

SUCCESSFUL, SUSTAINABLE, VIABLE SCHOOLS: INFANT & JUNIOR AMALGAMATION POLICY

Cabinet Member(s)	Councillor Susan O'Brien
Cabinet Portfolio(s)	Cabinet Member for Children, Families & Education
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Papers with report	Appendix 1 - Amalgamation Policy Appendix 2 - Consultation Responses

HEADLINES

Summary	Cabinet is asked to consider the outcome of the consultation undertaken on the draft 'Successful, Sustainable, Viable Schools: Infant & Junior Amalgamation Policy' and consider approving the Policy for implementation.
Putting our Residents First	This report supports the following Council objectives of: <i>Our People; Our Natural Environment; Our Built Environment; Our Heritage and Civic Pride; Strong financial management.</i>
Financial Cost	There are likely to be cost efficiency savings arising from any amalgamations of Infant and Junior schools within the Dedicated Schools Budget.
Relevant Select Committee	Children, Families and Education Select Committee
Wards	All

RECOMMENDATION

That Cabinet consider the responses to the consultation received on the draft Successful, Sustainable, Viable Schools: Infant & Junior Amalgamation Policy and approve this as Council policy.

Reasons for recommendation

To consider approval of the draft Infant and Junior School Amalgamation Policy, following consultation, as set out in Appendix 1. This report strengthens the previously agreed Cabinet decision in March 2009 to adopt a policy on amalgamation.

It is generally considered by the Local Authority (LA) that the amalgamation of linked Infant and Junior schools is a positive way to develop and progress school organisation. The LA recognises that the education landscape is ever-changing and this needs to be taken into account along with the circumstances of individual schools.

Hillingdon schools aim to provide a high-quality education offer to pupils and strive constantly to raise the standard of education. All schools are committed to working collaboratively, in partnership with all stakeholders and with a strong focus on developing extended service provision for their local communities.

Current financial pressures and increased costs impact all schools. Smaller schools can be disproportionately affected by budget pressures as they have a higher proportion of fixed central and staffing costs. As school rolls have declined in recent years from a high peak, some schools now have more than one class of under 25 pupils – the level that assures financial viability per class. Several schools in the Borough have one or more-year groups with a class less than the Published Admissions Number (PAN), and schools therefore need to be more flexible and resilient in staffing. Currently, most of the three and four form entry separate infant and junior schools have a total roll below 420, that of a full two form entry primary school.

The application of the policy would also seek to raise educational standards and strengthen outcomes for pupils by ensuring continuity and alignment of the curriculum across the Foundation Stage, Key Stage 1 and Key Stage 2.

As of September 2022, the Local Authority had 46 Primary / Infant / Junior maintained schools made up of 26 Primary schools and 20 Infant/Junior schools.

Democratic compliance / previous authority

This report strengthens the previously agreed Cabinet decision in March 2009 to adopt a policy on amalgamation.

SUPPORTING INFORMATION

Reasons for Amalgamation

The principal objectives of amalgamating Infant and Junior schools are to provide a continuous primary education across the Key Stages and provide a unified management structure within a single school ethos, making more effective and efficient use of resources. Primary schools have leadership and specialist teachers reflecting both the phases and subject specialisms. When a pair of schools consider the timing is right, the schools and LA will prepare detailed consultation for staff and parents on the issues for their proposed new combined school. Some potential benefits of amalgamation are detailed below.

Financial savings

Proposals for amalgamation would not be driven by the potential for financial savings, but they are a key consideration, since it is clear that in real terms, the budgets of schools will continue to be under great pressure. The LA is not encouraging redundancies but wants schools to be proactive in planning and responding to the opportunity of future staff vacancies, and to start to share some posts ahead of amalgamation. The potential for financial savings may come from sharing one headteacher and central office staff, revised leadership and staffing structures, economies of scale, a unified purchase point for goods and services and reduced building running costs. Most of the LA's all-through primary schools are 3FE and are successful at each key stage. Any efficiency savings achieved through amalgamations forms part of the ring-fenced Dedicated Schools Grant and are therefore re-distributed through the formula across all schools. These savings are not, therefore, retained by the Council. In terms of the amalgamated school, improved efficiency can offset any budget reductions in formulaic allocations, potentially resulting in an improved financial position for the school.

School organisation, management & resources

Continuity and progression of learning between the ages of 5 and 11: research shows that for some children, transitions in education (such as moving from nursery to primary school or from primary to secondary school) can be unsettling. Reducing the number of changes for children in a school system can strengthen continuity and progression for children and families in the primary phase, both in terms of the curriculum and pastoral experience. Amalgamation would remove the school transfer process at the end of Key Stage 1.

Consistency of approaches to inclusion and wellbeing: the continuity of schooling between Key Stages 1 and 2 can lead to a more cohesive approach to Special Educational Needs support and a faster diagnosis of need that children may have in the school environment. As there would be no transition from one school to another, pupils' need to adapt to new approaches and policies would be removed. It would provide the opportunity for strengthened 'tracking' of pupils' learning and achievement, with continuity of approaches to teaching and learning.

Efficient use of human and educational resources: an amalgamated primary school would ensure consistent leadership and management across Key Stages and encourage continuity between the Key Stages by adopting common schemes of work and approaches from Reception to Year 6. There would be one management system, one financial system, one governing body, one single point of communication for families, and efficiencies could be achieved through economies of scale and removal of duplicated services.

It should be noted that Infant and Junior schools are generally not eligible to apply for Department for Education related leadership schemes such as Teaching School Hubs, due to their small size and infrastructure. Primary schools therefore receive more support than Infant and Junior schools, which strengthens the argument for the benefit of shared access to resources.

There could be more efficient and effective use of resources, especially accommodation, for example, when numbers fluctuate across the Infant and Junior phases.

Headteacher / staff / governor recruitment

The general difficulty of recruiting headteachers is often heightened when separate Infant and Junior schools advertise for a new headteacher, as salaries tend to be lower than for combined primary schools and career progression opportunities arguably more limited. This also applies to teaching staff in general. The LA has found it increasingly difficult to recruit to headteacher posts, leading to unnecessarily long interim arrangements due to lack of interest and / or quality of applicants. Similar problems are experienced in recruiting to governing bodies where a significant number of vacancies exist.

Parental / family involvement

More effective relationships develop with parents/carers and schools with continuity in education across the Primary phase. Research shows that parental support is a major contributor to children's achievement. Amalgamation provides opportunities for effective and longer-term relationships with children, parents/carers and teachers by building on relationships that may have already been established in nursery/reception. For younger children, the presence of older children can also provide aspirational role models and mentoring support.

Co-ordination: amalgamation could provide opportunities for co-ordinated staff training days, open evenings, and school start and finish times, which would assist families in dropping off and picking up children who are in different Key Stages.

End of Key Stage 1 Assessments

2023 is the last year of the KS1 statutory assessments (SATS). Schools will now be measured from Reception Baseline Assessments to end of Key Stage 2 to track Primary pupils from Reception to Year 6. Infant and Junior Schools will find it difficult to be in alignment with the DfE data outcome requirements due to this gap for end of Year 2 and the start of Year 3.

Curriculum delivery

Unified leadership and management of teaching: a unified organisational structure should enable planning for the whole primary phase Curriculum Key Stages, as well as providing greater flexibility across, and between, the Key Stages. This benefits more able pupils to extend their learning and also those who need more catch-up or support in some subjects – that the hard split is softened and there will be continuity and progression of teaching and learning.

Workforce issues

An enhanced range of staff expertise: teachers and other staff would have access to the whole primary curriculum. This could support and inform whole school planning, assessment, pastoral systems, etc., and provide opportunities for wider staff development and experience across the full primary phase.

School Ethos

A single vision and consistent ethos, to benefit pupils, staff and parents/carers:

Whilst separate schools may have their own identity and ethos, amalgamation can provide an opportunity to create a whole new school ethos taking the best parts and practices from the separate schools.

Educational standards

It is possible to find statistical evidence to show either increased or decreased standards following any major change at schools. It is widely accepted that the key to success following any major organisational change, whether in schools or any other organisation, is how such a change is effectively managed and the quality and commitment of the staff.

The impact on education improvement for those schools in Hillingdon that have amalgamated in the past substantiates the evidence about combined schools. Prior to the four amalgamations in 2021-22 of Lady Bankes Infant & Nursery and Junior Schools and Oak Farm Infant & Nursery and Junior Schools, the previous set of schools to amalgamate were the Breakspear Infant and Nursery School and Breakspear Junior School, which closed on 31 August 2013 and amalgamated to become The Breakspear School.

Reasons for not amalgamating

The Local Authority recognises that there are some arguments against amalgamation and significant anxiety about the change and transition impacting on pupils and staff. Some of the most common reasons are:

- Educational benefits might, under some circumstances, be achieved by more effective communication and working together of staff and governing bodies in smaller, separate schools. It is noted that there are two cases where the junior school has joined a MAT limit options for those infant schools.
- A hard federation or both schools joining the same MAT could achieve similar benefits.
- The larger size of a combined school could raise issues about the changed role of the headteacher who, as a consequence of the size of the school, might be seen as more remote to parents/carers.
- There could be disruption to pupils. However, the aim would be to achieve amalgamation with as little disruption as possible to pupils. The merging of the schools could be managed over time by the senior staff and governing body of the school. Generally it is envisaged that most teachers would continue to teach the year groups as before and Infant and Junior pupils would each continue to be taught in the buildings built and adapted for them, and the playgrounds.
- Site specific issues such as separate school buildings, which might make it difficult for children and staff to move easily between buildings for lessons or assemblies.

Governance

A single governing body can provide strategic governance and vision for all primary key stages and be accountable for outcomes across the school phases.

Financial Implications

- The amalgamation of Infant and Junior schools should result in savings being achieved through a rationalisation of resources and through economies of scale by combining operations and streamlining the procurement of services.
- Combined schools sharing the same site are able to maximise the efficiency of their resources.
- A combined school staffing structure removes duplication and support functions can be consolidated across the single school. This has a positive impact on the budget.
- In situations where pupil numbers are changing, discussions with a combined single school on a site has potential to offer more flexibility and opportunity to improve the accommodation and site usage.
- The amalgamation of the schools will allow for a pooling of asset related revenue budgets, and the ability to manage property costs over both buildings, which will support a better maintenance regime.

Responsibility of the Local Authority

The Local Authority has the power to close community schools or to require them to amalgamate but this policy is not intending to force amalgamation unless circumstances change, and the benefits would be a stronger, improved, viable school. The local authority would like to work collaboratively with the schools and seek formal approval of the Cabinet Member if no objections are received, on a case by case basis.

Amalgamation involves making changes to the organisation of schools. This is governed by statutory processes that are detailed in [DfE Guidance: Opening and closing maintained schools – Statutory guidance for proposers and decision-makers November 2019 and Making significant changes \('prescribed alterations'\) to maintained schools -Statutory guidance for proposers and decision-makers.](#)

RESIDENT BENEFIT & CONSULTATION

Consultation on the draft Policy

The consultation policy document was available from Wednesday 18th May 2022 to Friday 17th June 2022 on the consultation page of the Hillingdon Council website. This included a brief outline of the proposed changes, the full proposal and an online questionnaire to obtain feedback. The questionnaire sought support or otherwise from the key sections of the proposed Policy document as attached in Appendix 1.

The consultation was shared with all 99 schools within Hillingdon, including academies and maintained schools via the weekly communication from education@hillingdon.gov.uk. From this request to Headteachers, SLT, staff and Governors (700 governors from maintained schools) to

take this opportunity to review and comment on the policy, the LA received the following responses:

Consultation Responses (set out in full in Appendix 2)

Appendix 2 details the full responses received by each section of the policy. This report seeks to address the responses, in terms of the broader rationale for amalgamation.

In total 60 responses were received during the consultation period and 1 respondent did not complete any of the questions. Whilst the consultation was sent to all schools, Cabinet should note that the overwhelming majority of the respondents were from Infant and Junior Schools.

Most of these responses were from staff, governors and parents who referred to their own school very positively, believing at the current time there were not sufficient concerns to make a change that would be beneficial. A few noted the school had experienced difficulties on one or more of the key issues in the past but had recovered; educational achievements, budget deficit, problems recruiting.

Responses are summarised below in terms of support or otherwise for the key sections of the policy:

Support for the key sections of the policy	Yes (support)	No (do not support)	Don't Know	Other	Subtotal	No response	Grand Total
Introduction	18	34	3	2	57	3	60
The Educational Case for Amalgamation	15	39	1	4	59	1	60
Governance and Leadership	21	31	5	2	59	1	60
Parents Views	16	34	6	3	59	1	60
Financial Implications	18	33	6	2	59	1	60
The Policy	19	32	5	3	59	1	60
Implementation	20	32	5	2	59	1	60

Officers have taken into consideration all comments made as part of the consultation and have reviewed the policy accordingly.

Conclusion

Whilst a majority of respondents did not support the key sections of the Policy, this again seemed to be due to staff, governors and parents believing that currently there were not sufficient concerns to make a change that would be beneficial to their individual school.

Amalgamation provides opportunities both to achieve greater integration across the key stages to enhance the continuity of education and better value for money and resources spent in classrooms. The well-being of all children and staff would be a major consideration throughout any process of amalgamation.

With regard to size, the Local Authority considers that schools amalgamated up to 4 forms of entry in size are all manageable and are not too large. As of September 2022, there will be 24

primary schools of 3 forms of entry in Hillingdon (plus 1 primary school of 5 form of entry which is reducing to 4 form entry in 2023).

On balance, the Local Authority considers that the overall benefits of amalgamation outweigh the reasons for maintaining the status quo. Therefore, where circumstances permit, any opportunity for amalgamating Infant and Junior schools should be vigorously pursued.

Amalgamation provides an opportunity to attract high quality headteachers and teaching staff to Hillingdon and provide more effective governance.

Further consultation required

The LA would like to re-iterate that any decision to pursue a school amalgamation would only be made on a case-by-case basis and would be the first step in the statutory consultation process following any of the triggers being met as per the policy for making prescribed alterations to schools. This step would be followed by detailed consultation with all key stakeholders, the publication of firm proposals (if appropriate) and a subsequent decision to be taken by the Council. The key stakeholders to be consulted about any specific school amalgamation proposals would include the school governing bodies, staff, trade unions, parents, Ward Councillors, neighbouring LAs and any other person or body likely to be affected by such proposals.

CORPORATE CONSIDERATIONS

Corporate Finance

As stated in the financial implications above, there are likely to be cost efficiency savings arising from amalgamations of Infant and Junior schools, provided that management processes change to reflect the changed operational environment of the amalgamated school. These savings may either be for the benefit of the amalgamated school or for schools in general, depending on any consequential impact on the local schools funding formula, as all such savings would be retained within the ring-fenced schools budget funded by the Dedicated Schools Grant.

In addition, it is expected that the individual school's accumulated balances and reserves would be merged, providing additional financial flexibility to the amalgamated school.

However, the benefit of any efficiencies and flexibility that might be generated through amalgamation will vary depending on the particular circumstances of the schools in question, and these benefits and costs will be assessed as part of the evaluation of each amalgamation proposal that is investigated under the proposed policy.

Legal

The recommendation contained in this report only establishes a Council policy to consider amalgamating Infant and Junior schools. Any subsequent decision to consider amalgamating specific Infant and Junior schools would need to follow the statutory legal process introduced by the Education and Inspections Act 2006 for making prescribed alterations to schools. There is no definitive single legal process for bringing two schools together in an amalgamation. Therefore, as well as considering whether any schools should be brought together, any consultation would

also need to explore which of three available options is the best way to make a prescribed change. The three options are:

- Close an Infant school and expand the Junior school to the full primary age range;
- Close a Junior school and expand the Infant school to the full primary age range; and
- Close both schools and open a new school for the full primary age range.

Infrastructure / Asset Management

Amalgamation of infants and junior schools into one organisation under the banner of a 'primary school' could lead to asset reorganisation and possibly identify unwanted or underused parts of school sites. For example, where there is currently duplication of services or uses, following amalgamation there may be vacant rooms or parts of buildings which could be used by other Council services or let to outside bodies such as children's nurseries to derive revenue income. The amalgamation of school resources on to 'one' site will provide opportunities for economies of scale and better management of physical and personnel operations in the buildings. It may also be an opportunity to retain the best parts of the buildings and, through careful planning, release the not 'fit for purpose' parts

BACKGROUND PAPERS

[Cabinet report – March 2009](#)