

Appendix 1



St. Mary's RC High

Specialist Science and Applied Learning College



Proposal for working together within a hard federation

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Background

- Dilwyn School began the process of seeking a federation partner in December 2008. This was stopped at the request of CYPD in February 2009 and resumed in July 2009.
- St Marys RC High School expressed interest in such a relationship during the autumn of 2009 but were unable to pursue this as a result of personal circumstances.
- The parties met in February 2010 and both governing bodies have agreed in principle to a hard federation in April 2010.

Whilst some observers may not see this as an obviously attractive relationship to either party, there are clear long term benefits to families and communities in North Herefordshire as well as to both schools and the proposal has the backing of both the Catholic and Anglican churches.

Strengths

- The ethos of both schools have much in common – there is a clear spiritual and values based approach to education that Dilwyn School has sought as a clear prerequisite in any partnership arrangement (see Appendix 1)
- St Mary's is rated an outstanding school and has an established outreach programme to primary schools
- Dilwyn has very strong relationships within the school and much good practice. The recent SIAS report underlined the strong values and care based provision within the school.
- St Mary's has a strong desire to work with new partners and to extend a Christian based educational offering into North Herefordshire.
- Key members of St Mary's staff live near Dilwyn, which negates some of the assumed distance related drawbacks.
- Initial enthusiasm of both church authorities to investigate potential relationship
- Support for Dilwyn School and for this proposal from the local community underpins the probability of long term success.

Weaknesses

- Distance between the two schools raises issues which will have to be addressed during the lead in to the partnership.
- The high unit cost of education at Dilwyn will need to be addressed. Initial work conducted in the Dilwyn community indicates that significant inward funding from the community may assist in the initial 18 months, until pupil numbers rise.
- The difficulty of providing a full and varied curriculum at Dilwyn will be addressed. This is not considered a significant factor.
- Lack of significant primary school experience at St Mary's requires to be addressed anyway and is only expected to be a short term issue.
- Management of certain key matters such as safeguarding' of children at Dilwyn will need to be assured during the lead in period.
- The nervousness of the local community in supporting Dilwyn school because of the threat of closure will remain a short term issue until sufficient publicity is put in place to assure parents. The current Dilwyn governors have this in hand.

Opportunities

- To establish a unique 'church school' partnership which could act as a model of ecumenical co-operation for others to follow.
- To give presence to the Catholic Church in a part of Herefordshire that has no Catholic Church school
- To give access to St Mary's by amending the admissions policy to give some preference for those pupils at Dilwyn
- If above satisfied likely that roll at Dilwyn will increase in order to gain access for a desired high school
- To have a single administrative function to run both schools.
- Rationalise the staff provision particularly at Dilwyn and thereby cut unit cost.
- To ensue that the staff at Dilwyn can concentrate on the primary task of teaching and looking after the children

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- To provide a richness of experience for Dilwyn students by regular visits to St Mary's and vice versa.
- To provide further development opportunities for staff at both schools

Threats

- Local authority opposition to federation of Dilwyn with St Mary's needs to be addressed.
- Local authority not agreeing with proposed admission arrangements may weaken some of the early benefits
- Concern of local people about school being 'run' 19 miles away. This is not considered likely but will be fully addressed during the consultation period with parents.
- Dilwyn running costs may be higher than anticipated in 2010/11. This will be mitigated by community investment in the school, for which there is some local favour. This has been explored as part of alternative plans for running the school.

Strategic Risk Analysis

This is drawn from the 'Weaknesses' of the 'SWOT' analysis

Risk	Likelihood	Impact	Score
Distance between the schools	9	5	45
High Unit Cost of Dilwyn	9	9	81
Difficulty of providing full and varied curriculum	7	8	56
Lack of significant primary experience at St Mary'	7	5	35
'Safeguarding' management	6	9	54
Nervousness of local community about closure	8	5	40

The above analysis indicates medium risk ratings for all of the categories.

Risk mitigation

Distance between schools poses a risk for both pupils and teachers:

- St Mary's key staff are 'used to' travelling; one feeder primary school is in Ross-on-Wye.
- Integrate the communication systems - both email and telephone.
- Key St Mary's staff can be made available in an unforeseen emergency.
- Children transported by minibus for enhanced curricular opportunities.
- Opportunity for children to experience a different environment.

High Unit Cost of Dilwyn:

- Reduction of staffing costs as experienced higher paid staff retire/leave, starting autumn 2010.
- Admin functions to be brought 'onto' St Mary's with its benefits of finance manager, facilities manager and extended schools co-ordinator etc...
- Economies of scale should lead to lower costs.

Difficulty of providing a full and varied curriculum:

- Relationship with St Mary's and its 'Advanced Skills Teachers' will provide additional support in Literacy, Science and the environment/local history etc.
- Specialism staff can provide support in Maths and Technology
- Identified 'helper' primary school will provide targeted and rigorous analysis of current curricular provision and assessment of pupil progress.

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This will translate into an action plan, which they will assist in setting up and running.

Lack of significant primary experience at St Mary's:

- Key identified staff will participate in appropriate training.
- 'Helper' primary school will assist and advise key staff.
- Excellent willingness to learn and enthusiasm for the project of St Mary's staff.
- Support from Head of Wigmore federation offered with 'all through' curriculum.

Management of 'Safeguarding' of children at Dilwyn

- Ensure that all Dilwyn staff are appropriately trained at the correct level.
- Identified person(s) on Dilwyn site at all times.
- St Mary's Child Protection Officer and/or deputy to be available to Dilwyn in event of emergency.
- Work closely with LA to ensure that protocols are sufficiently robust.

Nervousness of local community about closure:

- Since consultation began no pupils have left school indicating satisfaction.
- Local community immensely supportive of school and its continuance.
- The prospect of a strong relationship, possible federation, with a well-regarded school would be reassuring and indicative of external confidence in its future.

The challenges must not be underestimated but there is a strong desire on both parties to make this work. Both church bodies have expressed full support for the development of a strong relationship between the schools.

At senior church levels there has been thought given to a possible joint Anglican/Roman Catholic school being formed via a trust. This would give the opportunity for Catholic children living in or near the area to have a primary school to attend as well as providing a unique and exciting school the first of its kind Herefordshire.

Issues relating to a 'Hard' Federation

It was not the intention of St Mary's to pursue a hard federation in the first instance. We are looking to support a Christian school that has strong local support and would enable us to have a Catholic presence in an area of Hereford from where we receive few pupils. There is a small Catholic Church in Weobley (3 miles).

In response to the '**federation matrix**', I will comment on the headline categories as appropriate if not previously mentioned in this document.

Vision and Benefit to Pupils and future Pupils in the Area

We believe that if the future of the school was secure, following its relationship with St Mary's, then the local community would support the school and its numbers would grow. There is potential in the village and the possibility of a 'route' into St Mary's as an established partner may well be an attractive possibility for prospective parents.

If the schools entered into a close working relationship then the resources from the high school, with its network of Advanced Skills teachers, specialist staff, close colleagues from primary schools (a further primary school has indicated a willingness to support the curricular provision) and the desire to do what is necessary makes it possible to cover ECM outcomes, ensure robust Safeguarding and give the pupils a much wider educational experience than is currently possible.

Community is a strength of both schools and this opportunity is unique. The different age ranges only serve to enrich the experience of all pupils.

Benefits in meeting the challenge of falling pupil numbers

We realise that this will not be an easy challenge. However it is hoped that the 'guaranteed' future of the school coupled with its developing relationship with another established faith based school would be an inducement to the parents of future children.

There are 53 children living in the Dilwyn catchment area of primary school age. The capacity of the school is 56.

Currently 28 of these attend either Weobley or Pembridge Primary Schools. Allowing for the proximity of local catchment area boundaries, it is possible in the future, provided that the number of children stays fairly constant (although overall in the county the number is diminishing) because of the desirability of the village as a place to live and bring up children that at least half of these would stay in Dilwyn. A flourishing and vibrant school would at least maintain the numbers attending

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from outside of the catchment area, particularly if there was a strong Catholic element to the school.

In these circumstances, I would anticipate a steady roll of between 40 and 50. Obviously this might impact on other schools in the area but in reality we are merely trying to ensure that the majority of children living in the Dilwyn area attend that school, with a few others from nearby who may or may not be Catholic, but want a strong Gospel values based education.

Schools attended by children living in Dilwyn catchment area	
School	Number of children
Dilwyn C of E Primary	19
Weobley Primary	14
Pembridge C of E Primary	14
Wigmore Primary	2
Ivington C of E Primary	2
Kingsland C of E Primary	1
Shobdon Primary	1
Total	53

School catchment areas Dilwyn C of E Primary draws from	
School	Number of children
Dilwyn C of E Primary	19
Leominster Infant/Junior	6
Weobley Primary	4
Ivington C of E Primary	1
Kington Primary	1
Total	31

Ethos

This is perhaps one of the most exciting aspects of the proposal, a first class opportunity to build a closer working relationship between two Faiths that share so

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much. Gospel value will be the cornerstone of the foundations of our relationship. We could produce a 'model' for others to follow.

Benefits in terms of teaching and learning

This is another exciting aspect of the proposed relationship. It is recognised at St Mary's that we do not have sufficient primary experience to make a significant contribution to the quality of teaching and learning on our own. However, as alluded to above, we are in negotiation with a well established and highly successful primary school who have key staff who would be willing to assist us on a consultancy basis. This would help in the delivery of the core curriculum and in the effective assessment of pupils to inform their future learning.

In addition the physical resources of the high school provide an additional space for expanding the learning possibilities for the Dilwyn pupils. The linking of St Mary's students to Dilwyn would not only enrich the experience of St Mary's children but provide increasing insight into the world of the secondary school.

At St Mary's, we have just embarked on a four year plan to change the way in which pupils learn. Drawn from robust research over many years by distinguished scholars, we are implementing strategies to build more resilient and better learners. There are to be three separate areas of focus, the 'Psychology of learning', Self Determination theory applied to curricular reform and 'The Optimistic Child'. We would be intending to use these programmes in the primary phase as that is where their efficacy may be greatest.

I believe that there are some fantastic opportunities here for all.

Outline draft plan for development of teaching and learning

Intention	Desired Outcome	Date completed	Resource Implications	Person Responsible
Appraisal of current provision by St Mary's and helper school	To produce a report on the current provision and action points for the future	31/10/10	5 days and cost of engaging 'helper' school £1000 (St Mary's budget)	Clive Lambert

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Work on enhanced curricular plan for KS2	Following report revised KS2 plan and schemes of work produced	31/01/11	Ongoing with key staff. Additional £500 for occasional cover	Head of 'helper school'
Begin link opportunities with St Mary's	Visits in place for KS2 in PE, Science and spiritual development	31/03/11	Transport costs in minibus. Driver already employed	Specialist staff Chris Park Peter Kyles
Assessment overview undertaken	Robust and informative Informal and formal assessment arrangements in place	31/03/11	Would form part of curriculum review.	Head of 'helper' school
Start enhanced curriculum for KS2	Enhanced curriculum at KS2 begins	01/09/11	£1000 new resources	Dilwyn head of teaching and learning
Work on Curricular plan for KS1	Following report revised KS1 plan and schemes of work produced	31/10/11	On going staff and £500 for supply cover as and when needed	Head of 'helper' school
Introduce Mindset and Brainology programme at KS2	Years 5 and 6 complete 'Mindset' sessions and have worked through 'Brainology' programme	31/07/11	Already paid for through 'Well-being' grant	Clive Lambert

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Staffing

I think that I may have covered this indirectly. For teachers it is the opportunity to work with a wider range of staff in sometimes-different phases of education. Our staff are used to travelling distances to other schools.

Administratively there are obvious advantages in rationalising the 'office functions' and in procurement of resources.

For 'Safeguarding', St Mary's can have a key role in supporting this process and by making key staff available at 'a moments notice' in an emergency.

Financial Viability

Although St Mary's and the local community recognise that they may have to invest in the short term, the long-term aim is sustainability for Dilwyn. Additional pupils only can secure this. St Mary's cannot and should not 'bail out' Dilwyn. Therefore there will be rigorous scrutiny and realistic budgeting. As indicated elsewhere we believe that it is possible to decrease the unit cost over time of Dilwyn as experienced staff retire. However the long-term solution must be retention and acquisition of pupils. We believe that this is possible for reasons explained above.

The current number on role is 31, we should be aiming for a target figure in excess of 40 consistently year on year for financial viability.

Figures from Dilwyn 3 year budget plan June 2009.

BUDGET HEADING	2008/09 (£) EL01	2009/10 (£) EL01	2010/11 (£) EL01	2011/12 (£) EL01
E01 - Teaching Staff	128,048	127,983	131,183	123,200
E02 - Supply Staff	6,835	6,460	6,622	6,788
E03 - Education Support Staff	16,559	11,438	11,724	12,017
E04 - Premises Staff	9,381	9,510	4,113	4,216
E05 - Admin & Clerical Staff	4,945	7,897	9,068	9,295
E07 - Cost of Other Staff	4,162	4,502	4,615	4,730
I01 - Initial Formula Allocation	147,114	133,690	139,718	146,272

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I have selected these elements as these carry the most significant cost @85% of total revenue.

E01- Teaching staff – over a three year period we would look to reduce that figure to the equivalent of 2 full time members and one part time of 0.4 max. We would need one experienced member of staff on the lowest point of the leadership scale or TLR 1, one main scale and a part time min scale.

1.0 f.t.e. Main Scale @£25,000 + 30% oncosts £32,500

0.4 f.t.e. Main Scale @£25,000 + 30% oncosts £13,000

1.0 f.t.e. TLR1 @ £35,00 + 30% oncosts £45,500

Total revised staffing cost **£91,000**

I realise that this is an optimistic figure but it is indicative of the savings that could be made.

For the remainder we would hope to reduce the cost of supply staff because of the availability of St Mary's staff to cover when necessary.

E04- The admin function would come into the St Mary's administration and would require only 'occasional' attention. The figure provided in the budget would be easily maintained if not reduced.

I01- This is a key figure and we would hope that additional pupils would be attending over a this period. Just 3 pupils would add @£10,000 to the income.

The above is unsustainable as a stand-alone budget, but as part of a federation it becomes more realistic. It is likely that in time the school would be become like a 'satellite' and therefore might be a 'cost centre' within the St Mary's overall budget.

It is recognised that initial investment is necessary to bring the school to a sustainable level but it is not intended that St Mary's acts a 'central bank' to Dilwyn.

Links across the community

I think that this has been covered elsewhere, but I would like to supplement this by highlighting the church community. At St Mary's, approximately 40% of children are non Catholic. This has never been a barrier to full participation of children. We have a lay chaplain so the possibility of joint activities in schools, the local church and St Mary's new chapel are legion.

Inspection Preparation and Support

Obvious overlaps and benefits from joint activities and a close working relationship. The recognised need to draw on further expertise has been previously mentioned.

School/Staff and Governance performance management

An obvious advantage of a range of experience available. Relationship of both governing bodies requires exploration.

Hard Federation: Governance

This has been mentioned elsewhere under 'opportunities'.

It may not be necessary to have a 'hard federation'. We believe much of the above can be achieved without it. However if the consultation with parents and the local community indicates agreement for Dilwyn to change its status in the future, for example as a joint Anglican/RC school or as an associate member of an Archdiocese of Cardiff, Hereford Catholic Education Trust then this would need close examination and may be dependant on the policies of the incoming government.

Opportunities here, but not for the faint hearted!!

The Church of England authorities have already given positive indication regarding the possibility of a joint C of E/RC school and the Catholic Archdiocese of Cardiff have given support to this initiative via the Archbishop and Director of Diocesan Education.

We would consider it prudent to undertake the activities described above as a matter of urgency, but ask the governing bodies of both schools to pursue the concept of a trust to create a joint school.

There is a Catholic benefactor watching our plans with interest.

One Leadership team

This would be an obvious move, but in view of the distance it would be necessary to have a leadership presence on the site most of the time.

The leadership structure is such to allow for flexibility but the draft proposal is as follows

Executive head teacher Clive Lambert (existing head of St Mary's)

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Deputy Executive head Chris Park (existing Assistant head and Director of Science specialism)

Chief Consultant (head of 'helper' primary school)

Director of Literacy and KS2 curricular development Sean Warde (current A.S.T. English and head of English at St Mary's)

TLR2 Curriculum development Dilwyn C of E Primary School

Safeguarding

This has been referred to under staffing. However this is a vital aspect of the running of the school and we would wish to work closely with the local authority to ensure that we have in place well understood and robust protocols'.

Teacher in charge of Safeguarding will be Michael Kennedy (Child Protection and Assistant head St Mary's)

Clive Lambert deputises in his absence.

Geographical Distance

The sites are 15 miles apart, approximately half an hour travelling time. This is not too inconvenient but it is hardly next-door either. Therefore we would be looking to use ICT solutions to overcome this. In addition, we would need to link the telephone systems in order that if a telephone is not answered at Dilwyn it comes to St Mary's and can be set to do so automatically as and when is necessary.

Proposed outline management plan

From September 2010:

- St Mary's to take over most of the day to day running of Dilwyn:
- All admin functions transferred to St Mary's
- Appointment of contact administrator for Dilwyn (Rather like triage)
- Current head of Dilwyn to remain as local 'head' responsible for teaching learning and pastoral matters in the first instance.

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- Part time teacher who retires between August and December 2010 to be replaced with a lower cost teacher on reduced hours
- Hours 'lost' from part time to be offset by current head teacher and outreach staff from St Mary's
- Reduced cost of Academic year 2010/11 not likely to be high but during this time further economies to be investigated
- Curriculum and other developments to be promoted from St Mary's and its associated consultants alongside Dilwyn staff
- Discussion between church authorities about possible change of status for Dilwyn school (V.A. or Trust) and change of admissions policy at St Mary's to allow preference to be given to Dilwyn pupils.

From September 2011

- New full time member of staff in post (following retirement in August 2010)
- Current headteacher to continue or be replaced by a teacher i/c

Costings

From the 3-year projection expenditure is not predicted to rise. Some of the allocations to premises and admin seem a little thin and therefore it is not reckoned that any real savings be made there.

However the teaching staff presents some opportunity. At best with 1 f.t.e. equivalent, a 0.3 f.t.e. and full time teacher i/c then costs could be reduced from the current @£130,00 to @£110,000.

The school operates 2 classes a KS1 and KS2. There is capacity each class for the roll to increase. The addition of just 3 children can realise in excess of £10,000.

It is to be hoped that the unit cost per child can be reduced from its present levels to one that is more acceptable to interested parties. This would be achieved by some of the means stated above.

Initial conclusion

This is an exciting challenge for both schools but the workload is not to be underestimated. However, there is a genuine long term advantage to both schools in this partnership and much can be overcome given the commitment of both governing bodies to make this work. Cost savings can be achieved although not significantly. The onus on both schools is to reduce the risks and show Dilwyn as an attractive, secure proposition to parents. There is much to commend it. The environment is beautiful; the intimate feel of the school is to be envied and will be attractive to new parents. Giving the school a more certain future will encourage more parents to send their children as there is capacity for this within the locality. The prospect of committed local Christians being able to send their children to a desired secondary school will be an attractive feature. It will be essential for the church authorities both Anglican and Roman Catholic to strongly support this proposal. For the churches it represents a unique opportunity to promote an exciting ecumenical venture. For the local authority an imaginative potential solution, which would reflect well on them. If they should choose to facilitate and support this arrangement

Postscript

A recent development has been the opening of discussion between the head of St Mary's and the head of the Wigmore federation, Andrew Shaw. He has clearly indicated a willingness to work with us in this process and offer his support. He has been working with schools around the country in different locations helping to set up federations. Andy would be a valuable partner in this process as he brings experience and local knowledge. He feels that this is a venture worth embarking on.

Appendix 1: Dilwyn: Principles, vision and values

Given the current issues with pupil numbers in Herefordshire, change is inevitable for the school. To manage this change successfully, the school and the wider community will need to be clear about the principles that are central to any negotiation concerning the school, the vision that the community has for the future of the school and the core values that are non negotiable in any proposed change. The following were agreed by the governors in December 2008:

1. We are committed to the continuation of state education for 4 to 11 year old children on the Dilwyn site.
2. We believe that this is crucial in preserving the nature of the Dilwyn community and the continued attractiveness of the village as a place to live.
3. We are committed to the continuation of Christian faith based education and will not support any proposal that endangers or dilutes this. We will actively seek change that strengthens our faith based ties.
4. We believe that a small village school with 30 to 50 pupils is both viable and attractive to parents.
5. We recognise that such education is expensive compared to urban primary models and will fight to maintain the financial supplements necessary to achieve it.
6. We recognise and accept that such a small school may not be able to maintain an appropriate management infrastructure (head teacher, school secretariat, bursar etc) and we will proactively explore any partnership or other options that do not conflict with our principles and values.
7. We accept that some of the non core curriculum roles for a school will be difficult for such a small school (extended schools, out of school clubs etc) and we will actively and creatively seek ways of developing such roles using community and other partners.

Dilwyn School Governors