the end of this document.

2. CONSIDERATIONS REGARDING SCHOOL LEADERSHIP

Leadership changes are a normal part of school life. An essential element of education provision in the next 10 years will be developing, recruiting and retaining the best possible school leaders in Herefordshire. The purpose of this is to ensure that standards and the quality of provision continue to improve and that our schools are effectively led into the 21st Century.

Developing different models of school leadership is one way of recruiting and retaining high quality school leaders and will be considered at every opportunity. All partners will see this as an essential element of delivering improved standards of education in Herefordshire.

Models of School Leadership could include the appointment of “executive heads” for groups of schools or other less formal ways of ensuring that high quality leadership can be sustained. It will be at school and local level that more innovative and creative solutions may be found. Community, diversity, faith and rural/urban contexts will impact upon how models are developed but all schools, their Headteachers and Governors, should be active participants within their clusters in finding new models of working. New models of Governance will also emerge within any new model of leadership. (Appendix 1 – Models of School Leadership in 21st Century)

Formal amalgamations will be promoted and encouraged where Governors of relevant institutions are supportive. This will be in line with strategic planning from the Governors, cluster schools, Headteachers and appropriate authorities.

Models of Federation will be supported where the Local Authority and Diocesan Boards of Education and Governors recommend this approach.

The National College for School Leadership publishes a range of information on School Leadership the most recent being School Leadership Today – September 2009 which can be found at www.nationalcollege.org.uk

This most recent article provides an informed perspective on models of leadership within schools for the future. Such publications should be referenced when considering the design of any future provision.

Leadership Recommendation 1 – LR1

Change of leadership will require a review of different potential leadership options/models with Governors, cluster schools, Headteachers and appropriate authorities. This will include different models of governance as well as design of staffing structures.

Leadership Recommendation 2 – LR2

Succession planning will follow the evaluation of a school’s future sustainability by Governors, Headteacher, cluster schools, and appropriate authorities.

Leadership Recommendation 3 – LR3

Changes to the leadership of a school will be discussed in Cluster Meetings prior to any recruitment process taking place. Recognising that solutions may not be limited to the host cluster all Headteacher vacancies will also be shared with all Heads prior to recruitment so that every opportunity for alternative models are explored.

Leadership Recommendation 4 – LR4

Resource and capital implications will be considered and prioritised throughout the planning process with Local Authority officer support.

Please complete your responses to section 2 recommendations LR1-LR4 on the template provided at the end of this document.

3. CONSIDERATIONS REGARDING SUSTAINABLE SCHOOLS

Local schools can have a direct impact upon community sustainability and Herefordshire supports all schools being active participants in their local community and the wider community they may serve, through faith, specialist provision, federations and external work. The synergy of needs with rural communities is to be praised and supported.

Parental preference is a central factor in school place planning nationally and in Herefordshire. Parental preference is one of the key drivers of change. It can create pressure on school places and also leave surplus places elsewhere, leading to changes in school provision.

HSTG differentiates between 'small schools by design' and those schools with surplus capacity and/or falling rolls. This will enable a more strategic consideration of school provision in Herefordshire.

Small schools 'by design' are those representing a specific and distinct model of education. This might relate to very isolated communities where cost of transport would be high even within an overall transport review. Such schools will be a continuing part of the pattern of education provision.

Small Schools which are sustainable 'by design' will have taken action to mitigate against:

- Lack of resources to ensure full safeguarding measures are effective;
- Potentially restricted curriculum/ extra-curricular opportunities which impact upon standards;
- Limited opportunities for social development.

Such schools will have explored different models of leadership, cluster provision and which models are financially sustainable.

Cluster Meetings will consider schools' sustainability as part of their regular meetings.

Key performance indicators will be used to consider sustainability and forward planning.

Recommendations 3.1 and 3.2 require you to indicate your preference for the threshold at which discussion and monitoring would take place involving cluster schools, Headteachers and appropriate authorities.

Sustainable School Recommendation 3.1

Surplus Capacity:

- a) 25% (currently 20 Primary Schools, 0 High Schools)
- b) 30% (currently 16 Primary Schools, 1 High School)
- c) 35% (currently 8 Primary Schools, 1 High School)

Sustainable School Recommendation 3.2

Falling Rolls:

- a) 50% fall in admissions over a 2 year period
- b) 20% reduction in pupil numbers on roll over a two year period
- c) Both A and B

Recommendations 3.3 and 3.4 detail the current threshold levels in use when considering total pupil numbers as an indicator of sustainability. You are asked to consider if these are set at the right levels.

Sustainable School Recommendation 3.3

Primary Pupil Numbers:

- a) 36 or less (Small Schools Policy threshold)
- b) 37 – 45 (Monitoring threshold)
- c) 45 – 60 (Financial viability and sustainability)

Sustainable School Recommendation 3.4

Secondary Pupil Numbers:

- a) 200 or less (Small Schools Policy)
- b) 201 – 350 (Monitoring threshold)

Schools facing challenges of performance, budget deficit, recruitment or a combination of factors will be required to take appropriate action as detailed in the Schools Facing Challenges protocol. Such schools will be considered at the regular Cluster Meetings.

Please complete your responses to section 3 recommendations 3.1-3.4 on the template provided at the end of this document.

4. CONSIDERATIONS REGARDING FINANCE

Financial realities should not uniquely determine educational provision which is about standards, safeguarding and wider aspirations. However, Herefordshire is the third lowest funded local authority and has to work within the nationally set funding of schools model. All stakeholders will support the leadership of the Council in its continuing efforts to achieve a fairer resource allocation for Herefordshire.

All detailed financial considerations and modelling should be considered in detail at the Schools Forum as this is the usual framework for accountability.

Schools Forum holds responsibility for considering possible funding formula and other financial modelling which affects our schools. A paper was considered at Schools Forum in July 2009 which details the implications of falling rolls in Herefordshire (see Additional Information)

Coherent capital planning is essential in order that every school organisation plan encompasses all capital planning and works.

Finance Recommendation 1 – F1

Clusters should consider pooling Devolved Formula Capital monies to create centres of excellence in specialist areas with guaranteed access for all.

Finance Recommendation 2 – F2

New builds of large Primaries and all High Schools should incorporate centres of excellence with guaranteed access to specialist facilities, as should all schools where these possibilities exist.

Finance Recommendation 3 – F3

All strategic capital developments such as Building Schools for the Future and Primary Capital planning should be coherent and align with any other developments, unless there is a risk to accessing the capital grant due to any external timescales.

Finance Recommendation 4 – F4

Any new build needs to be consistent with surplus places planning.

Finance Recommendation 5 – F5

Any new build should take account of the higher pupil density and closer proximity of schools in central areas of Herefordshire thus realising opportunities for different approaches.

Please complete your responses to section 4 recommendations F1-F5 on the template provided at the end of this document.

5. CONSIDERATIONS REGARDING NATIONAL STRATEGIES

National Strategies and Central Government Initiatives

The development and implementation of central government strategy will impact upon the design and delivery of provision within the county and should be taken into account when planning for long-term sustainable developments. The outcomes from such activities aim to improve achievement, attainment and access for all children and young people throughout their educational careers.

Current key strategies include:

- Early Years Foundation Stage
- Increase in participation
- 14 -19
- Machinery of Government / Learning and Skills Council
- Connexions
- Narrowing the Gap

11-19 Strategies will bring significant changes. The planning for this new commissioning role for the Local Authority needs to be aligned with school provision planning more generally. Schools, colleges and work-based learning providers will form a network of provision delivering traditional learning opportunities enhanced by diplomas and apprenticeships for young people up to the age of 19. When high schools are therefore planning provision developments such plans will need to fit within this strategy and context. Any capital planning will also need to be agreed and defined within this in order to provide a cohesive network of provision.

When Clusters are considering provision planning they need to consider the national and local context.

Please provide your comments on section 5 on the template provided at the end of this document.

6. TIMELINE

Strategic planning of places must operate within the context established in this document,, and also take into account the long term planning intentions within Herefordshire, including proposals for new housing developments. New housing does not always yield high pupil numbers and will not address the decline in pupil numbers across Herefordshire. Large scale housing developments will be located primarily within Hereford City and, to different degrees, in the market towns. A strategic plan of provision should be developed that allows for flexibility at a local level whilst also addressing some of the fundamental issues facing Herefordshire as stated in this paper, and any associated issues such as catchment areas. A strategic approach is required to establish sustainable provision.

Key milestones are set out below.

DATE	ACTIVITY
January 2009	Herefordshire Schools Task Group Established (HSTG)
January – July 2009	Monthly meetings of HSTG
June 2009	Pre-consultation draft document issued to Head Teachers and Chairs of Governors
July 2009	Data and finance presentation to Schools Forum
September 2009	HSTG considers feedback from Head Teachers and Chairs of Governors / consultation paper finalised / presented to Cabinet
25.09.09 – 2.11.09	Formal consultation period
4 November 2009	HSTG meet to consider key messages from consultation responses
26 November 2009	Final consultation report presented to Cabinet
January 2010 onwards	Professional groups to consider Cabinet decision and implementation
	Other relevant activities
December 2009	Pupil Admissions consultation
April 2010	Connexions and Learning and Skills Council formally transfer to Local Authority
August 2011	Strategic Housing Consultation
September 2011	Building Schools for the Future Strategy for Change Consultation

7. MATRIX MAPPING

The HSTG was tasked to address three key purposes as defined at the beginning of this consultation document. This matrix identifies which recommendation relates to which key purpose. Purpose 1, 2 and 3 have been plotted against the recommendations made by the HSTG to demonstrate this.

	CRW 1	CRW 2	CRW 3	CRW 4	CRW 5	LR1	LR2	LR3	LR4	SS1	SS2	SS3	SS4	F1	F2	F3	F4
PURPOSE 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PURPOSE 2		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PURPOSE 3		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

APPENDIX 1 – MODELS OF LEADERSHIP IN 21ST CENTURY

There is significant change occurring in styles of school leadership and governance nationally. Academies, Trusts and Federations are just some examples of different approaches to school organisation alongside an already diverse education sector. The roles of school leaders and Governors are also changing in parallel with succession planning being a major driver for change. Technology will also be a critical change agent giving new opportunities for different ways of organising learning.

The HSTG believes that this is an important part of the future of education in Herefordshire and forthcoming national developments will further increase this change process. The Government's 21st Century Schools White Paper was published late in the cycle of the HSTG meetings and therefore has not been fully considered by the group. However, any future planning of our school provision will need to take account of this.

It is clear that both main political parties are committed to maintain the pace of change with support for commissioning new schools, dealing robustly with low standards and supporting school led change and autonomy. It is therefore the view of the HSTG that different forms of school organisation need to be increasingly part of the overall pattern of schooling in Herefordshire.

Herefordshire already has some examples of innovative, locally led creative solutions to the some of the leadership challenges facing all schools and those in specific to our county.

Example 1: Golden Valley Cluster

The network of schools within this cluster support each other in a variety of ways including shared resources, shared experienced staff, access to Information Communication Technology (ICT) curriculum support and planned training events. Fairfield High School, Peterchurch Primary School, Clifford Primary School, Longtown Primary School and Michaelchurch Escley Primary School have worked very closely together for over 25 years and received national recognition for this practice.

Example activities:

- A school nurse has an office in the high school and works with all primaries. The school nurse has curricular in-put at all schools;
- A shared mini-bus is used as a pyramid resource;
- Joint employment of a Special Educational Needs Coordinator and music teacher;
- Staff work across schools;
- Music tuition for primary pupils takes place in the high school;
- Clubs for primary pupils are co-located in either primary schools or at the secondary school;
- Secondary pupils work as Sports Leaders in the primary schools;
- Resources and facilities are commonly loaned amongst the schools; data logging, pottery firing, science equipment, animal viewing etc;

- Joint planning at Key Stage 1 and 2;
- Joint bid writing;
- Monthly Headteachers meetings;
- Joint responses to Local Authority and Central Government issues;
- Joint policy writing when appropriate;
- Secondary Child Care BTEC pupils work in primary settings;
- Joint training;
- Joint events either external or internal to the schools;
- Curriculum innovations; Food into Schools 5-14, Modern Foreign Languages (MFL) developments, Maths Learning Network;
- IT equipment purchased through Secondary School;
- Pooling small grants for effective use;
- Joint extended schools activities;
- Experience of altering numbers of pupils and use of variable contracts for teaching staff;
- Comprehensive transition programme; pre-school to primary / primary to secondary / secondary to tertiary.

Future Developments:

- Attendance at meetings of one head thus reducing “cover” costs;
- Joint site manager;
- Joint bursar;
- Joint grounds maintenance;
- Admin tasks such as CRB checking;
- Joint Governors committee.

“Future Vision” – now becoming a reality:

Fairfield High School has developed an interesting Virtual Learning Environment (VLE) through its web-site. All pupils, who have the technology, can access all lessons from home. The school has a bid being considered to allow those without the technology the ability to borrow it from the school. There are plans to set up IT cafes in the primary schools for secondary pupils to use. A pilot is underway exploring primary use of the Fairfield VLE at Michaelchurch Primary. This will create viable capacity in terms of servers and hardware for a small school. This facility will be offered to the other primary schools. The aim is to establish a “Virtual Hard Federation” through the Fairfield Website from early 2009. This would create a virtual learning community located in five different and independent sites enabling:

- Full VLE access for all pupils, parents and staff of the Pyramid;
- IT support for primaries from secondary;
- Joint leasing arrangements;
- Hardware replacement service from the secondary school, which would hold stock;
- Identical hardware in all schools;
- Most technical support required in secondary to service primaries;
- Joint software licenses – this might require a more legal definition of a virtual federation;
- Video conferencing for groups of pupils particularly those taught in mixed age classes;
- Joint projects at times taught by secondary staff;
- On line clubs;
- Mentoring between secondary and primary pupils to ease transition;
- Video “conferenced” lessons from High School i.e. Spanish;
- Gifted and Talented programmes;
- Maintenance of primary web-sites and updating such sites.

Example 2: Kingstone Partnership

Shaping the Future:

The cluster has worked together over the past two years to develop a shared vision for their partnership of schools.

This has involved:

- Sharing good practice across the partnership (e.g. introduction of values education at secondary level);
- Partnership Heads engaging in regular, strategic planning meetings;
- Creation of a new role within the senior leadership across the partnership, the Innovative Learning Development Leader, to coordinate innovation and collaboration;
- The development of shared staffing, particularly through timetabling ‘outreach’ time for secondary Expressive Arts, P.E. and MFL teachers to work in partnership primaries. They have begun to explore shared administrative staff.

Leading Learning and Teaching:

They have developed a programme of collaborative professional development events (including toolkits, INSET, twilight sessions, staff meetings) to address identified CPD needs across the partnership. They have together successfully accessed funding for these events and have provided a programme which demonstrates ‘value for money’ across the

partnership, e.g. Voices in-schools programme for Music; P4C; Assessing Pupil Progress (APP) in Literacy; Creative Science.

They have ensured smooth transition from primary to secondary through:

- Greater continuity of curriculum, pastoral care and approaches to teaching and learning through a shared focus on personal, learning and thinking skills;
- Development of a comprehensive programme of transition activities which begins in Year 4.

Developing self and working with others:

They have taken steps to build effective teams within a collaborative learning community, e.g.

- The partnership learning mentors meet together regularly and plan activities and approaches together;
- They have provided funding for cross phase observations and meetings.

Managing projects:

- They have collaborated on a number of cross-school, cross phase projects:
- International Year of Astronomy 2009 science peer education programme
- Year of Food and farming film making project

Securing accountability:

They monitor and evaluate the effects of actions within the partnership and use these to inform next steps.

Strengthening community:

They work collaboratively with partner professionals both within and outside the partnership and have forged links with the local farming community, The Bulmer Foundation, The Hereford Diocese and many others.

Example 3: Wigmore School

Wigmore Primary and High Schools have one head-teacher leading both settings and leadership and governance arrangements across both. The campus location has supported this and staff have gained knowledge and expertise from each other. They are subject to two inspection regimes.

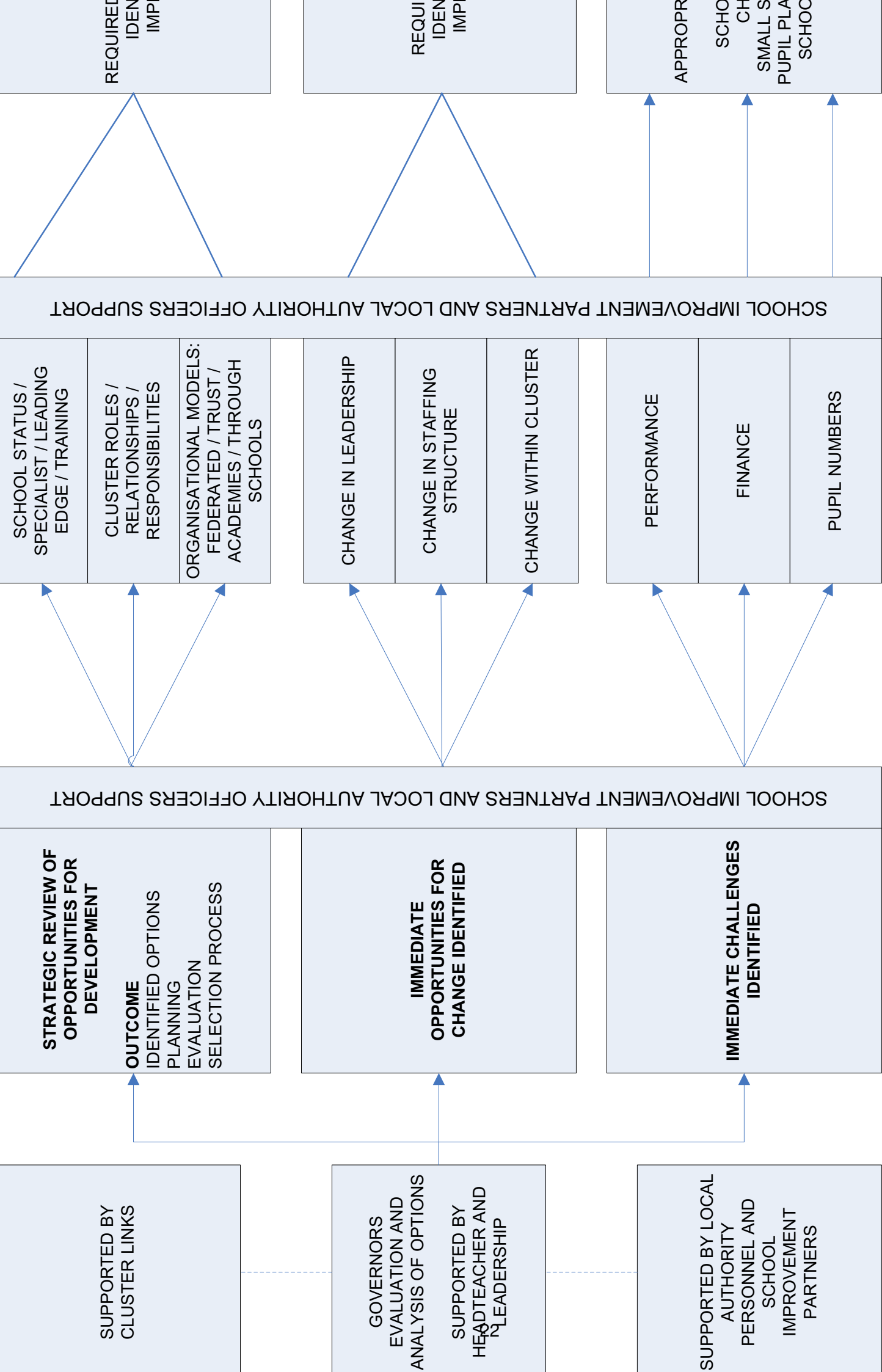
Wigmore cluster, in conjunction with NCSL and the Local Authority, is also piloting a Schools Business Manager post which works across all settings and supports the business engine of the schools.

Example 4: Bromyard Cluster

The Bromyard cluster is considering adopting Co-operative Trust Status involving at least 4 of the 7 schools within the cluster membership. Discussions are underway with the DCSF to this effect.

The Bromyard cluster is also piloting a Schools Business Manager project in collaboration with the NCSL and the Local Authority.

The HSTG wants to build upon such approaches in combination with a strategic overview so that models are affordable, meet the needs of all and reflect the feedback from this consultation.



APPENDIX 3 – CLUSTERS AND FEEDER PRIMARY SCHOOLS

SCHOOL CLUSTERS			
<p>Aylestone Cluster Aylestone High School Broadlands Primary Marden Primary St James' CE Primary St Thomas Cantilupe CE Primary Sutton Primary Wellington Primary Withington Primary</p>	<p>Bishop's Cluster Bishops of Herefords' Bluecoat St Mary's CE Primary, Fownhope Hampton Dene Primary Lugwardine Primary Mordiford CE Primary St Paul's CE Primary</p>	<p>Bromyard Cluster Queen Elizabeth Humanities College Bredenbury Primary Brockhampton Primary Burley Gate CE Primary Pencombe CE Primary St Peter's CE Primary, Bromyard Whitbourne CE Primary</p>	<p>South Wye Cluster The Hereford Academy Holme lacy Primary Riverside Primary Little Dewchurch CE Primary Marbrook Primary St Martins Primary</p>
<p>Kington Cluster Lady Hawkins High School Almeley Primary Eardisley CE Primary Kington Primary Pembroke CE Primary</p>	<p>Kingstone Partnership Kingstone High School Clehonger CE Primary Eways Harold Primary Garway Primary Kingstone & Thrupton Primary Madley Primary Much Birch CE Primary</p>	<p>Ledbury Cluster John Masfield High School Ashperton Primary Bosbury CE Primary Colwall CE Primary Cradley CE Primary Eastnor Parochial Primary Ledbury Primary Much Marcle CE Primary</p>	<p>Leominster Cluster The Minster College St Michael's CE Primary, Bodenham Ivington CE Primary St James's CE Primary, Kimbolton Leominster Infants Leominster Junior Luston Primary Stoke Prior Primary</p>
<p>Golden Valley Cluster Fairfield High School Clifford Primary Longtown Primary Michaelchurch Escley Primary Peterchurch Primary</p>	<p>St Mary's Cluster St Mary's RC High School Our Lady's RC Primary St Francis Xaviers RC Primary St Joseph's RC Primary</p>	<p>Ross West Cluster The John Kyrle High School Ashfield Park Primary Goodrich CE Primary Kings Caple Primary Llangrove CE Primary St Weonards Primary Whitchurch CE Primary</p>	<p>Ross East Cluster The John Kyrle High School Brampton Abbotts CE Primary Bridstow CE Primary Gorsley Goffs Endowed Primary Lea CE Primary Weston Under Penyard</p>

<p>Weobley Cluster Weobley High School Canon Pyon CE Primary St Mary's CE Primary, Credenhill Dilwyn CE Primary Staunton on Wye Endowed Primary Weobley Primary</p>	<p>Whitecross Cluster Whitecross High School Burghill Primary Holmer CE Primary Lord Scudamore Primary Stretton Sugwas CE Primary Trinity Primary</p>	<p>Wigmore Cluster Wigmore High School Kingsland CE Primary Leintwardine Endowed Primary Orleton CE Primary Shobdon Primary Wigmore Primary</p>	
<p>Special Schools Cluster Barrs Court School, Hereford Blackmarston, The Brookfield School Westfield School Leominster</p>	<p>PRU Cluster St David's, Hereford The Aconbury Centre, Hereford The Priory, Leominster</p>		

APPENDIX 4 - CLUSTER MEETING DRAFT AGENDA AND KEY PERFORMANCE INDICATORS

Clusters should all have regular, termly, minuted meetings of Governors, Headteachers and Local Authority and Diocesan representatives as required. These meetings should have access to financial and pupil data and evaluation of standards relating to all schools and other members of the clusters to promote discussion and strategic planning. (Appendix 1 - Models of Leadership in 21st Century). This will draw upon the reviews for all schools and the sustainability issues around financial and school role data.

The agenda should include discussion of schools facing significant challenges as well as those facing a change in leadership. Succession planning should feature additionally as a regular standing item. Reviews of different options should be considered with wider dissemination of this discussion whatever the outcomes, alongside considering strategic changes to groups of schools. It is clearly up to Cluster schools to decide how best to organise the precise details but local authority and Diocesan officers will offer support and facilitate cross-cluster work where needed.

The HSTG has also considered a range of factors which may affect a large number of schools and although none of these on its own impacts upon the future of the school and many are relative, together they can have a negative impact upon children and staff. Overall we need to find ways of working to support change to deal with them. Therefore the cluster of schools should consider, with Local Authority and Diocesan officers, approaches for the following criterion to support schools:

Sustainability Criteria

- Headteachers receiving very little non-teaching time compared to previously;
- Senior managers in the school do not receive appropriate non-contact time;
- Budgets for Continuing Professional Development (CPD) are being cut - including supply cover;
- School has had to make redundancies, either in teaching or support roles;
- Decisions being made to balance the budget rather than to enhance learning;
- School development plan indicates that staff at the school will be unable to continue to fulfil the school improvement agenda for the next three to five years, given the developing conditions in the school;
- Changes affecting the day to day experience of pupils/ staff in the school;
- Anxieties regarding numbers on roll – characteristically the drift downwards prompting questions from parents about viability and increasing pressures in the budget;
- Day to day management (in practical terms) becoming more difficult because there is no flexibility of staffing and a very small number of staff find themselves frequently called upon to undertake tasks for which they are inadequately prepared or trained;
- Vision and strategic management are replaced by the struggle to survive.

APPENDIX 5 – HEREFORDSHIRE STRATEGIC HOUSING PLANNING APPROACH

The relationship between the strategic planning of housing and that of educational provision is both important and mutually dependent. The HSTG considered the current approach in Herefordshire to housing as part of its work. The Children and Young People's Directorate staff also met with Council colleagues responsible for planning to agree a joint approach to consider future housing proposals and the inter-relationship with any developments regarding schools.

The HSTG received a paper outlining key housing issues from the Council's Planning Policy Manager and the information has now been updated as set out below.

Herefordshire's current planning policies are set out in the Unitary Development Plan (UDP) which runs up to 2011. The UDP is due to be replaced by the Local Development Framework, part of which, the Core Strategy, is expected to look forward to 2026. The Core Strategy, in turn, must comply with the regional plan in the form of the West Midlands Regional Spatial Strategy (RSS).

The Regional Spatial Strategy is currently being considered by the Secretary of State but at this stage it is already known that it is intended to allocate at least 16,600 new houses to be built in Herefordshire between 2006 and 2026. Furthermore, half of those, 8,300, are expected to be provided in and around Hereford itself.

These housing figures may sound ambitious and, in the case of Hereford, they are. A further 8,300 houses for Hereford represents increasing the size of the City by around 30%. However, in the Market Towns and Rural Areas a different picture is emerging – 8,300 new houses in this case represents a slower housing growth than has been experienced in recent years.

The Local Development Framework will need to deal with much more than just housing, but in essence, much of the infrastructure needed for the County between now and 2026 will be directed by the needs of new housing including roads, utilities, employment and retail development and social "infrastructure" such as schools and health facilities. Other policy areas will include preserving the County's natural and historic heritage, climate change issues, minerals and waste and a variety of other planning issues.

Another critical housing feature is the provision of Affordable Housing – Herefordshire has a particularly wide "affordability gap" for private housing.

The typical “pupil yield” for Herefordshire was recorded in the 2001 census as follows:

Size of dwelling	2+ bed	2/3 bed	4+ bed
Pupil yield per school	Flat/apartment	house/bungalow	house/bungalow
Pre-school	0.011	0.023	0.034
Primary school	0.093	0.163	0.267
Secondary	0.059	0.111	0.228
Post 16	0.005	0.005	0.005
Youth	0.026	0.035	0.069

So, for example, a development of 100 three-bedroom houses typically generates 16 primary school age children. Few, if any, villages will have access to that amount of growth in the period 2006 to 2026.

The Core Strategy is being produced in close co-operation with the Herefordshire Partnership to ensure that it truly reflects the Council’s wider objectives as the “Spatial” element of the Sustainable Community Strategy.

The Council has been keen to engage with the public and other stakeholders to take the necessary planning policies forward and has carried out two major consultation exercises in 2007 and 2008. The next stage will be setting out our “Placeshaping Options” for the development of the County – this consultation is expected to take place in January, February and March 2010. Once the consultation responses have been analysed, later in 2010, the Council will then need to submit its draft Core Strategy to the Secretary of State for a public examination, probably towards the end of 2010, with the final adopted version due for publication in 2011.

Full details of the Local Development Framework can be found on the Council’s website:

www.herefordshire.gov.uk/ldf

APPENDIX 6 – STRATEGIC PLANNING INFORMATION

The HSTG considered a wide range of data, information and analysis over the course of its work. The Group acknowledged that the data was often produced at specific points in time. The data is dynamic in the sense that it changes at frequent intervals. However, the underlying trends were worth considering and the changes in data were not fundamental in terms of altering the overall picture.

The range of data included the following and much of it was presented by school cluster:

- Pupil numbers by school, current and projected and a range of associated trend information;
- Locations of pupils in relation to the school they go to, and to clusters of schools, presented in map format;
- School capacity;
- Financial information relating to projected numbers.

ADDITIONAL INFORMATION

PRINCIPLES TO GUIDE THE PROVISION OF EDUCATION IN HEREFORDSHIRE IN THE 21st CENTURY

Introduction

Herefordshire Council is committed to working in partnership with parents, schools, settings, colleges and their stakeholders together with other partners to meet the wider Every Child Matters agenda and the requirements of the Children's Act. A prime aim is to ensure that the school system is fit for purpose, will sustain improvement in the years ahead, and is able to meet the changes and challenges to come. This does include all five outcomes for children, given the significant impact schools can have on the broad life of a child.

This Statement of Principles will guide our work, set our standards, underpin our values and inform the future organisation of schools to enable us, with partners, to give the best opportunities and the best outcomes for all learners. Our aims for all our children and young people are:

- that they all can have the best start and maximise progress in their education;
- that through their learning and entitlement they can develop all their abilities and talents to achieve the highest standards;
- that through high quality provision and support they can realise the highest aspiration and expectations for their benefit and that of the whole community;

- that such a sound foundation will prepare them for a positive and fulfilling adult life as citizens living in a global context.

To deliver this vision, resources will have to be used to maximum effect. The provision of school places and school organisation are major determinants in how resources are allocated and expended. Once the principles on which to base educational provision have been agreed, the review of school provision will make proposals which will deliver the vision. Decisions taken now will shape provision over the next 20-30 years.

In developing the Statement of Principles we have taken account of the vision, ambitions and local priorities set out in the

- Herefordshire Partnership Plan;
- The Children and Young People's Plan;
- The Early Years & Childcare Plan;
- The Education Asset Management Plan;
- The 14-19 Learning Entitlement for Young People.

In these strategic plans there are common themes aiming to build an equal and inclusive society; to realise the potential of individuals and communities, to seek continual improvement and to provide excellent education, training and learning opportunities in Herefordshire for all ages.

It is noted that the Local Authority does have a changing role in terms of school provision. No longer are its statutory responsibilities centred on providing sufficient places and maintaining standards of teaching and learning. It also has duties to seek

more diverse provision and offer choice to parents. The DCSF envisage that the Local Authority will act as a strategic planner, commissioning places from schools.

STATEMENT OF PRINCIPLES

1. The Best for All of Herefordshire's Children and Young People

We place the child/young person, his/her needs and the development of his/her potential, at the centre of all we do. We base our strategies and decisions on what will benefit the education and welfare in the widest sense of all Herefordshire's children and young people.

In line with the holistic approach under Every Child Matters, we believe that, with consistent nurture, support and encouragement from their schools, peers, family and community, our children/young people can succeed in their learning and grow into mature, healthy, well-rounded individuals who contribute positively to society.

We seek the greater involvement of children and young people, individually and collectively, in the development of their learning and self-esteem by taking account of learner voice, opinions and assessments in a variety of forms. We value their contribution to developing provision and appropriate educational pathways.

Practical Steps

- The Local Authority in conjunction with School Improvement Partners will provide advice, support and challenge to secure continual improvement in the work of schools delivering all five outcomes;
- Schools will be encouraged to develop extended services for children and families;

- The role of schools in providing services and co-located bases for multi-professional teams delivering services across the five outcomes will be considered in the development of integrated services, and creation of 'teams around the child';
- The Shadow Partnership Board and Youth Council will be consulted as part of the current school review;
- The statutory requirement to review any school placed in a negative Ofsted Category will be achieved through a report with recommendation for any future action to the Cabinet Member for Children & Young People.

2. **Equity:**

We believe that all children and young people should be equally valued and should have a common entitlement in their school, settings and in the community educational partnerships. We believe that educational strength, expertise and experience should be shared for the benefit of all, and the enterprise and innovative capacity of individual schools must contribute to the collective resources in the county.

In an era of diversity, specialism and declining numbers, parental preference can best be addressed within a county-wide strategic framework, which ensures a high quality entitlement for all, supplemented by enrichment opportunities available through collaborative working between schools and other providers.

Practical Steps

In order to achieve the aims of equity and excellence for all in the context of limited financial resources and falling rolls,

- We acknowledge the need to review and refine the funding mechanisms for schools to establish greater parity between schools, and also broaden opportunities for pupils in the overall provision;
- We will encourage and facilitate networking and opportunities for collaboration;
- Advice, support, training and resources will be made available to schools to allow them to be inclusive with appropriate access to the curriculum for all;
- Schools need to be supported in developing skills to meet the full range of pupil needs, carefully monitoring outcomes and targeting resources to greatest effect;
- Current transport arrangements will be revised in light of national initiatives to ensure that expenditure is focused on services which improve access to these groups most in need.

3. **Partnership:**

With other agencies, we positively embrace responsibilities set out in the Children Act 2004, and this will be reflected in our vision, strategies and plans. We believe in open and constructive partnership working with and between schools, key agencies and parents/carers to ensure we deliver a first class education service that meets the needs of each learner. Indeed in a rural area, partnership working between schools is likely to be the only way in which some specific needs of individual learner can be met.

Practical Steps

To achieve better outcomes for our children and young people, we will work together with partners to create new structures or arrangements in the development of a flexible learning organisation that can successfully face new challenges as they emerge. At present, this includes a review of the role of the school in association with the private and voluntary providers in delivering the Foundation Stage to children under 5, and the work within the 14-19 Strategy to develop individualised/personalised curricula for all pupils, prior and post-16.

4. **Diversity:**

We recognise the benefits of considering diversity of provision in pursuit of equity, inclusion, improvement and innovation, so that provision can be shaped to meet the particular circumstances of various areas of the County.

Practical Steps

The local authority will consider action which will

- select from the range of national initiatives i.e. Academies, Trusts, Federations (and where appropriate adapting them to local circumstances), to support the transformation of primary and secondary schools to sustain a first class service;
- endorse and promote new arrangements in school organisation such as co-locations and amalgamations of infant and junior or primary and secondary schools, mergers and federations, where these are the most appropriate means of sustaining or improving standards and services in the locality, and that improvement is demonstrable;
- encourage community focused schools, at times working in clusters or networks, to provide local access to high quality education for children of all ages and adults, and to offer access to other services such as Health where that is appropriate;
- achieve co-located provision with other agencies on school sites to further the effective delivery of the ECM agenda through the aligned development of children's centres and extended services;
- consider different legal status for schools, where this is judged to bring significant benefit to children and young people.

5. **Leadership:**

Strong leadership from the local authority, headteachers and school governing bodies is essential to meet the evolving agenda and to manage the changes. We recognise the strength of leaders in Herefordshire, and will continue to support and challenge them to ensure a high quality experience for learners through a period of change.

Practical Steps

We will work in partnership with headteachers and governors to create:

- a shared vision amongst leading professionals built upon common values and principles;
- a passion for excellence;
- a commitment to working collaboratively with many partners for the benefit of Herefordshire learners;
- a commitment to each other to support, to challenge and to lead;
- a willingness to consider the development of new ways to disseminate best practice and generate new approaches to improve the service;
- with the cooperation of Governing Bodies, internal arrangements which allow headteachers at least 50% non-teaching time;
- the opportunities for different models of school leadership through, for example, federated schools.

6. Additional Needs:

We believe in equal opportunities and in positive, active intervention for children with additional needs and those who are vulnerable.

Practical Steps

We aim to ensure that:

- the needs of these children and young people are identified at an early stage so that the school and, where necessary, specialist staff can intervene speedily and appropriately with greater emphasis on in-school provision;
- a continuum of provision is developed which has greater flexibility to ensure access to the best outcomes for an individual as no single school or setting can meet all needs at all times;
- there is appropriate transition or transfer arrangements for pupils between school and specialist settings, which include short-term intervention or part time placements, and flexibility between sectors;
- a broad, personalised curriculum is provided and presented in an innovative, vibrant, exciting and challenging way. This will offer, particularly at KS3 and KS4, a diverse menu of alternative curriculum pathways to meet the needs of individuals and, in so doing reduce the incidence of exclusion;

- those pupils who have become disaffected or have been excluded will be encouraged and supported to re-engage in their education within their own school or at another local school as quickly as possible so that they have the maximum chance of success;
- Herefordshire's specialist provision is developed so that only a few children with the most complex low incidence need will have to go outside our boundaries.

7. Resources:

We recognise that a high quality of teaching and learning exists in Herefordshire schools. However, we also acknowledge the need for schools to be fully fit for purpose for the challenges already posed in the first two decades of the twenty-first century, and to be appropriately resourced in terms of finance, staffing, materials, equipment and accommodation.

Practical Steps

In order to achieve this

- The Local Authority will continue to campaign for more equitable funding for Herefordshire;
- resources will be focused to achieve maximum effect and will be directed to priorities;
- the LMS Scheme will be reviewed to reduce the resources allocated under non-pupil factors e.g. floor area;
- proposals will be brought forward to reduce the percentage of budget spent on non-teaching costs;
- e-learning opportunities will be advanced through ICT systems and infrastructures;
- capital investment will be made, as resources allow, to ensure that buildings and facilities support the drive to improvements in teaching and learning;

- permanent need will be met in permanent buildings, which, where provided through new capital investment, will be built on sustainable principles;
- resources will be focused on those areas which have greatest impact on teaching and learning, through by reducing surplus space through changes in school organisation and in the LMS Scheme;
- schools will be supported in developing and sustaining partnerships to improve local access to specialist staff, resources and services which can be better provided collaboratively than individually;
- training programmes will be provided to ensure that all staff have access to high quality training and development to maintain and improve standards and to demonstrate and disseminate best practice.

8. A Community of Schools:

We are committed to maintaining a community of schools in Herefordshire that primarily serve their local area but may also allow for parental preference, accessing the curriculum and extended services on a strategic countywide basis. In maintaining this commitment to quality and excellence in a time of falling rolls and increasing demands, we recognise that we cannot compromise on quality in times of scarcity.

Practical Steps

- The review will produce a robust Strategic framework within which all maintained schools, whatever their status, will have a place;
- Those schools exploring changes of status will be supported by the Local Authority on the understanding that the change of status will not affect the role of that school in the strategic framework;
- The Membership of Schools Forum and the Local Admission Forum will be reviewed in light of any changes in school status;
- We will endeavour to restrict pupil travel time to primary schools so that no child or young person, unless by choice, has to travel more than 30 minutes to school.

9. Schools within their Community:

The tangible and often intangible value that both primary and high schools can have in their community is acknowledgeable, and every effort should be made to improve that

relationship. First and foremost schools should be valued for presenting excellent education for children living in the area they serve. Through the extended schools initiative schools should increasingly offer additional experiences to their children, services for their parents, and to members of the public in the locality. As publicly funded and maintained buildings schools are one of the most valuable assets in the public domain in Herefordshire. Full use of these assets should be sought, but in a way which does not undermine their core role.

Practical Steps

The Local Authority will:

- Encourage and support schools to offer wider range of services;
- Advise on and support appropriate third party use of school buildings and sites managed through school governors;
- Consider the community provision made by the school in any debate over change.

INDEPENDENT CONSULTANT'S REPORT ON SCHOOL FUNDING

HEREFORDSHIRE SCHOOL FUNDING

1. This paper is an attempt to set out in clear and understandable terms the arrangements for funding Herefordshire schools. It demonstrates the impact of maintaining the status quo as well as considering the implications for any future changes. All scenarios are hypothetical and are set out purely as an aid to the Task Group's considerations.
2. The Dedicated Schools Grant (DSG) from central government is paid as a ring-fenced specific grant and must be used in support of the Schools Budget as defined in the School Finance (England) Regulations 2008. It is the main source of income for the Schools Budget and can be used for no other purpose. There are specific requirements to ensure appropriate use:-
 - i. At notification stage the authority is required to submit a statement certified by the Chief Finance Officer that the DSG is being deployed in support of the Schools Budget.
 - ii. At outturn stage the authority is required by the Accounts and Audit (Amendment) (England) Regulations 2006 to append an additional note to the Statement of Accounts confirming the deployment of the DSG in support of the Schools Budget (Appendix 1).
 - iii. The Chief Finance Officer is also required to confirm final deployment of the DSG in support of the Schools Budget in connection with the Section 52 outturn form.
 - iv. The Secretary of State reserves the right to recover the grant if there has been any breach.
3. The DSG is based upon a per pupil formula and issued to all English local authorities with responsibility for education to enable and support the delivery of provision, services and statutory processes for all children and young people.
 - i. The current methodology (Spend Plus) underlying the allocation of DSG to individual local authorities is determined by central government and has been used for the years 2008-9, 2009-10 and 2010-11. A national review of the distribution formula for DSG is currently being undertaken and will be in place from 2011-12.
 - ii. The Department for Children, Schools and Families (DCSF) allocation to Directorates is calculated on the January School Census submissions from schools and nurseries. A fixed amount is identified per pupil and this is then multiplied by the totals submitted through the School Census.

- iii. Local authorities are responsible for determining the split of the grant between central expenditure (to support appropriate and statutory central services) and the Individual Schools Budget (ISB) in conjunction with the Schools Forum which makes recommendations to a council's Cabinet on such allocations.
 - iv. The ISB is deployed directly to schools through a locally agreed formula allocation.
4. It is worth setting Herefordshire within the national funding context for schools and noting that national funding reflects factors such as deprivation which affect urban and rural areas in different ways. The county has one of the lowest funding levels of the nationally distributed DSG at an overall ranking of 147 out of 149. Consequently, DSG allocations for Herefordshire fall well below the average for the country. In 2008/2009 the DSG per pupil allocation in Herefordshire (not including any grants) was £3,687 whilst the national average was £4,066. Any financial planning has therefore to consider the low baseline from which the authority starts. It is not anticipated that the current revision of the funding allocation process at national level will significantly improve the position in Herefordshire, though officers and Members have been keen to highlight the issues facing a rural authority.

i. Table 1 - illustrates the actual DSG funding for Herefordshire up to 2008/9.

Year	Pupil Data	Amount per pupil (rounded) £	% per pupil increase	DSG Total £	% cash increase
06/07	23,705	3,297		78,151,000	
07/08	23,427	3,523	6.9	82,535,000	5.6
08/09	23,101	3,687	4.7	85,162,000	2.4

(Source: Teachernet, Final Allocations of DSG 2008/9)

- ii. Table 2 - uses the Government's assessment as at October 2008 to project through to 2011 assuming no change in the current model of provision.

Year	Pupil Data inc the academy	Amount per pupil (rounded) £	% per pupil increase	DSG Total inc the academy £	% cash inc	DSG Total for the LA excl the academy £
09/10	22,759	3,830	3.9	87,176,000	2.4	84,291,000
10/11	22,562	4,002	4.5	90,296,000	3.6	87,411,000

(Source: Teachernet, Revised Indicative DSG Allocations 2008-11)

Any future revised figures from central government will separate pupil numbers, and hence finances, for the Hereford Academy, which will make direct comparisons with previous years more difficult.

- These tables evidence the impact of falling rolls upon the total amount of DSG received, but this is in part masked by the yearly increase in the amount of per pupil funding.
- The yearly increase is made in order to meet inflationary pressures.
- The actual cash increase is much lower than the per pupil increase for each period as a result of the reduced pupil numbers.
- It is evident that in relative terms overall funding is reducing as a result of a decrease in pupil numbers.

- iii. Table 3 identifies the decline in pupil numbers between 2006-7 and 2010-11 and the related reduction in overall funding through DSG:

Year	Status	Pupil Reduction	Amount per pupil £	DSG Reduction £
06/07 - 07/08	Actual	278	3,523	979,394
07/08 - 08/09	Actual	326	3,687	1,201,962

08/09 - 09/10	Actual	342	3,830	1,309,860
09/10 - 10/11	Projected	197	4,002	788,394
Average		286	3,760	1,075,360

5. It is important to recognise the full implications of the reduction of this DSG allocation. As shown Appendix 1, a proportion of the funding is legitimately spent on centrally held services and the remainder goes into schools. The funding of Individual School Budgets is through a complex formula agreed with schools known as Local Management of Schools or LMS. In 07/08 schools received an average of £2,500 per pupil on roll supplemented by additional funding for Additional Pupil-led funding (such as nursery classes), Special educational Needs, Social deprivation, Site Specific (such as playing field maintenance costs) and School Specific (such as rates, small school protection, and flat base allocations for premises and management costs).

Using 2008-9 to illustrate:

- i. Based on the Government's figures there is a loss of 342 pupils between January 2008 and 2009 and one less pupil means £3,687 less in the DSG (based on 08/09 funding rates).
- ii. For each pupil lost, a school budget will be reduced by an average of £2,500 for pupil related funding.
- iii. For each pupil lost, £1,187 will need to be found from within central services funded by DSG.
- iv. An annual reduction of 342 pupils will mean a reduction in funding of £406,000 (i.e. 342 x £1,187) which will need to be found from centrally retained services such as Pupil Referral units (£0.895m), Special Educational Needs Support Services (£1.376m), Banded Funding (£0.858m), Nursery Education Funding (£2.923m), Fees for pupils at independent special schools (£0.951m) and other central staffing budgets such as school admission and asset management.
- v. If the reductions in pupil numbers disproportionately affect primary schools, then the amount required from centrally retained budgets will be greater. Fixed costs in primary schools form a greater proportion of the budget, and therefore the pupil related funding in primary school budgets is only £2,000 per pupil leaving a shortfall of £1,687 per pupil.
- vi. It is unlikely that significant reductions can be made in some of these areas; however, because of their statutory nature. To continue to provide these

statutory services it is anticipated that further reductions in per pupil funding will be required every year to make up the shortfall.

- vii. Overall pupil numbers are projected to continue to fall until 2018 at the same rate and therefore it is possible that these budget reductions will have to be found each year until 2018.
6. The full impact upon schools and services of falling rolls and DSG finances will also be affected by the following:
- i Fixed costs (rates, premises costs, salaries of headteacher and secretary) may remain constant or increase in line with inflation whilst overall budgets reduce;
 - ii Maintenance of standards and improvements in achievement and attainment will require investment;
 - iii New initiatives and National Strategies will require investment;
 - iv Parental preference may impact further upon pupil numbers in settings;
 - v Staffing profiles and appointments within schools may require additional funding.
7. There is already an increase in the number of schools experiencing financial difficulties and operating with deficit budgets and this is set to continue. Planning is underway with these settings to ensure that schools address the budget difficulties. Even so it will clearly be increasingly challenging to maintain the current models of provision and probably untenable in the medium to longer term.

i. Table 4 identifies the number of schools with deficit budgets since 2003:

Year	Primary Schools	High Schools	Special schools	Total number of schools	Total Deficit £
03-04				0	0
04-05				0	0
05-06	2			2	11,000
06-07	4	2	2	8	252,000
07-08	6	2	1	9	398,000
08-09	4	1	1	6	262,477

(Source: School Budget Team)

NB Not all the schools in this category are small schools.

8. In order to further identify the future funding implications for schools, the table in Appendix 2 sets out indicative school budgets according to school size and estimated average pupil population. This financial model does assume that trends will continue and includes adjustments for inflation. The figures shown include current small schools protection allowance for Primary Schools at £109.80 per pupil below 200 on roll and for High Schools at £215.35 per pupil below 655 on roll. These amounts have been fixed on the recommendation of Schools Forum for the next two financial years i.e. until end of March 2011. It is noteworthy that in the primary sector 63 schools have below 200 pupils, and in the secondary sector 6 schools fall below 650. This means that 69 schools will receive some form of protection.
9. The methodology for DSG allocation is set until 2011. This gives some degree of certainty in funding projections to that point. In order to demonstrate the affect of falling school rolls on individual schools over the three year period, the table in Appendix 3 outlines indicative budgets according to cluster allocations using January 2008 pupil numbers. (It is anticipated that a model using January 2009 actual pupil numbers will be available by the end of July.) However, the allocation per pupil varies from school to school. This is because each school has an individual set of circumstances which determine the ISB allocation it receives.
10. Maintaining the status quo in terms of numbers of settings means that:-
- i. The total small schools protection element was £958,609 in 2008/9. Schools Forum agreed that the budget for small schools protection should be frozen at the 2006/7 cash total and this will continue for the next two financial years i.e. until the end of March 2011. If the number of schools requiring an element of protection increases, the amount per school will reduce. However, this is effectively reducing the overall amount for distribution to all schools.
 - ii. Every school receives a fixed base allocation for management and premises as shown below in Table 5.

	2008/9	2009/10	2011/12
	£	£	£
Primary	29,292	30,083	30,714
Secondary	13,681	14,051	14,346
Special	11,876	12,196	12,453

(Source: **School Budget Team**)

- iii. As agreed by Schools Forum, every school in Herefordshire, regardless of how many pupils, receives a minimum level of funding. The following simple example (Table 6) illustrates this by showing the minimum a school received in 2008-9, without showing pupil funding and without showing specific funding such as playing field maintenance or the current Key Stage 1 class size element:-

	Small schools protection £	Base allocation for management £	Base allocation for premises £	Minimum funding (without pupil related funding) £
Primary (60pupils)	*15,372	25,473	3,819	44,664
Secondary (500pupils)	**33,379	8,029	5,652	47,060

The figures shown include current small schools protection allowance for Primary Schools at £109.80 per pupil below 200 on roll and for High Schools at £215.35 per pupil below 655 on roll.

* (200 - 60 = 140 x £109.80)

** (655 - 500 = 155 x £215.35)

11. Trends in falling pupil numbers and attendant reductions in funding will require a re-evaluation of existing provision necessitating consideration of a schools reorganisation. The local authority has a duty to ensure that it achieves the most effective use of resources available in the quest to raise the achievement of all children and young people in its schools. This process could be assisted by increasing funding to directly support teaching and learning in schools by reducing levels of funding currently maintaining individual premises in various forms of protection. It is evident that any school reorganisation producing fewer schools will result in a combination of savings including fixed costs for individual premises and the small schools protection element. All remaining schools will benefit from these savings as they will stay within the ISB for redistribution via the funding formula across a smaller number of schools. This strategy has worked in other authorities and has proven to be a successful model leading to the development of enhanced provision.

12. Several pertinent financial considerations will emerge as a result of any school reorganisation, the most significant being possible staff redundancies and the additional cost of transport for pupils. It is possible to provide more detailed and accurate financial plans for future provision design once the Task Group is able to provide the key criteria on which to base any such exercise.

Appendix 1: Disclosure of deployment of Dedicated Schools Grant

Financial year 2006/7 Statement

Source: Herefordshire Council's Published Accounts 2006/7

The council's expenditure on schools is funded by grant monies provided by the Department for Education and Skills, the Dedicated Schools Grant (DSG). DSG is ring-fenced and can only be applied to meet expenditure properly included in the Schools Budget. The Schools Budget includes elements for a restricted range of services provided on an authority-wide basis and for the Individual Schools Budget, which is divided into a budget share for each school. Over and under spends on the two elements are required to be accounted for separately.

Details of the deployment of DSG receivable for 2006/07 are as follows:

	Central Expenditure £000	Individual Schools Budget £000	Total £000
Original grant allocation to Schools Budget for the current year in the authority's budget.	8,324	70,012	78,336
Adjustment to finalised grant allocation	(185)	0	(185)
DSG receivable for the year	8,139	70,012	78,151
Transfer from DSG to Capital	(220)	0	(220)
Transfer from DSG to Sickness Reserve	(44)	0	(44)
Actual expenditure for the year	(7,769)	(70,503)	(78,272)
(Over)/under spend for the year	106	(491)	(385)
Planned top-up funding of ISB from council resources	6	0	6
Use of schools balances brought forward	0	602	602

**(Over)/under spend carried forward to
2007/08**

112	111	223
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Financial year 2007/8 statement

Source: Herefordshire Council's Published Accounts 2007/8

The council's expenditure on schools is funded by the Dedicated Schools Grant (DSG) provided by the Department for Children, Schools and Families. DSG is a ring-fenced grant and can only be applied to meet expenditure properly included in the Schools Budget. The Schools Budget includes elements for a restricted range of services provided on a council-wide basis and for the Individual Schools Budget, which is divided into a budget share for each school. Over and under spends on the two elements are required to be accounted for separately.

Details of the deployment of DSG receivable for 2007/08 are as follows:

Total	Central Expenditure	Individual Schools Budget	Total
2006/07	2007/08	2007/08	2007/08
£000	£000	£000	£000
78,336 Original grant allocation to Schools Budget for the current year in the authority's budget.	8,317	73,575	81,892
(185) Adjustment to finalised grant allocation	504	139	643
78,151 DSG receivable for the year	8,821	73,714	82,535
0 DSG brought forward	112	111	223
(220) Transfer from DSG to Capital	0	0	0
(44) Transfer from DSG to Sickness Reserve	(45)	0	(45)
(78,272) Actual expenditure for the year	(8,200)	(73,120)	(81,320)
(385) (Over)/under spend for the year	688	705	1,393
6 Planned top-up funding of ISB from council resources	45	0	45
602 Movement in schools balances		(239)	(239)
223 (Over)/under spend carried forward	733	466	1,199

Financial year 2008/9

The formal statement relating to 2008/9 is not yet available as the council is still in the process of finalising its accounts.

Draft DSG note to 2008/09 Accounts

	Central Expenditure £000	Individual Schools Budget £000	Total 2008/9 £000
Original Grant Allocation to Schools Budget	8,920	75,564	84,484
Adjustment to finalise grant allocation	0	678	678
Sub-total	8,920	76,242	85,162
less finalised recoupment re Academies	0	-1550	-1550
DSG receivable for year	8,920	74,692	83,612
DSG Brought forward	0	1,199	1,199
Transfer to sickness reserve	-6	0	-6
Transfer to school rates reserve prior to 2008/09	0	-868	-868
Actual Expenditure for the year	8021	74397	82418
Underspend	905	805	1710
Planned top-up	0	0	0
Movement in school balances	0	-181	-181
Underspend/overspend C/fwd	905	624	1519

Note: DSG carried forward for the ISB includes £186k for rates rebates in 2008/09

LEA Benchmarking Information

Herefordshire compares favourably with its statistical neighbours in relation to the amount of DSG and school grants spent on central expenditure. The following table illustrates the relevant elements per pupil for 2008/09:

	Individual School Budget + grants £	Central expenditure £	Central expenditure as % of total available	Total Schools Budget £
Herefordshire	3,879	532	12%	4,411
Gloucestershire	3,767	708	16%	4,475
Shropshire	3,703	885	19%	4,588
England (mean)	4,178	633	13%	4,811

Source: **DfES Leagateway benchmarking,**

Section 52 data – statistical neighbours

14th May 2009

More detailed information can be provided from Section 52 Benchmarking information if required.

INDICATIVE SCHOOL BUDGETS BY POPULATION – 2008-2011

PHASE + SIZE	NO. SCHOOLS	AVERAGE PUPIL NUMBERS				FORMULA BUDGET		
		January 08	January 09	January 10	08/09	09/10	10/11	
Primary -50	3	40	40	40	£161,227	£160,354	£160,512	
Primary 51-100	32	75	75	75	£258,698	£257,926	£254,718	
Primary 101-150	14	115	113	111	£349,578	£344,365	£340,033	
Primary 151-200	14	169	166	165	£484,971	£476,738	£473,149	
Primary 201-250	7	215	211	207	£625,516	£615,551	£603,607	
Primary 251-350	4	311	306	295	£896,215	£883,574	£862,904	
Primary 351-600	7	436	435	436	£1,270,796	£1,262,196	£1,262,836	

High	300-650	6	451	447	447	£1,663,415	£1,638,793	£1,634,670
High	651-750	4	710	693	683	£2,598,479	£2,502,554	£2,459,146
High	751-1015	4	1015	988	979	£3,748,490	£3,638,650	£3,611,517

The table details full budget allocations which include small schools protection at a total rate of £672,415 for Primary Schools and £286,194 for High Schools for financial year 08/09. These amounts have been fixed on the recommendation of Schools Forum for the next two financial years i.e. until end of March 2011.

Appendix 3: INDICATIVE SCHOOL BUDGETS BY CLUSTER

COST CENTRE	SCHOOL NAME	DFES REF	Cluster	2008/09			2009/10			2010/11					
				No on roll	Formula	Amount per pupil	Estimated	Formula	Amount per pupil	Estimated	Formula	Amount per pupil			
				Jan-08	Budget	2008/09 DCBF	Jan-08	Formula	Amount per pupil	Jan-10	Budget	2010/11 base	2.75% inflation	2010/11 base	
AYLESTONE CLUSTER															
E0301	HEREFORD, AYLESTONE HIGH	4015	AV	1,012	3,652,688	3,609	885	3,257,574	3,681	819	3,090,787	3,774			
E0126	HEREFORD, BROADLANDS PRIMARY	2056	AV	296	905,070	3,058	272	844,662	3,105	259	818,691	3,161			
E0135	HEREFORD, ST. JAMES' C.E. PRIMARY	3332	AV	201	524,242	2,608	202	524,389	2,596	211	543,972	2,578			
E0138	PRIMARY	3382	AV	216	588,617	2,725	210	572,853	2,728	183	516,259	2,821			
E0155	MARDEN PRIMARY	2115	AV	92	295,709	3,214	90	289,074	3,212	50	251,522	3,239			
E0175	SUTTON PRIMARY	2154	AV	51	195,597	3,873	52	196,569	3,817	54	200,193	3,742			
E0177	WELLINGTON PRIMARY	2157	AV	122	390,333	3,213	104	350,922	3,391	90	322,622	3,605			
E0183	WILKINGTON PRIMARY	2160	AV	84	297,214	3,559	83	292,747	3,548	89	295,221	3,336			
	AYLESTONE PRIMARY CLUSTER TOTAL			1,681	3,188,782	3,014	1,012	3,071,218	3,038	875	2,988,480	3,087			
	AYLESTONE CLUSTER TOTAL			2,073	8,849,470	3,306	1,887	8,328,780	3,837	1,784	8,079,267	3,890			
BISHOPS CLUSTER															
E0302	HEREFORD, BISHOP OF HEREFORD'S BLUECOAT	4600	BI	1,192	4,422,351	3,710	1,188	4,353,657	3,655	1,186	4,335,704	3,548			
E0122	FOWNHORE, ST. MARY'S C.E. PRIMARY	3325	BI	92	290,003	3,152	94	294,476	3,133	95	292,683	3,081			
E0127	HEREFORD, HAMPTON DENNE PRIMARY	2057	BI	232	896,553	3,652	216	819,423	3,794	200	762,486	3,912			
E0137	HEREFORD, ST. PAUL'S C.E. PRIMARY	3333	BI	432	1,083,545	2,509	423	1,069,013	2,504	418	1,047,764	2,507			
E0156	LUGWADINE PRIMARY	2102	BI	153	418,496	2,735	146	403,341	2,763	144	413,022	2,868			
E0161	MORDIFORD C.E. PRIMARY	3078	BI	113	332,100	2,939	111	325,297	2,931	108	316,430	2,930			
	BISHOPS PRIMARY CLUSTER TOTAL			1,622	2,881,087	2,817	890	2,801,650	2,831	886	2,862,385	2,865			
	BISHOPS CLUSTER TOTAL			2,214	7,403,448	3,344	2,178	7,565,207	3,831	2,161	7,179,088	3,838			
FAIRFIELD CLUSTER															
E0310	PETERCHURCH, FAIRFIELD HIGH	4032	PF	366	1,414,140	3,864	368	1,420,241	3,859	366	1,400,805	3,827			
E0114	CLIFFORD PRIMARY	2031	PF	67	243,556	3,635	69	246,791	3,577	68	242,684	3,569			
E0155	LONGTOWN PRIMARY	2101	PF	41	167,360	4,132	44	175,485	4,034	45	177,263	3,983			
E0160	MICHAELCHURCH ESCLEY PRIMARY	2116	PF	62	218,826	3,529	61	214,570	3,518	57	202,290	3,549			
E0167	PETERCHURCH PRIMARY	2122	PF	63	252,252	4,005	68	264,343	3,887	70	267,694	3,824			
	PETERCHURCH PRIMARY CLUSTER TOTAL			233	882,034	3,794	242	801,189	3,782	240	809,881	3,718			
	PETERCHURCH CLUSTER TOTAL			689	2,296,174	3,837	610	2,321,490	3,809	606	2,290,798	3,783			

KINGTON CLUSTER												
E0307	KINGTON, LADY HAWKINS	4022	LH	424	1,608,151	3,793	409	1,551,641	3,794	413	1,577,843	3,820
E0100	ALMELEY PRIMARY	2001	LH	80	285,651	3,321	78	259,081	3,322	73	252,705	3,462
E0119	EARDSLLEY C.E. PRIMARY	3035	LH	72	231,118	3,210	73	232,498	3,185	67	236,067	3,523
E0146	KINGTON PRIMARY	2096	LH	204	598,689	2,942	201	597,806	2,932	200	570,584	2,860
E0165	PEMBRIDGE C.E. PRIMARY	3366	LH	59	259,918	2,928	58	265,808	2,915	56	268,204	3,002
	KINGTON PRIMARY CLUSTER TOTAL			466	1,885,378	3,048	459	1,865,188	3,037	438	1,847,660	3,084
	KINGTON CLUSTER TOTAL			879	2,893,627	3,408	859	2,818,834	3,388	849	2,825,403	3,448
LEOMINSTER CLUSTER												
E0309	LEOMINSTER, THE MINSTER COLLEGE	4027	M	603	2,392,649	3,968	578	2,312,618	4,001	574	2,302,484	4,011
E0102	BODENHAM, ST. MICHAEL'S C.E. PRIMARY	3304	M	106	312,798	2,951	105	310,220	2,954	108	316,566	2,931
E0142	KIMBOLTON, ST. JAMES' C.E. PRIMARY	3341	M	91	282,245	3,102	90	278,325	3,093	94	282,166	3,002
E0150	LEOMINSTER INFANTS'	2099	M	237	732,497	3,051	237	727,439	3,059	246	749,115	3,045
E0151	LEOMINSTER JUNIOR	2100	M	338	976,154	2,898	332	962,024	2,898	311	928,354	2,985
E0152	LEOMINSTER, IVINGTON C.E. PRIMARY	3349	M	86	295,514	3,436	87	296,709	3,410	87	292,570	3,363
E0157	LUSTON PRIMARY	2103	M	109	328,639	3,015	113	338,362	2,995	112	335,077	2,992
E0173	STOKE PRIOR (LEOMINSTER) PRIMARY	2148	M	75	252,404	3,365	73	246,057	3,371	67	236,209	3,526
	LEOMINSTER PRIMARY CLUSTER TOTAL			1,642	3,190,261	3,062	1,637	3,159,168	3,048	1,625	3,140,067	3,083
	LEOMINSTER CLUSTER TOTAL			1,846	5,672,890	3,388	1,816	5,471,774	3,388	1,809	5,442,641	3,404
BROMYARD CLUSTER												
E0300	(BROMYARD) QUEEN ELIZABETH HIGH	4004	OE	303	1,217,032	4,017	304	1,207,678	3,973	298	1,181,883	3,966
E0105	BREDENBURY PRIMARY	2011	OE	62	245,387	3,958	66	255,126	3,965	70	264,597	3,780
E0108	BROCKHAMPTON (BROMYARD) PRIMARY	2014	OE	153	435,540	2,847	148	421,684	2,845	143	410,263	2,885
E0109	BROMYARD, ST. PETER'S PRIMARY	2024	OE	200	585,566	2,835	199	593,242	2,817	199	595,108	2,797
E0111	BURLEY GATE C.E. PRIMARY	3010	OE	94	342,423	3,643	99	355,202	3,688	97	338,954	3,494
E0166	FENCOMBE C.E. PRIMARY	3367	OE	53	183,318	3,459	55	187,535	3,410	56	188,975	3,375
E0180	WHITBOURNE C.E. PRIMARY	3109	OE	67	231,771	3,459	66	227,998	3,455	59	197,580	3,345
	BROMYARD PRIMARY CLUSTER TOTAL			829	2,804,806	3,189	833	2,808,798	3,173	824	1,865,477	3,138
	BROMYARD CLUSTER TOTAL			882	3,221,837	3,468	857	3,214,484	3,432	822	3,137,860	3,406
ST MARY'S CLUSTER												
E0304	HEREFORD, ST MARY'S R.C. HIGH	4601	SM	699	2,389,054	3,418	693	2,347,221	3,387	695	2,346,774	3,377
E0133	HEREFORD, OUR LADY'S R.C. PRIMARY	3330	SM	203	547,258	2,696	207	553,631	2,676	206	552,368	2,691
E0134	PRIMARY	3331	SM	210	530,759	2,527	207	523,117	2,527	201	510,462	2,540
E0169	ROSS-ON-WYE, ST. JOSEPH'S R.C. PRIMARY	3372	JK	109	307,261	2,819	109	305,023	2,808	113	317,943	2,814
	ST MARY'S PRIMARY CLUSTER TOTAL			622	1,885,278	2,864	623	1,882,871	2,844	620	1,880,773	2,865
	ST MARY'S CLUSTER TOTAL			1,221	3,774,372	3,081	1,218	3,738,192	3,088	1,216	3,727,647	3,088

Issued 2004 – School Organisation Plan
Section 2 – Policies Relevant to the Provision of School Places

B. Maintenance of high standards

2.17 Most areas of the County are served by one school, geography and travelling times limiting choice. In recognition of the practical constraints on parental preference, therefore, the LEA accepts that it is imperative for standards to be maintained at the highest possible level at all schools. This is done through the Education Development Plan.

C. Education Development Plan

2.18 The EDP recognises the current structure of school provision (notably the large number of small primary and high schools,) and the context of falling roles. With that background, the EDP has identified 7 priorities in the school improvement programme. There are listed below, with comments provided on the links to the SOP.

EDP Priority	Link to SOP
1. Raising attainment in the Early Years towards the early learning goals and in primary education, especially numeracy and literacy.	The support offered through the EDP reflects the reliance on private and voluntary settings in early years, and the large number of small primary schools where mixed aged and sometimes mixed Key Stage teaching is found.
2. Raising attainment at Key Stage 3	The organisation of high and primary schools in partnerships should facilitate a smoother transition from Key Stage 2 to Key Stage 3.
3. Raising attainment at Key Stage 4 and post- 16	This in part is being processed through the 16-19 curriculum is one strategy which will help.
4. Tackling underachievement and narrowing the performance gaps though a focus upon PE, sport and the creative arts	The Specialist College Initiative is one way in which this can be pursued.
5. Support for Schools causing concern	The SOP contains the ultimate sanction of reviewing the future of a school in special measures.
6. Inclusion	Provision for children with special education needs is largely in mainstream schools, with places available in special schools for those with particular needs.
7. Using ICT to improve teaching and learning in a rural county	New technology is seen as one way to maintain existing provision and improve standards at a time of falling rolls, by encouraging collaboration between schools and sharing good practice.

2.19 In the interests of maintaining high standards, the Council provides appropriate financial and curriculum support for all schools, however small individually they may become. This is in line with the Audit Commission's view expressed in 'Trading Places' where it states:-

"If small schools and small sixth forms are not going to be closed as part of an LEA's efforts to secure the right number of places in the right locations, then other ways must be found of managing the financial and educational problems that they create. For example:

- *Financial support to small schools via protection factors in the LMS formula should be targeted to those schools that the LEA believes to be essential. LEAs can also promote clustering arrangements, which bring groups of small schools together to share expertise and resources (for example, specialist teaching staff whom none of the schools could fund wholly from its individual budget); and*
- *Sixth forms with a number on roll of less than 150 should be reviewed to ensure educational and financial health. Where problems are identified in a small sixth form, but closure is not felt to be desirable or possible, LEAs should explore the scope for encouraging collaboration with other sixth forms, the organisation of consortia or franchising arrangements."*

2.20 In Herefordshire, financial support for small schools is provided through the budget formula, by a combination of lump sum allocations per school, and through supplements for small schools with pupil numbers below defined thresholds so that –

- (a) even the smallest primary school can afford 2 teachers and other resources;
- (b) even the smallest high school can afford at least 12 teachers and other resources.

2.21 The Council also recognises the more limited curriculum and social experiences that small schools can provide. The Council, therefore, seeks to provide for wider opportunities by supporting, through its Education Development Plan, joint activities by groups or clusters of schools. Consideration is being given to proposals to extend these activities under the Extended School Initiative. The Council will also actively support more formal co-operative arrangements between schools, but believes that these can only be successfully created without imposition where there is a willingness in schools to move to such arrangements. The LEA will raise the possibilities of such partnerships where the situation arises, e.g. due to a Headteacher leaving or pupil numbers falling to the detriment to staff and curriculum provision.

2.22 The priorities within the Education Development Plan also take account of the significant proportion of both primary and high schools where the number of pupils in particular year groups is small. Specific attention is given to managing the literacy and numeracy strategies in mixed-age or whole Key Stage classes, and to addressing the issue of leadership through training, on-site support and by updating documentation related to the management of small schools.

D. Review of Small Schools and Surplus Capacity

2.23 The Audit Commission's advice, in the national report referred to in paragraph 3.18, recommends that primary schools with fewer than 90 pupils, and high schools with fewer than 600 pupils aged 11-15, should be identified to "determine whether these small schools should be retained or expanded/closed". (Trading Places: 'The Supply and Allocation of School Places'). Herefordshire Council believes that such figures

provide a useful general guide. However, some adjustment needs to be made for rural areas, as the DfES recognises in its draft guidance (received 3rd August, 1999) to SOCs –

The Secretary of State is concerned that in considering statutory proposals School Organisation Committees and Adjudicators have regard to the need to preserve access to a local school for rural communities. There should therefore be a presumption against the closure of rural schools. This does not mean that no rural school should ever close, but the case for closure should be strong and the proposals clearly in the best interests of educational provision in the area. The transport implications of rural school closures should also be carefully considered, including the welfare of the children, the recurrent cost to the LEA of transporting pupils to school further away, the effects on road traffic congestion, and the environmental costs of pupils travelling further to schools. The overall effect on the community of closure of the village schools should also be taken into account. Detailed guidance on particular factors that need to be considered in deciding such proposals is given at the end of this section.

- 2.24 Having considered the Audit Commission and DfES advice, it is accepted that, other things being equal, there are significant educational advantages for a 5-11 primary school to have at least 3 teachers. Under Herefordshire's funding arrangements, schools with 60+ pupils can normally afford 3 teachers on a full-time basis, whilst schools with 50+ pupils can normally fund about 2½ full-time teachers, making possible 3-teacher class arrangements for the mornings or afternoons. It is below such levels, therefore, that the educational viability of small schools should be reviewed. Similarly, the Council accepts that the ideal minimum size for an 11-16 secondary school is 3 or 4-form entry (450–600 pupils). Where such ideal sizes are not practical, however, the Council ensures that its arrangements for funding for schools provide reasonable levels of teaching resources (see paragraph above), so that a good range of curriculum options can be offered.
- 2.25 Herefordshire Council is committed to maintaining a good level of support for small primary and secondary schools, and advocates the maintenance of existing funding levels for sixth forms in schools, where such arrangements are appropriate. It believes that surplus space should initially be addressed through seeking alternative use rather than closure. At the same time, however, the Council does recognise that there comes a point at which the maintenance of an individual school or sixth form may need to be considered in the interest of ensuring that resources are used efficiently to achieve good value. Accordingly, the Council looks carefully at the annual return of surplus capacity in schools to decide whether or not fundamental review of particular schools or areas is required.
- 2.26 The Council also provides for thorough review of the circumstances when pupil numbers drop below defined levels at individual schools, though the Council also believes that small schools should be able to operate with a degree of reasonable certainty about their medium term future. The Council's overriding aim is to provide schools of a high standard, always seeking improvement, and it would undermine that objective if schools were distracted by continual uncertainties concerning their future existence. Any decisions concerning the future of particular schools would need to take account of community, transport and environmental factors as well as educational considerations.
- 2.27 The Council would normally review schools in the following circumstances.

Primary schools

- (a) a school with fewer than 36 pupils in the September of a school year, or a school whose numbers are expected to fall below that level within the following 5 years, would be reviewed by the Council, in consultation with the relevant Diocesan Education Authority where a Church school is concerned.
 - (b) schools with 36-45 pupils, which would be monitored by the Director of Education, with the relevant Diocesan Director of Education where a Church school is concerned, to assess whether or not numbers are likely to drop below 35 pupils within 5 years, and to determine whether or not there are other grounds for concern about the future of the school;
 - (c) where a pyramid of primary schools has unused capacity at a level that could accommodate the closure of the smallest school, with up to 15% unused capacity still remaining if such possible closure were to occur; or
 - (d) where a school is identified by Ofsted either as having serious weaknesses or in need of special measures;
- 2.28 If, following such review, a school is judged to be currently viable, then no further review of that school would be undertaken for at least 5 years, unless pupil numbers were to fall by a further 25% below the level considered during that review.

High schools

- (e) where a high school has fewer than 200 pupils on roll at the start of a school year; or
- (f) where a high school has sufficient unused capacity for all the existing and projected pupils to be accommodated in the nearest alternative school with up to 15% unused capacity still remaining if such possible closure were to occur; or
- (g) where a school is identified by Ofsted either as having serious weaknesses or in need of special measures;

Sixth forms (16-18)

- 2.29 The Learning and Skills Council has the responsibility for planning post-16 education, including the power to make proposals for opening, enlarging or closing Sixth Form provision.
- 2.30 The DfES has published a consultation paper on *Learning to Succeed - School Sixth Form Funding*. The document reiterates earlier statements that each sixth form would be guaranteed its current sixth form funding, provided pupil numbers are maintained.
- 2.31 That assurance is welcome in providing a broadly secure framework in which the provision made within individual schools can be reviewed though it is noted with some concern that the safeguards do not promise budget increases for schools whose numbers rise. Discussions are continuing with the DfES in an effort to ensure that the guarantee operates effectively for small sixth forms, serving isolated rural communities.
- 2.32 The potential for closer collaboration with local colleges and with other schools is being explored, with a view to widening the options and quality of provision for students in smaller sixth forms by the Herefordshire Association of Colleges and Schools. Having considered various options, there is a consensus that improvements to the existing framework of provision is the best way forward.
- 2.33 The review of post-16 provision by independent consultants in 2002 commissioned by the LSC confirmed that co-operation to improve existing provision is the best way forward.

Nursery Units in LEA Schools.

- 2.34 There is a concern that a significant number of places in LEA nurseries are not used. From discussions with schools, it appears that many parents prefer the more flexible arrangements available in private and voluntary playgroups including earlier starting times and longer sessional care than offered in the 13 LEA nurseries where 5 two and half hour sessions per week are available. Given that all 3 and 4 year olds can have free early years education from April 2004 and follow the same foundation stage curriculum whatever the setting, the schools with nurseries do feel that they are at a disadvantage despite the undoubted quality of provision. The LEA is considering the various issues involved including encouraging schools to work with voluntary providers to achieve full day care on the school site. In the meantime it is therefore proposed that a policy to review those nurseries which are less than 50% full in September of each year be adopted, assuming that capacities are reduced from 30 to 26.

E. Review of Catchment Areas

- 2.35 The community organisation of schools in the County depends on precise definition of catchment areas. There are, however, circumstances in which parts of the established catchment areas need to be reconsidered, most frequently when significant housing development and transport patterns cause the community focus to shift. It might also be appropriate to reconsider catchment areas where differential changes in pupil numbers cause some schools to be overcrowded, while others reasonably nearby still have spare capacity. Major issues to do with provision of catchment areas – whether generated by school or parental requests or by planning considerations – will be presented to the School Organisation Committee for information and comment following consultation with all relevant groups and individuals.
- 2.36 Although alteration in catchment areas may appear an easy and simple means to balance pupil numbers to places, in practice it is not and should only be undertaken if there are long-term benefits in making those changes. Change cannot necessarily happen overnight as it is good practice to allow and to honour transport arrangements of existing pupils.

The Strategic Development of Education for the 21st Century

Terms of reference for Task Group

Introduction

The Council decision on 21 January 2008 was that there would be no closures or major re-organisations of high schools during the lifetime of the current administration. The Council would continue to apply the existing Small Schools Policy for primary schools and that no closures would happen outside of that policy. The Small Schools Policy will be implemented appropriately.

Following on from 2 December 2008 conference and building upon the 21st Century principles document which had previously been agreed with head teachers, this task group has been established. The challenges facing Herefordshire are:

- Continuing to improve the quality of educational outcomes for children and young people
- The impact of falling rolls
- Financial
- Workforce reform, in particular succession planning

Purpose of Task Group

The task group is advisory to the Council and any decision on school provision will be political.

To establish a set of criteria to underpin the future of education and learning provision which can then be applied to establish a strategic development plan for the next ten years. This criteria will provide a framework upon which decisions will be made.

The task group will report regularly to the Chief Executive, to ensure direction, timeliness and cross check any issues that may require a broader, cross Council, County and partner approach. The Chief Executive and Director of Children's Services will then feed outcomes into the normal political process.

Membership protocols

- To bring together views of education and the communities
- Work will be undertaken in an open and supportive way
- Members of the task group will work in the interests of the whole county
- Minutes disseminated in three days. Minutes will record action points and key discussion points.
- May bring in representatives as required, e.g. bursars
- Enquiries from the press would be referred to Carla Preston (press office) and the independent chair.
- Regular updates immediately following the meeting would be agreed by the Cabinet Member / Independent Chair and Director of Children's Services

Membership

Independent Chair – David Brown
Cabinet Member, ICT, Education & Achievement
Director of Children's Services
Head of Improvement and Inclusion
Head of Planning, Performance and Development
Planning Policy Manager
Parish Liaison and Rural Services Manager

Representatives:

Diocesan Representatives:

Roman Catholic x 1

Anglican x 1

Head teacher representatives:

Primary Schools x 4

Secondary Schools x 4

Governors Representatives:

Primary Schools x 1

Secondary Schools x 1:

The task group will be supported by officers from the Council, including finance, planning, transport, admissions and school improvement and others as required.

Way of working

Task group members should form sub groups to look at a basket of issues, e.g. transport, finance, NOR.

Existing information should be used as much as possible

Each group should prepare work outside of the meetings and use the Task Group meetings to discuss findings, check progress against timeline and find solutions to any potential difficulties

Areas for the task group to consider:

To agree a set of principles which can then be applied for the drawing up of a draft model of schools provision prior to full consultation. It may be that more than one model can be designed for consultation.

The Task Group will look at the different dynamics of Herefordshire – market town, rural, city etc.

Teaching & Learning	Community	Transport	Commissioning provision	School Staff
Quality Achievement Narrowing the gap Tools to support eg VLE, ICT	Position in community and use of schools Council-led work on sustainable communities	Rationalisation Fuel costs Parental choice Rurality	Population Trends Parental preference Pupil views Access	Profile Recruitment/Retention Well-being
Sustainability	Finance	Services for pupils and the Community	Size of Schools	Diversity of Provision
Schools Environment	Revenue Balances Use of overall budgets and split	CYPD employed Partner services Co location of services	Optimum size Small schools definition / policy	Community, VA, Foundation, Trust Federations, Clusters Governance
Assets	Pupil Support & Development	Inclusion		
State of assets Capital investment	14 – 19 agenda Extended schools Early Years		The needs of children and young people- ECM as key principle	

The Task Group will have flexibility to consider any other issues as they arise.

Timeline

January 2009	Agree terms of reference, membership, outline work programme
February to April 2009	Identify and analyse available data and information to devise a menu of criteria
May 2009	Initial report containing draft criteria
May 2009 – July 2009	Officers develop strategic plan of provision using criteria, including options as appropriate
November 2009	Results put forward to the Cabinet for consideration and agree a strategy for formal consultation and change management

Documents – Considerations

Principles for 21st Century Education in Herefordshire 2007
Primary Strategy for Change
Building Schools for the Future expression of interest
Data books 1 and 2 for clusters
Housing new build plans / data
PCT birth rate data
Map.

Updated Version 2 – 2 February 2009

GLOSSARY OF TERMS AND ACRONYMS

- CPD – Continuing Professional Development
- CRB – Criminal Records Bureau – safeguarding checks carried out on all staff working with children and young people
- DCSF – Department for Children, Schools and Families
- HSTG – Herefordshire Schools Task Group
- INSET – In Service Training – for school staff
- MFL – Modern Foreign Languages – curriculum area
- NCSL – National College for School Leadership
- SENCO – Special Educational Needs Co-ordinator
- SIPS – School Improvement Partners

Falling rolls: refers to the decreasing number of children and young people attending our schools.

Surplus capacity: gives a percentage and actual figure for each school indicating the number of vacancies.

National Strategies: refers to curriculum, standards and initiatives set by central government that schools have to deliver.

HEREFORDSHIRE SCHOOLS TASK GROUP REPORT

RESPONSE SHEET

1. Cluster Working Recommendation (pages 6 and 7)				
	Strongly Agree	Agree	Disagree	Strongly Disagree
CWR1				
CWR2				
CWR3				
CWR4				
CWR5				
Comments:				

2. Considerations Regarding School Leadership (pages 8 and 9)				
	Strongly Agree	Agree	Disagree	Strongly Disagree
LR1				
LR2				
LR3				
LR4				
Comments:				

3. Considerations Regarding Sustainable Schools (page 10)

	Strongly Agree	Agree	Disagree	Strongly Disagree
3.1 Surplus Capacity				
A				
B				
C				
Comments:				

3. Considerations Regarding Sustainable Schools (page 11)

	Strongly Agree	Agree	Disagree	Strongly Disagree
3.2 Falling Rolls				
A				
B				
C				
Comments:				

3. Considerations Regarding Sustainable Schools (page11)

	Strongly Agree	Agree	Disagree	Strongly Disagree
3.3 Primary Pupil Numbers				
A				
B				
C				
Comments:				

3. Considerations Regarding Sustainable Schools (page 11)

	Strongly Agree	Agree	Disagree	Strongly Disagree
3.4 Secondary Pupil Numbers				
A				
B				
C				
Comments:				

4. Considerations Regarding Finance (page12)

	Strongly Agree	Agree	Disagree	Strongly Disagree
F1				
F2				
F3				
F4				
F5				
Comments:				

5. Considerations Regarding National Strategies (page 13)

Comments:

Please circle whether this is a:

Personal response or Professional response

If professional, please state profession.....

Responses to the consultation can be submitted through:

- the web consultation link www.herefordshire.gov.uk/consult
- via email to schoolstaskgroup@herefordshire.gov.uk
- via post to: F.Lennon Children & Young People's Directorate, PO BOX 185, Blackfriars Street, Hereford. HR4 9ZR

