

| ISLE OF ANGLESEY COUNTY COUNCIL | |
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| Report to: | Executive Committee |
| Date: | July 14th, 2014 |
| Subject: | Take advantage of opportunities to modernise the educational provision |
| Portfolio Member(s) : | Councillor Ieuan Williams |
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| Local Members: | |

| A – Recommendation(s) and Reason(s) | |
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| 1 | <p>Introduction</p> <p>1.1 The Isle of Anglesey County Council has commenced an ambitious service improvement plan to transform the network of schools that service the county so that there is a range of schools that are fit for purpose for the 21st century. They will possess the facilities needed to present the modern curriculum effectively and to support the improvement of educational standards and development opportunities for all pupils and staff.</p> <ul style="list-style-type: none"> • The programme includes extensive investment over a period of a number of years in improving school facilities and a programme to rationalise the number and structure of schools so that they are all educationally viable for the long term. • This will inevitably mean that some schools will need to close and other schools will need to merge in the interest of providing the best possible educational opportunities for Anglesey's children. • Anglesey Authority has a robust modernisation strategy. The plan's Band A has already been presented and accepted by the WG. <p>1.2 Even so circumstances can arise in other areas that are not in Band A that will need to be taken advantage of and due consideration given to satisfying needs when opportunities arise.</p> <p>1.3 This was discussed in the County Primary Head Teachers' Business Meeting in January 2014 and the consensus was positively in favour of taking advantage of any opportunities that arise naturally in order to move the modernisation programme forward.</p> |
| 2 | <p>Leadership in Small Primary Schools</p> <p>2.1 In September 2007, the Scottish Government published a report following research that was commissioned in order to identify the leadership challenges faced by Headteachers of small school. In remembering that Scotland has a large number of small schools, this report is relevant to education on Anglesey.</p> |

2.2 The research's main findings include the following :

- The nature of being a headteacher who teaches in a small school means maintaining two jobs; teaching and leading a school. The main concern expressed by the headteachers of small schools was that they were trying to maintain both jobs, with a lack of time; this was noted as a considerable obstacle .
- The problems that are innate in the duality of the role of the headteacher who also teaches has deteriorated with recent educational developments, particularly the local management of schools - management and administrative tasks have taken over at the expense of the role of leading the curriculum and raising standards.
- Teaching vertical groups is burdensome.
- Headteachers who teach have little time to meditate and think profoundly about the needs of their work that varies from curricular matters, administration, budgeting, and leadership.
- The burden of inspection is extremely heavy in small schools where there are only two or three teachers to be observed during an inspection.
- Leadership in small schools is a substantial challenge within a context of having to lead multiple innovative developments with a few staff and other resources.

2.3 This is confirmed further in Estyn's Thematic report: School Size and Educational Effectiveness – December 2013. It is noted

'A common feature in successful schools is good leadership. Every school, whatever its size, is able to perform well where the quality of leadership is good or excellent. When the general performance of schools is adequate or unsatisfactory, there are weaknesses in the quality of leadership nearly every time.' (page 3)

'Leadership and processes to improve quality are usually better developed in large primary schools. In small primary schools, many head teachers have a considerable teaching responsibility that limits the time that they can put aside to lead and manage and they have less opportunities to evaluate standards and motivate improvements.' (page. 4)

2.4 In order to improve the leadership capacity across schools a procedure of school-to-school support was established, in co-operation with the Recovery Board.

A paper was presented in a Headteachers' meeting confirming the aim to set up a self-improving system where schools take the general leadership responsibility for raising standards. It was noted that the principle of school-to-school support and co-operation was crucial if outcomes for learners and raising each school's performance was going to be improved. It was also confirmed that the school-to-school support procedure would

- o provide a structure for sharing good practice, promote a spirit of corporate learning and a feeling of unity in aiming for excellence in relation to pupils' standards and experiences;
- o ensure that there is an ethos of co-operation and sharing good practice

- underpinning the work of each leader in the Education system;
- o give school leaders the opportunity on every level to act as system leaders;
- o concentrate on schools' development needs, based on strong self-evaluation of performance data, teaching and learning and pupils' work;
- o ensure that the system promotes co-operation on a number of different levels e.g. Governors, Head Teacher, SMT and individual teachers, namely developing leadership capacity.

3 Headteacher Posts

- 3.1 On January 1, 2014, there were 16 Anglesey primary school headteachers aged over 55 and 20 of them over 50 years of age. This shows a high age profile amongst the authority's headteachers.
- 3.2 The numbers who apply for headteacher posts are low, not only here on Anglesey but across the whole of Wales. There is a need to take advantage of opportunities that can arise when a headteacher leaves a post, to consider different/additional methods of ensuring effective leadership for a school e.g. by making a temporary appointment, knowing that the post of permanent headteacher is to be considered as part of the modernisation/school merger programme; or by co-operating with a neighbouring school and placing that school's headteacher responsible for both schools as part of a package that would develop both establishments.
- 3.3 A procedure of two schools working together through a 'Management Partnership' is also an opportunity to develop leadership capacity and specialisms across other layers of school staff. That would be useful in developing people for the future, within the schools and across the service in the county.

4 Developments in other authorities

- 4.1 During discussions regarding school modernisation with members of the Recovery Board it was strongly suggested, for several reasons, that it would be beneficial to learn from what was being implemented in South-West England, and specifically in Devon.
- 4.2 At the beginning of April 2014, four primary head teachers and one LA officer visited Devon to see their arrangements for federalising schools. It was an interesting visit and there was emphasis among the school representatives from Devon that co-operation arrangements, that were formalised, had led to raising standards. That is confirmed by the positive outcomes of Ofsted inspections.
- 4.3 Headteachers' perceptions of the visit are noted in appendix 1 and the officer's observations are in appendix 2. However, considerable discussion has taken place during and since the visit and this is reflected in the contents of the appendices.

4.4 During the visit mention was heard of 'Management Partnership', namely a procedure that is being implemented in Devon as a step before moving to formal federations of schools. There are many features of this procedure that could be useful as an interim step during the modernisation programme locally, in order to maintain standards and develop leadership capacity. The term 'Management Partnership' refers to a partnership between schools that decide to share one headteacher, who has responsibility for the schools' strategic leadership. Under this arrangement, the individual schools continue to be separate schools and keep their own governing bodies.

4.5 The advantages of such an arrangement include the following.

- The procedure ensures that the schools in question have an experienced Headteacher who is able to lead the collaboration.
- Such a procedure can attract an experienced Headteacher where an individual school loses the service of an individual and fails to recruit.
- This can allow sufficient time for a Headteacher to lead staff to ensure continuous improvements and face the challenges of attaining and maintaining high standards.
- It offers an opportunity for staff to work together with other teachers/assistants who carry out similar work that can lead to sharing experiences and good practice.
- It offers an opportunity to use specialisms across the schools strengthening the number of 'specialists' who are available.
- It is also a way of developing leaders and prospective future leaders by giving teachers an opportunity to claim whole-school and cross-school responsibilities e.g. a teacher having responsibility for the day-to-day running of a site but under the guidance of an experienced Headteacher. This kind of arrangement could contribute extensively to developing a generation of leaders for our schools.

5 **Link with the County's modernisation programme**

5.1 The relevance of the lessons learnt from the visit to the County's modernisation programme are outlined below.

5.2 The Council wishes to see education of the highest standard being provided for all children and young people on the Island. In order to safeguard this the council notes the intention to modernise the school infrastructure with the aim to increase the leadership capacity and ensure sector-leading schools in every community.

5.3 The School Modernisation Strategy acknowledges the challenge attached to leading and managing a school and notes that this has increased substantially in recent years and that the expectations are likely to increase for the future.

5.4 Developing a 'Management Partnership' has had significant influence on leadership capacity in Devon. The reports emanating from a visit to Devon [appendices 1 and 2] suggest that this could be achieved locally if the principle was implemented carefully.

5.5 On a practical level, establishing a 'Management Partnership' is foreseen in the kind of situations listed below.

- When a Headteacher's post is likely to become empty, or becomes empty. Officers will expect the Governing Body, particularly in the smaller schools, to give real consideration to setting up a 'Management Partnership' in the first place.
- The Modernisation Strategy notes "Consider the long term viability of schools where the number of pupils is 75 or less". Where the number of school pupils is less than 75 for three years and forecasts show that it will not change, detailed information regarding the cost of maintaining the establishment [staffing, capitation, maintenance and improving the building] should be provided to the Governing Body of that school with a view that the establishment will not continue as a school standing on its own, if it is decided that the school will remain open. The first discussions should be with those schools that are furthest from maintaining an establishment of 75 pupils.
- In situations where school performance is low over a period, and the school is unable to improve, the LA will discuss setting up a 'Management Partnership' with that school's Governing Body.
- When a Governing Body sees value in promoting co-operation with another school the LA will promote collaboration through discussion and consultation, so that decisions are made openly and transparently.

6 Recommendations

- Ensure that every governing body understands the Authority's intentions if opportunities arise to set up a 'Management Partnership'.
- Create possible models of collaboration between schools where there is a likelihood of a Headteacher leaving the post or where there are less than 75 pupils, or where the Governing Body expresses a desire to work with another school.
- Ensure that there is a specific training programme in place for providing the appropriate support for headteachers to feel confident to be responsible for a 'Management Partnership'.

B – What other options did you consider and what were your reasons for refusing them and/or choosing this option?

Not relevant

C – For what reason is this a decision for the Executive Committee?

Support is needed for the principle of establishing a 'Management Partnership' as a result of the link with the School Modernisation Strategy.

Elected Members' support in their role as school Governors is crucial.

CH – Is this decision consistent with the policy approved by the full Council?

Yes

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| D – Is this decision within the budget approved by the Council? |
| Not relevant |

| DD – With whom did you consult? comments? | | What were their |
|--|--|------------------------|
| 1 | Chief Executive / Senior Leadership Team (SLT) (mandatory) | |
| 2 | Finance / Section 151 (mandatory) | |
| 3 | Legal / Monitoring Officer (mandatory) | |
| 4 | Human Resources (HR) | |
| 5 | Property | |
| 6 | Information Communication Technology (ICT) | |
| 7 | Scrutiny | |
| 8 | Local Members | |
| 9 | Any external bodies/ other (s) | |

| E – Risks and any mitigation steps (if relevant) | | |
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| 1 | Economic | |
| 2 | Anti-poverty | |
| 3 | Crime and Disorder | |
| 4 | Environmental | |
| 5 | Equalities | |
| 6 | Result Agreements | |
| 7 | Other | |

| F - Attachments: |
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| Appendix 1: Head Teacher's report following the Devon visit. Appendix 2: Officer's Report following the Devon visit. |

| FF – Background papers (please contact the Report's author for any further information): |
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Devon visit – 01.04.2014 – Four Primary Headteachers' Impressions and Findings

In April 2014 four primary headteachers visited the Okehampton area, in Devon, to see school federalisation arrangements being implemented in that Authority. It is noted that federation regulations are different between England and Wales, and the visit's purpose was to be able to share experience with governors, headteachers and other staff who had a part in school collaboration and federation arrangements.

The 'Federation' programme has begun in Devon since 2006, but it appears to us that it has caught on more since 2009.

What is federation?

Bringing a number of schools together to act under one Governing Body. This needs to be formalised and supported with appropriate documents. No definite single model had been adopted – variations were dependent upon the needs of schools.

Reasons for federation:

Amongst the reasons noted, were:

- Safeguarding schools in communities
- Federation does not reduce empty places nor in itself save money – although there are possible financial advantages (e.g. make better use of human and other resources)
- Maintain / raise standards / develop excellent schools
- Create opportunities to develop staff and future leaders
- Promote support and collaboration between schools
- Give the best opportunities to pupils and staff to succeed. Keeping small schools working by themselves is less likely of achieving this, according to the findings of those with whom discussions were held.

Establishing a procedure

The headteachers had been prominent as drivers for the model. The LA had encouraged, but not compelled in any case. The LA had arranged consultation meetings, given factual information e.g. the cost of teaching an individual pupil, building maintenance costs, pupil number forecasts.

It appears that implementing 'Management Partnership' is an initial step – when circumstances so required or when an opportunity arose. In such circumstances schools retain their individual governing bodies but both schools agree that the headteacher of one school becomes responsible for the other also. This gives them an opportunity to see whether they are going to develop the arrangement to be a federation within about a year. If this does not work, they can withdraw and find another partner.

LA officers confirmed that it was possible to undo federation arrangements and that this needed to be said from the beginning. It was emphasised that it was important to exercise caution for everyone to have an opportunity to see the advantages.

Other elements that were important was listening to the community – ‘*consult, consult, consult*’ – and continue to listen – not at the beginning only! Tell the parents exactly what is happening from the beginning – trial and be willing to change if things do not work; Keep every school’s character – every one is different in nature in line with parental and community wishes – this makes it easier to sell the idea. Hold a Forum for parents also – one for each school at the beginning, in order to keep their independence, but need had soon become dulled in some cases.

Governors

It was important that they received information beforehand, before beginning the process - a ‘Federation Open Week’ was held where information was imparted in one case. The essence of federation was establishing one governing body, with representation from each school. The practice of making an audit of possible governor skills and then an election had led to a number of “supportive” governors not continuing. The governors are much more strategic. Subcommittee arrangements (3-4 in each group) – e.g. finance, teaching and learning challenge group, reporting on each school and comparing performances are usual. An example of a full Body meeting every month – formal structure – every meeting discussing every school, and visiting each school often, in order to come to know everyone. Identifying people / area specialists – e.g. finance, Health and Safety from amongst individual governors have highlighted their contributions.

Early days / Difficulties

Selling the structure – going about it in the correct way is essential. Primary head teachers were not happy, or they were uncertain to begin with – but seeing the problems in front of them meant that something had to be done. The 1st year can be a difficult one – it can take up to two years for a Governing Body to develop into a body for the federation rather than individual governors representing their own schools. The governors noted that a vision was needed over a period of about five to seven years – and that meant not rushing, but taking advantage of opportunities to implement arrangements.

Various Models

School size was not a significant feature –

1. Secondary + Primary – Okehampton
 - The headteacher emphasised that this was not being seen as the secondary taking over – although there were more advantages for the primary. The secondary school headteacher was looking at the 3 – 18 year old child, and he wanted to be part of the child’s education from the beginning. Secondary and primary teachers were spending time in each other’s schools. ‘Can’t be a takeover from secondary’
 - Secondary school specialisms e.g. Health and Safety –were available to help the primary.
2. Primary only – e.g. two primary schools (both around 80 – 90 pupils), another example of 4 schools, one of 400 pupils and one federation of 5 schools.

- Some mentioned keeping schools in the rural communities, whilst others believed that headteachers who taught were not able to give the best to the children. Amongst the primary schools also there was a combination of administrative /business officers.

How do schools get their partner?

- Desire, zest and the need to ensure success decide.
- Not through the LA's selection
- Geographical – examples 15-20 minutes from each other
- A need for leaders with the same inclination
- Every full Governing Body in agreement
- Trust and relationship between schools essential – federation is easier if you wish to work with other schools
- Schools allowed to join or leave
- Some schools have refused and then cannot find a partner when they realize that they must do something. In joining at the beginning, they can make a better contribution.

It is interesting to note that schools belong to various collaboration levels – e.g. catchment, family, CDP – but working together in a federation is a 'harder', more formal layer, with more definite expectations and accountability for outcomes and standards.

Staff

It was not customary to dismiss anyone – this happened naturally as people retired etc and staffing levels on the whole has remained. New staff were expected to sign a contract to work in any one of the schools, and current staff were invited to do so. Use of specialisms / sharing subject co-ordinators across the schools, with this developing people. The headteachers observed lessons in other schools. It was mentioned that staff wanted to teach in schools that succeeded – easier to attract good staff, that staff enjoyed working together – staff development was prominent and also important, staff were seeing the possibility of career development.

There were examples also of sharing visits / sports teams.

Staffing Structure

The staffing structures varied, reflecting varied situations.

- Executive Heads: making the decisions – particular management skills, Supervising the whole federation's work.
- Co-heads: equal status head teachers of various schools in a federation.
- Business Managers: responsibility for buildings / personnel matters / finance / health and safety / welfare
- Head of School: in larger schools (leadership pay point) – responsible for the site when the "head teacher only visits occasionally" (once a week perhaps).

- Head of Teaching and Learning: responsibility for the teaching and learning (TLR), day to day leader when the head teacher is not on the site but for, half the time / or 0.4.
- ** Parents need to know who was on the site continuously in order to know to whom to turn
- Administrative assistant across schools

Finance

Business officer arranging the budgets in parallel with every school's budget standing independently. There was variety in how far different federations acted e.g. one federation had decided to have joint operational budgets whilst another undid that in order to show the budgets individually for the schools - Single budget/individual budget/shared budget/separating budget – *'can't have one school subsidising another'* The arrangements offered joint opportunities to make savings e.g. develop a website across the federation, a pool of supply teachers between federation. There was a need for financial discipline and to beware of making decisions that could appear to be easy ones.

Significant quotes from the visit

- **Why federation? Why not?**
- **Education is not a business – education = people.**
- ***Consult, consult, consult***
- ***Big enough to succeed, small enough to care***
- ***The same expectations in every school, it's only the children that are different***
- ***School don't compete for pupils any more***
- ***This is a process, every day is a new opportunity and a new challenge***

Management Partnership – officer’s comments on the relevance of the Devon Visit to the education system in Anglesey.

Introduction

At the beginning of April 2014, four primary headteachers and one officer from the LA visited Devon in south west England to see their arrangements for federating schools. It was an interesting visit and school representatives with whom there were discussion emphasised that formalising co-operation arrangements led to raising standards. That is being confirmed by the positive results of Ofsted inspections. There are regulations for federating schools in Wales and there are a number of examples of federations at work in Wales, with one of them here in Anglesey between Ysgol Dwyran and Ysgol Niwbwrch.

It is possible that federation is one consideration in implementing a modernisation programme for educational provision here in Anglesey, but it is noted that it does not contribute to reducing empty places, it does not ensure financial savings of itself, and it does not reduce expenditure needs on buildings.

During the visit there was mention of a “Management Partnership” arrangement, namely a procedure that is being implemented in Devon as a step before moving towards the formal federating of schools. There were many features of this procedure that could be useful as an interim step during the Anglesey schools modernisation programme, in order to maintain standards, before the modernisation programme comes into effect in a particular area.

The term “Management Partnership” refers to a partnership between schools that decide to share one headteacher, who has responsibility for the schools’ strategic leadership. Although the individual schools continue to be separate schools and keep their own governing bodies.

In Devon, it is the schools that decide, according to their need and desire, to move to this step. The LA officers are available to give advice and information, and suggest the advantages of acting in this way. The schools create a written statement of what has been agreed, financial contribution and expectation as regards head teacher time on any site etc. What is important is that LA officers and the schools’ Governing Bodies agree that this is the way forward in the specific circumstances that can arise.

The need in a school to have an experienced headteacher, who is able to lead strongly, arises for a variety of reasons. Such an arrangement can attract an experienced headteacher where a school loses an individual’s services and fails to recruit. Such an arrangement can allow a headteacher adequate time to lead staff to ensure continuous improvements, and face the challenges of attaining and maintaining high standards.

There are advantages also for other staff in schools. Being able to co-operate with teachers/assistants who do similar work widens experiences. Releasing specialisms to be available across the schools strengthens the number of specialists who are available. Development of leaders and prospective leaders to develop whole-school and cross-school responsibilities is a significant feature that could contribute extensively to developing a generation of leaders for our schools.

There would be a need to be totally realistic as regards some matters. There is a need to show how costs are shared, e.g. as regards headteacher time, there is a need to show how the schools will be dealt with fairly as regards staff time if they nurture their specialism across more than one school. There will be a need to develop people's capacity to undertake more leadership roles, and the conditions for them to do so. There will be a need to agree on the timing of practical matters e.g. two schools cannot decide independently when to hold an event where a headteacher is needed on the site to hold it. There will be a need to take advantage of opportunities to reduce some features e.g. create policies and documents together, adopt (as far as possible) similar working practices. There will be a need to consider the working relationship of the two Governing Bodies so that the headteacher does not continuously duplicate work. There will be a need to give full information to parents in order to maintain their confidence in the provision.

This arrangement offers one means of action during the modernisation period that should be considered as a step in order to attract and maintain a high degree of leadership of schools. This will also provide a means of developing leadership capacity within schools and across schools in a period when there is a need to develop the next generation of school leaders.

Next step:

Develop this paper into a guideline paper that would:

1. Give clear guidance to Governing Bodies on this arrangement, the advantages along with implementation costs.
2. Share that guideline when giving information/consulting with Governing Bodies regarding a possible procedure for intervention in various circumstances.
3. Aim to have a "Management Partnership" procedure available formally for Anglesey schools during the 2014-2015 school years.