



FORMAL PROPOSAL

CONSULTATION DOCUMENT

The Governors of Elmwood & Penrose Federation and the IEB of Avalon School propose to form a Hard Federation of the three schools with effect from 1 September 2021.

CONSULTATION PERIOD: The consultation period will start on 11 May 2021 and will close at Midday on 28 June 2021.

Due to COVID restrictions and ensuring safety of all, it is proposed that any additional materials will be provided electronically and meetings will be held virtually rather than face to face.

Consultation Circulation List:

- Parents and Carers of children on roll at Elmwood & Penrose Federation and Avalon School.
 - All staff at all the schools and Trade Unions
 - The Governors and Clerks to Governors of both schools
 - Julian Wooster, Director of Children's Services Somerset County Council
 - Secretary of State for Education
 - Regional Schools Commissioner
 - Local educational establishments that share services, including Robert Blake Science College, Brookside Academy, The Bridge School, Sedgemoor, Bridgwater & Taunton College and Strode College.
 - Notice of consultation will also be published on school noticeboards.
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This formal proposal as published on 11 May 2021. It follows consideration of the proposal by both Governing Bodies who have independently agreed to publish at meetings held on:

Elmwood & Penrose Federation Governing Body – 10 May 2021

Avalon School IEB – 21 April 2021

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Brief summary of the consultation paper

This section provides a brief overview of the Formal Consultation Document regarding the proposal being considered by Governors, for Elmwood & Penrose Federation and Avalon School to share an Executive Headteacher and Governing Board from September 2021.

This section contains the main points of the proposal, but you are encouraged to read the full Consultation document which explains in detail what is being proposed.

What is a Federation?

A Federation is the formal term used in certain situations where two or more schools work more closely together to achieve the best for their pupils.

What would be different if Elmwood & Penrose Federation and Avalon Schools federated?

The main difference would be that each school would have one shared Executive Headteacher, who would be Mrs Helen Farnell. The two existing Boards of Governors would be merged to provide one Governing Board containing representatives from each school.

Each school would retain its own identity.

Each school would have its own budget and would be inspected separately by OFSTED. Admission arrangements would remain the same and would be managed through the consultation process via Somerset County Council. Children would be taught in their own school with opportunities for joint activities and shared resources that would benefit all children. We can enjoy the benefits of school to school support to improve provision and outcomes in our local area which will benefit our children, their families and our community.

Is it possible to undo a Federation?

It is intended that a Federation between the schools would be permanent, and would bring stability, certainty and commitment to each school.

It is always the aim that a federation is a long-term commitment. There is a process for withdrawal, but the governing boards would not be publishing this proposal without having done considerable research and had extensive discussions on the suitability of this structure for our schools.

What would be the benefits of Federating?

It would enable each school to share their resources, such as teaching expertise and facilities, which would help improve the performance of each school. It would enable more joint activities between pupils and more cost effective joint training for staff. There would be opportunities for joint purchasing and procurement. There would also be opportunities for sharing expertise in admin, finance, premises and human resources to make work more economical, efficient and consistent.

Bringing schools together would also allow for stronger Governance with relevant expertise and experience to provide both support and challenge to leaders across the schools.

It would provide more professional development opportunities for staff. Equally important, it would help the schools to build a stronger foundation to cope with the challenges that lie ahead as national policy for education continues to change.

Bringing schools together in a Federation, would allow a focus on school improvement and bringing together expertise, which could also address school failure. The Government is keen for schools to work together in partnership. There is evidence that this type of collaboration drives improved standards and student outcomes.

What happens next?

We want to hear your thoughts and views on the proposed Federation. At the end of the document a confidential response form is provided to share your thoughts.

We really want and need to know what you think, so please share your thoughts with us.

What changes will take place for staff?

Staff will continue to be employed by and retain their contract with their existing school. The benefit of collaboration in this way is to share services and there will be a number of staff for example in admin, finance, premises and IT, who will be offered split contracts and may have different terms linked to their job descriptions to enable them to work across sites. Staff will also be offered opportunities to work in the different schools should these occur. This type of collaboration between schools allows a network of support for staff in different areas of the school to work together which brings new ideas and sharing of expertise and resources.

Introduction

One of the three key roles for all school Governing Boards is to set the strategic direction for the schools for which they are responsible.

The current national drive to create a self-improving school system is based on the principle that clusters of schools will work with, learn from and support one another to develop local solutions to the challenges they might face. This document outlines the proposal for Polden Bower School (Currently Elmwood & Penrose Federation) and Avalon School to join together under a Federation.

A period of consultation has been agreed for stakeholders to comment on this proposal.

Current Education Climate

In the current educational climate we are experiencing:

- schools working collaboratively to focus on localised leadership and self-improvement.
- stronger Governance offering support and challenge to leaders across the school by contributing their own expertise and experiences to drive improvements
- increased accountability leading to pressure on Governing Boards to provide effective support and challenge, in order to maintain and improve educational standards while ensuring support for senior leaders in dealing with finance, business and estate issues.
- an expanding evidence base which is driven by the Government to bring schools together which in turn, drives standards and student outcomes.
- schools and small multi-academy trusts being brought together to form bigger collaborations of schools as the Government academy programme develops.
- schools reflecting on how to deal with real cuts in funding and rising costs while delivering improving outcomes for children and young people.
- a growing national problem of recruitment and retention of quality and experienced leaders in the specialist sector.

What is a Federation?

Under the Education Act 2002, schools and Local Authorities can propose that two or more schools can join together to create a Federation. A Federation is a group of two or more schools with a single Governing Board. It is a way of bringing schools closer together. The schools then combine their Governing Boards into just one Governing Board for the Federation. This allows the federating schools to pool resources.

The creation and membership of a Federation is not just about structural change. It is also about a different mindset where the Governors and school leaders share a commitment to improving the outcomes and life chances for all children across the Federation, as opposed to just a single school, through a school-led system of raising standards and driving improvements. (NCTL. The Governance of Federations, 2014)

What stays the same?

- Each school will keep its own identity and name. It is not a merger of schools.
- Children and young people will continue to be taught in their own school.
- Each school will continue to receive its own budget. The new Governing Board will determine how this can be most effectively used within each school.
- Each school will be inspected separately by OFSTED.
- Admission arrangements will not change and will continue to be managed by Somerset County Council through the consultation process.
- Existing members of staff will remain employed by their current schools.

What will change?

- The Federation will need to have its own name as it is a separate legally constituted corporate body.
- The newly appointed Governing Board with responsibility will oversee the strategic work for the new Federation.
Further details of the composition of the Governing Board are set out later in this document.
- There will be a single Executive Headteacher. It is proposed that Mrs Helen Farnell is appointed.
- Elmwood & Penrose Federation are moving to the new Polden Bower School and at this point (September 2021) will be known as Polden Bower School.

Is the decision to Federate irreversible?

It is possible for schools to withdraw from a Federation and Governing Boards must follow a prescribed process, set out in The Schools Governance (federations) (England) Regulations 2012.

Why are the Governing Boards considering Federation?

The Executive Headteacher and other leaders from the Elmwood & Penrose Federation have been providing support for Avalon School over the last 12-18 months. Federation would bring stability, consistency and continuity to the schools.

The schools have a shared vision to achieve educational excellence and to support all children and young people to achieve their full potential. Each Governing Board is committed to improving opportunities and services for every child through the provision of best value. They share an ambition to drive up standards and be a sustainable, high performing local presence. They also hold a shared belief in the importance of continually developing and retaining high quality staff.

Through collaboration, the schools have already experienced some of the benefits that joint working can bring for the pupils, these opportunities will be improved and extended by federating.

Federation brings a better opportunity to secure strong, strategic leadership. Bringing both schools under one leadership team would ensure that the best practice from each school can be applied.

There is now a growing body of evidence nationally that when groups of schools such as those in Federations work together, they are successful and have led to improved outcomes for children and better professional opportunities for staff.

Some of the benefits of Federation

For pupils:

- they will benefit from a greater variety of teaching expertise, resources, facilities and additional specialist provision which will be shared across both schools.
- their own school will continue, but with access to a larger range of opportunities.
- they will have increased opportunities to work with pupils from other schools, such as residentials, Duke of Edinburgh award and through employability and workplace activities.
- they will have confidence that strong and proven successful leadership of the schools is being strengthened for the benefit of both schools and their communities.

- in times of curriculum/ school change, a strong Federation will be much better placed to manage those changes thus enabling pupils to receive maximum benefit.

For staff:

- there will be increased opportunities to share best practice, develop a professional network.
- there will be the opportunity to develop mutual support across schools.
- an enhanced CPD – Continuing Professional Development programme will develop staff skills.
- there will be a wider range of career opportunities.
- staff will have access to a greater range of resources.

Federation wide:

- this will make a more sustainable model with schools remaining at the heart of their community.
- there will be improved opportunities for the recruitment and retention of outstanding staff.
- high quality teaching and learning can be maintained and developed across the federation.
- there will be the opportunity to develop a collaborative culture supported by Federation leadership to manage and sustain future change.
- the ability to procure services and resources will bring cost savings and efficient use of the budget for each school.
- It will be easier to recruit and retain highly skilled and experienced staff.

Admissions

Admissions to each school will continue to be under the current arrangements. Each school will continue to manage the admissions through the SEND consultation process which is managed by Somerset County Council.

Governance

After federating, there will be a single Governing board.

On the federation date, the Governing Board of the schools becoming federated are dissolved and the Governing Board of the Federation is incorporated. This involves the individual Governing Board discharging their former responsibilities. Any land and property held by the schools' Governing Board before federation is transferred to the federated Governing Board. All rights and liabilities that existed immediately before the federation date are also transferred to the federation Governing Board.

Governing Boards are expected to focus on providing strategic leadership, holding the leaders to account, overseeing the financial performance of the school and making sure the school's money is well spent.

This is a demanding task for which all Governors need to have, or develop, relevant and appropriate skills.

All potential Governors of the new single body will complete a skills audit. Governors will be appointed on the basis they have the skills to contribute to effective governance and the success of the schools.

It is proposed that the new Governing Board is made up of 14 Governors. This should allow us to ensure a balance of representation from both school communities.

Constitution of the Governing Body (minimum of seven members)

Category of Governor	Who appoints them?	Number
Executive Headteacher	Ex Officio	1
Heads of School	Associate Governors	3
Elected Parent Governor	Elected by all parents/carers of children and young people on roll of the schools.	2
Staff Governor	Elected by all staff employed at the schools	2
Local Authority Governor	Proposed by Somerset County Council	2
Co-opted Governor	Appointed by Governing Body according to skills	4
Associate Governor	Appointed by Governing Body according to skills	As Appropriate

The Clerk to the Federation's newly incorporated Governing Body will organise the elections of staff and parent Governors.

Leadership and staff

We propose to appoint Mrs Helen Farnell as Executive Headteacher of the Federation. Helen is the Executive Headteacher of the Elmwood & Penrose Federation and has acted as Executive Headteacher for Avalon School since April 2020.

Staff will remain working within the school to which they are appointed, although it may be possible for staff to work across either school if this is thought to be beneficial to them and the pupils.

Newly appointed staff (including those promoted to jobs from within) will be offered contracts to the Federation, rather than to one school, so that they can be deployed in both or either school.

It is our intention that there will continue to be Heads of School who will focus on the day to day leadership and management at the schools.

Mrs Kat Burgess and Mr Andrew Laurence will be Co-Heads of School at Elmwood & Penrose Federation. The Head of School for Avalon School will be appointed in due course.

What next?

How to respond to the consultation

The Governing Boards of each school would really like to hear your views. If you have any comments please let the Governing Boards know by the deadline, which is Midday on 28 June 2021

A copy of this proposal will be available for inspection at each school at any time throughout the consultation period.

You can also share your comments by completing the attached response form or writing a letter. You can also email comments if you wish to Nicola Almond or Rosalind Dempsey at NAlmond@educ.somerset.gov.uk or rosalind@avalonsch.uk

In both cases, please send your reply to:

Mr Clive Padgett – Chair of the IEB at Avalon School

c/o Rosalind Dempsey, Avalon School office, Brooks Road, Street BA16 0PS

Mr David Purcell – Chair of Governors at Elmwood & Penrose Federation

c/o Nicola Almond, Elmwood School, Hamp Avenue, Bridgwater TA6 6AP

Please mark your envelope: FEDERATION RESPONSE

The Chair of Governors of The Elmwood & Penrose Federation and The Chair of the IEB of Avalon School will hold virtual meetings with both staff and families for each school respectively, these meeting dates will be shared with relevant parties in due course. These meetings will allow parents and staff to ask questions, hear the views of the Governing Boards and to discuss the proposals in more detail.

**All responses will be considered by the Governing Boards meeting together.
They will then have separate meetings to decide whether to proceed or not.
We aim to reach a decision by the end of 9 July 2021.**

Frequently Asked Questions (FAQs)

Will the name of the schools change?	No. Each school will keep its own name but there will be a separate overarching name for the Federation and a single Governing Body (which is to be decided)
Will school uniforms and logos change?	No. Each school will keep its current dress code, logo and unique identity
Who will be the Executive Headteacher for the Federation?	Our proposal is for the Federation to appoint Mrs Helen Farnell as Executive Headteacher.
Will there be any change to admission arrangements?	No. Admissions will continue to be managed through the SEND consultation process which is managed by the Local Authority
Will school start and finish times change?	No
Will pupils be registered to the Federation or a single school?	Pupils will be on roll at their individual school within the Federation
Will the schools share a budget?	No. Each school will continue to receive its own funding, manage separate budgets and keep separate records and accounts. However, there may be occasions when the two schools share costs or combine purchasing if this means that they will be able to get better value for money to continue to ensure good opportunities for children.
Will the Federation be inspected by OFSTED?	No. Each school will have separate OFSTED inspections and be graded separately, as they are now. However, we can ask OFSTED to inspect schools at the same time to form a rounded picture of the work of the federation – in particular to assess the impact of the partnership.
Will there be any changes in the conditions of service for staff?	No, there will be no changes and staff will continue to be employed on the same conditions of service as defined in Somerset County Council contracts. This means that, for example, all employment rights and pension arrangements will stay as they are now. New staff and where there are promotions from within, will be offered split/ joint contracts which will enable them to be deployed effectively across the schools.
Will staff work across both schools in the Federation?	Existing members of staff will continue to work in the school they presently do. There may be opportunities for staff to work across the schools. We hope that staff will make use of CPD opportunities and sharing good practice to improve the pupil outcomes.
Will the schools have the same INSET/ Training days?	Yes, wherever possible the schools will plan the same INSET days. This gives the opportunity to bring the schools together for training and CPD opportunities, a benefit of the federation.
Do schools in a Federation share a Governing Board?	Yes, the Governing Board of Elmwood & Penrose Federation and the IEB of Avalon School will dissolve and form a new Governing board to oversee the new Federation.

Will one school take the lead over the other?	No, the schools in the Federation will collaborate and work together as equal partners. As far as possible we will try to ensure that the single Governing Body will have equal representation from each of the two schools through Parent and staff representation.
Is there any research on the impact of schools collaborating in this way?	There is a national picture which suggests schools coming together are stronger and enable a focus on school-wide improvement. OFSTED have reported that where schools work together and share leadership, standards have been raised and there have been improvements in both children's behaviour and achievement. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/467855/DFE-RR466 - _School_improvement_effective_school_partnerships.pdf
If Federation of the schools goes ahead, when would this happen?	If a decision is made to federate, the proposal is this would take effect from 1 September 2021.
What success criteria will be used for the Federation?	The success will be determined around stability and the continued improvement of both schools.
Will there be a reduction in costs for both schools?	Neither the Local Authority or the Governors or either school, are looking for a reduction in costs. This process is designed to benefit pupils and staff, ensuring the continued success and stability of both schools.
If the Federation goes ahead, what work will be done between now and September 2021?	The consultation process will enable the two Governing Bodies to determine the outcome. The Governing Bodies will carry out skills audit for all current Governors which will determine who remains on the single Board and any potential new Governors. There will be no change to the daily experiences of the children and young people.
Can a Federation be dissolved?	Yes. The Governing Body can choose to end a Federation if it is believed that it is no longer in the best interests of the pupils and stakeholders. This is not an action that would be taken lightly or without due diligence and consultation. The governing bodies have entered into these discussions and formulated this proposal on the basis that this is in the best interests of the schools.
What are the long term plans for the schools after Federation?	There are no current plans for academisation, however, The current policy of the Department for Education and the Regional Schools Commissioner is to support academisation on a multi-school basis. Whilst we are focusing on developing a hard federation, future national policy may dictate a variation in the Federation to a Multi-Academy Trust and ultimately an expansion of the schools. This will be kept under review and school leaders and the Governing Board will keep abreast with local, regional and national policy.

Confidential Response Form

In response to the consultation document outlining the proposal to form a Federation between Elmwood & Penrose Federation and Avalon School from 1 September 2021. All responses will be treated in the strictest of confidence, however we will not be able to take anonymous comments into consideration.

Responses must be received by midday on 28 June 2021

Name:

Address (optional):

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I am a (please select)

<input type="checkbox"/>	Parent/Carer of a child at Polden Bower School (currently Elmwood & Penrose Federation)
<input type="checkbox"/>	Parent/Carer of a child at Avalon School
<input type="checkbox"/>	Member of staff at Polden Bower School (currently Elmwood & Penrose Federation)
<input type="checkbox"/>	Member of staff at Avalon School
<input type="checkbox"/>	Other Interested party (please specify)

Your response (please select)

<input type="checkbox"/>	I support the proposal	<input type="checkbox"/>	I do not support the proposal	<input type="checkbox"/>	I am not sure
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Please give your views on the next page:

