

## **Cabinet**

**14 November 2018**

### **Review of School Provision - Future options for Wellfield School as part of the Education Review in County Durham**



**KEY DECISION:CYPS/02/18**

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#### **Report of Corporate Management Team**

**Margaret Whellans, Corporate Director of Children and Young People's Services**

**John Hewitt, Corporate Director of Resources**

**Councillor Olwyn Gunn, Portfolio Holder for Children and Young People's Services**

**Councillor Alan Napier, Portfolio Holder for Finance**

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#### **Purpose of the Report**

- 1 This report provides Cabinet with details of the work that has been undertaken as part of the review of education provision in County Durham which was agreed by Cabinet on 15 November 2017.
- 2 The report makes recommendations in relation to Wellfield School, impacting on Tanfield School, Stanley also.

#### **Background**

- 3 Previous reports have outlined the significant financial difficulties being experienced by a number of schools across the county as a result of reductions in admission numbers and to a lesser extent school funding formula changes, which has necessitated some schools setting of deficit budgets – mainly secondary schools.
- 4 This is a particular concern because schools that have an inadequate OFSTED judgement have been required to become sponsored academies and if / when they do, any deficit balance that they are carrying becomes a cost to the local authority and is not transferred to the sponsoring academy.
- 5 The impact on schools from real terms cuts in schools funding is huge and representations have been made to the Secretary of State, both as part of the National Funding Formula consultation and more recently through concerns raised with regards to the impact of Government policy and funding decisions on rural schools provision.

- 6 It is estimated that if funding rates had kept pace with inflation since the 2009-10 financial year, the amount available for the mainstream school funding formula in the current financial year would be 15% higher than the actual amount. For Durham this is equivalent to £46 million, or around £120,000 per primary school and £600,000 per secondary school. Funding at this level could provide for around 3 extra teaching staff in a primary school and around 15 extra teaching staff in a secondary school.
- 7 Members will also be aware that legislation prevents the Council from making contributions to or financially supporting individual schools. Funding for schools is provided primarily through the Dedicated Schools Grant.
- 8 In November 2017, Cabinet considered a report which outlined the need for a strategy for school organisation. This involved reviewing educational provision in each local area across the county.
- 9 In terms of prioritising the planned reviews, the two schools with the most significant financial challenges / financial viability concerns were Wellfield School in Wingate and Wolsingham School and Sixth Form in Wolsingham. These schools and the schools in the surrounding pupil place planning areas were agreed as falling into the first phase of the strategic review of schools provision, together with a review of primary school provision in the Horden area.
- 10 In terms of Wellfield, the review of educational provision encompassed the full 0-16 age range in the area served by Wellfield School, to provide a platform for developing a long-term, financially sustainable, model for all children in the area. As well as Wellfield, there are Primary schools in Wingate. Nearby, there are also primary schools in Thornley, Wheatley Hill, Hutton Henry and Hesleden. After consideration, not all of these schools have been prioritised in the initial stage of the review and so do not feature in the final proposals or recommendations in this report. In summary, the reason for this that all are near capacity and, in a pupil-led funding formula, there is no imminent risk to their financial viability. All these schools are judged 'Good' or 'Outstanding' by Ofsted.

## **Overview – Review of schools provision**

- 11 The Cabinet report of November 2017 identified a process for considering options for enhanced and sustainable educational provision in each locality and an indicative timeframe for these reviews to be completed. Reviews were to be undertaken in stages, with initial discussion with all partners to consider options for enhanced provision in local areas. This could involve discussions with schools, the local community, and partners / key stakeholders about possible options for re-organisation including:
  - (a) do nothing;
  - (b) establishing a model of Federated schools;
  - (c) amalgamation of schools;
  - (d) creation of Multi-Academy Trusts;
  - (e) establishment of through schools;

- (f) closure / new-build re-organisation options.
- 12 At the completion of each stage, Cabinet were to receive update reports and consider recommendations before moving into wider consultation with the community or other stakeholders, as appropriate or if required by legislation, on the recommended solutions.
- 13 However, as the Review proceeded it was not possible to follow the exact process or indicative timeframe described in the November report. Options developed in discussion with schools took longer than anticipated; where conversations with schools required governor involvement and approval, this was often difficult to secure quickly, and was often built around existing governor meetings, already calendared. Consequently, meetings that had not formed part of the original planned sequence of events necessarily extended it. In short, the fact that this process did not have a precedent and was largely dependent on schools' compliance with local authority requests, rather than a formal mandate, made quicker progress difficult. The result was that the suggested milestones were not met and update reports were not presented to cabinet as originally envisaged.
- 14 The review of existing provision in the three initial review areas (Weardale, Wingate and Horden) has now been completed and proposals have been developed for Cabinet consideration. Separate reports have been prepared outlining the findings, the options appraisal and making recommendations for each area. The reviews have involved:
- (a) A cross service working group, chaired by the Head of Education, to ensure all relevant factors, including legal, financial and HR implications are covered by the review of options available;
  - (b) Meetings with school leadership teams – including Head Teachers and Chairs of Governors of the schools in financial difficulty and other schools in that locality – to discuss financial projections, options available etc.;
  - (c) Meetings with elected members and MPs as appropriate to share key information and provide advice on the options available in terms of a sustainable educational provision in each locality and progress updates with the reviews in their areas;
  - (d) Discussions with the Regional Schools Commissioner's (RSC) office, which is part of the Department for Education.

### **Wellfield and Tanfield Schools – context**

- 15 Wellfield School is a community school in Wingate serving mainly deprived local wards / communities and is ringed by academies where the admissions arrangements are likely to continue to disadvantage some pupils with particular educational and social needs. The school was modernised, through the Building Schools for the Future programme (a decision which pre-dated the fall in pupil numbers over recent years), with capital expenditure

amounting to £8.8 million. The school currently has capacity for 1,154 pupils.

- 16 In September 2012 the school failed an OFSTED Inspection and was judged as Inadequate. Over a period of 18 months the DfE could not find a sponsor academy and therefore the school remained a maintained school during this period. A new head teacher was appointed in September 2012 and a re-inspection of the school in March 2014 judged the school as a Good. There are no education standards concerns with the school now and pupil numbers have risen as the reputation of the school continues to be restored, though this has come at a cost.
- 17 Wellfield School has no retained balances and up until 31 March 2018 had an in year and accumulating deficit balance, with pupil numbers falling significantly after the inspection of 2012, and then rising steadily in recent years. The number of pupils funded through the formula fell from 1,147 in 2005/06, to 487 in 2015/16, before increasing to 653 in 2018/19.
- 18 Pupil projections would indicate that the school will be able to set an in-year surplus budget in 2019/20 having been able to set a balanced in-year budget in 2018/19 for the first time in a number of years. The school is however unlikely to ever be in a position where it can afford to repay the deficit in full without this having an impact on the quality of provision of education. Therefore the current position is not sustainable.
- 19 The current financial forecasts for Wellfield School are:

	<b>2017-18</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>
Number on roll (Y7-Y11)	567	653	743	807
Deficit brought forward (£)	(2,738,000)	(3,393,000)	(3,393,000)	(3,190,000)
In-year use of balance (£)	(655,000)	-	203,000	409,000
Deficit carried forward (£)	(3,393,000)	(3,393,000)	(3,190,000)	(2,781,000)

- 20 The financial forecasts for 2019/20 are for a £203,000 in-year surplus. The forecasts are inclusive of the additional staff required to provide for the additional pupils that were expected to be admitted in September 2018. The in-year surplus in 2020/21 does not include any additional staff that may be needed to cope with increased pupil numbers expected in September 2019, so the in-year surplus in that year is likely to be smaller than the figure shown here.
- 21 A summary of contextual information for Wellfield School and the primary schools in the Wellfield area is shown in the tables below, with a breakdown by school included in Appendix 2. The primary schools that are included are:
- Wingate
  - Thornley
  - Wheatley Hill
  - Hutton Henry

- Hesleden
- St. Mary's RCVA, Wingate
- St. Godric's RCVA, Thornley

<b>Capacity &amp; occupancy numbers (pupils &amp; students)</b>	<b>Primary schools</b>	<b>Wellfield School</b>	<b>Total</b>
Number on roll ( as 28 September 2018)			
Reception to Y 11	1,086	743	1,829
Total Capacity of the Schools	1,159	1,154	2,313
Spare capacity	73	411	484
% Spare Capacity	6.3%	35.6%	20.9%
% Places Filled	93.7%	64.4%	79.1%

<b>Age Range – Numbers on Roll (at 28 Sept. 2018)</b>	<b>Primary schools</b>	<b>Wellfield School</b>	<b>Total</b>
Reception	140	-	140
Year 1	162	-	162
Year 2	146	-	146
Year 3	161	-	161
Year 4	154	-	154
Year 5	155	-	155
Year 6	142	-	142
Year 7	-	188	188
Year 8	-	157	157
Year 9	-	167	167
Year 10	-	129	129
Year 11	-	102	102
<b>Total on Roll</b>	<b>1,060</b>	<b>743</b>	<b>1,803</b>

<b>Funding Levels 2018-19 (£)</b>	<b>Primary schools</b>	<b>Wellfield School</b>	<b>Total</b>
Formula funding 2018-19	4,862,000	3,705,000	8,567,000
Pupil Premium funding 2018-19	498,000	289,000	787,000

<b>Surplus / (Deficit) Balances held and Planned Use of Balances in 2018-19 (£)</b>	<b>Primary schools</b>	<b>Wellfield School</b>	<b>Net Position</b>

<b>Surplus / (Deficit) Balances held and Planned Use of Balances in 2018-19 (£)</b>	<b>Primary schools</b>	<b>Wellfield School</b>	<b>Net Position</b>
Retained Balance at 31 March 2018	402,000	3,393,000	3,795,000
Forecast use of balances in 2018-19	(25,000)	-	(25,000)
Forecast retained balance at 31 March 2019	376,000	3,393,000	3,769,000

<b>Accumulated Surplus / (Deficit) balances 2013-14 to 2017-18 (£)</b>	<b>Primary schools</b>	<b>Wellfield School</b>	<b>Net Position</b>
31 March 2013	312,000	(157,000)	155,000
Contribution to or (drawn down) in 2013-14	288,000	(546,000)	(258,000)
31 March 2014	602,000	(703,000)	(101,000)
Contribution to or (drawn down) in 2014-15	19,000	(684,000)	(665,000)
31 March 2015	620,000	(1,387,000)	(767,000)
Contribution to or (draw down) in 2015-16	33,000	(746,000)	(713,000)
31 March 2016	650,000	(2,133,000)	(1,483,000)
Contribution to or (draw down) in 2016-17	(250,000)	(605,000)	(855,000)
31 March 2017	404,000	(2,738,000)	(2,334,000)
Contribution to or (draw down) in 2017-18	(4,000)	(655,000)	(659,000)
<b>31 March 2018</b>	<b>402,000</b>	<b>(3,393,000)</b>	<b>(2,991,000)</b>

<b>Employee numbers</b>	<b>Primary schools</b>	<b>Wellfield School</b>	<b>Total</b>
Teaching	66	50	116
Support	144	53	197
Total	210	103	313

22 The figures for protected characteristics in the table below are from the May 2018 Schools Census, which is the most recent data available that provides this detail. The total numbers on roll are different to the 28 September figures used in other context tables. Details are not recorded for all pupils.

<b>Protected characteristics</b>	<b>Primary schools</b>	<b>Wellfield School</b>	<b>Total</b>
Disability	5	6	11-
Gender reassignment	-	-	-
Marriage and civil partnership	-	-	-
Pregnancy and maternity	-	-	-

<b>Protected characteristics</b>		<b>Primary schools</b>	<b>Wellfield School</b>	<b>Total</b>
Race	Any Other Asian Background	2	-	2
	Any Other Black Background	2	-	2
	any Other Ethnic group	1	1	2
	Any Other Mixed Background	5	1	6
	Black African	1	-	1
	Chinese	-	1	1
	Gypsy/Roma	3	2	5
	Other Gypsy/Roma	-	2	2
	Indian	1	2	3
	Roma	-	1	1
	White and Asian	4	4	8
	White and Black African	3	1	4
	White and Black Caribbean	1	-	1
	White Any other background	11	7	18
	White British	1,120	631	1,751
	White Irish	1	-	1
	White Traveller of Irish Heritage	2	-	2
Not recorded	3	-	3	
Religion or belief - data not held				
Sex	Male	598	582	1,180
	Female	313	341	654
Sexual orientation		-	-	-

- 23 The review of education provision in the Wingate area overlapped with the process to amalgamate Wingate Infant and Junior School, in line with similar actions taken across County Durham in recent years to bring separate Infant and Junior schools together, where appropriate, to form primary schools. The reason for this is so children can benefit from primary education in one school rather than changing schools at age 7, which frequently impacts positively on standards. An amalgamation often leads to a larger and more viable school being established rather than two small schools, and usually results in a budget saving, as only one head teacher is required.
- 24 The action to amalgamate Wingate Infant and Junior School, began before the countywide review of education commenced.
- 25 Tanfield School is a relatively small secondary school in Tanfield which is near to Stanley. The school had the opportunity to be amalgamated with

Greencroft Community School and Stanley School of Technology to become part of what is now North Durham Academy when that school was formed as a new-build through the Building Schools for the Future (BSF) programme in 2011. However the Governing Body expressed the strong desire that the school should remain a separate school at that time.

- 26 Pupil numbers have declined in recent years, but have now begun to increase, due to pressure on places at Consett Academy, and in response to the exercise of parental preference.
- 27 This school has previously had approval to set a deficit budget for 2017-18, 2018-19 and 2019-20, on the basis of the school achieving an in-year surplus from 2019-20, which would allow it to start to reduce its deficit.
- 28 The updated budget plan forecasts for Tanfield School are:

	2017-18	2018-19	2019-20	2020-21
Number on roll (Y7 - Y11)		609	674	719
Deficit brought forward (£)	(125,000)	(487,000)	(583,000)	(459,000)
In-year use of balance (£)	(362,000)	(96,000)	123,000	323,000
Deficit carried forward (£)	(487,000)	(583,000)	(459,000)	(137,000)

- 29 The school is forecasting significant increases in pupil numbers over the next three years and that it will be able to set an in-year surplus budget in 2019/20 and start to pay down the accumulated deficits it will have built up by that point. The forecasts are inclusive of the additional staff required to provide for the additional pupils that are forecast to be admitted in September 2018. The in-year surplus in 2020/21 does not include any additional staff that may be needed to cope with increased pupil numbers in September 2019, so the in-year surplus in that year is likely to be smaller than the figure shown here.
- 30 The school is changing from specialising in Design & Technology to Humanities and is currently restructuring its staffing accordingly and to prepare for a further increase in pupils for 2019-20, which would be reflected in admissions this September.
- 31 Summary information for both Wellfield and Tanfield is provided below:

<b>Capacity &amp; occupancy numbers (pupils &amp; students)</b>	<b>Wellfield School</b>	<b>Tanfield School</b>	<b>Total</b>
Number on roll as at 28 September 2018	743	674	1417
Total Capacity of the Schools	1154	788	1942
Spare capacity	411	104	515
% Spare Capacity	36%	13%	27%
% Places Filled	64%	87%	73%

<b>Age Range – Numbers on Roll at 28 September 2018</b>	<b>Wellfield School</b>	<b>Tanfield School</b>	<b>Total</b>
- Year 7	188	168	356
- Year 8	157	163	320
- Year 9	167	131	298
- Year 10	129	106	235
- Year 11	102	106	208
<b>Total on Roll</b>	<b>743</b>	<b>674</b>	<b>1,417</b>

<b>Funding Levels 2018-19 (£)</b>	<b>Wellfield School</b>	<b>Tanfield School</b>	<b>Total</b>
Formula funding 2018-19	3,705,000	3,354,000	7,059,000
Pupil Premium funding 2018-19	289,000	211,000	500,000

<b>Surplus / (Deficit) Balances held and Planned Use of Balances in 2018-19 (£)</b>	<b>Wellfield School</b>	<b>Tanfield School</b>	<b>Net Position</b>
Retained Balance at 31 March 2018	(3,393,000)	(487,000)	(3,880,000)
Forecast use of balances in 2018-19	-	(96,000)	(96,000)
Forecast retained balance at 31 March 2019	<b>(3,393,000)</b>	<b>(583,000)</b>	<b>(3,976,000)</b>

<b>Accumulated Surplus / (Deficit) balances 2013-14 to 2017-18 (£)</b>	<b>Wellfield School</b>	<b>Tanfield School</b>	<b>Net Position</b>
31 March 2013	(157,000)	171,000	14,000
Contribution to or (drawn down) in 2013-14	(546,000)	(19,000)	(564,000)
31 March 2014	(703,000)	152,000	(550,000)
Contribution to or (drawn down) in 2014-15	(684,000)	(101,000)	(785,000)
31 March 2015	(1,387,000)	51,000	(1,335,000)
Contribution to or (draw down) in 2015-16	(746,000)	(90,000)	(836,000)
31 March 2016	(2,133,000)	(39,000)	(2,172,000)
Contribution to or (draw down) in 2016-17	(605,000)	(86,000)	(691,000)
31 March 2017	(2,738,000)	(125,000)	(2,863,000)
Contribution to or (draw down) in 2017-18	(655,000)	(362,000)	(1,017,000)
<b>31 March 2018</b>	<b>(3,393,000)</b>	<b>(487,000)</b>	<b>(3,880,000)</b>

<b>Employee numbers</b>	<b>Wellfield School</b>	<b>Tanfield School</b>	<b>Total</b>
Teaching	50	45	95
Support	53	29	82
<b>Total</b>	<b>103</b>	<b>74</b>	<b>177</b>

- 32 The figures for protected characteristics in the table below are from the May 2018 Schools Census, which is the most recent data available that provides this detail. The total numbers on roll are different to the 28 September figures used in other context tables. In addition, details are not recorded for all pupils. A summary of the equality impacts of these proposals is available in Appendix 1 and the entire Equality Impact Assessment is attached as Appendix 5.

<b>Protected characteristics</b>		<b>Wellfield School</b>	<b>Tanfield School</b>	<b>Total</b>
Disability		13	12	25
Gender reassignment		Data not held-	Data not held	Data not held
Marriage and civil partnership		Data not held	Data not held	Data not held
Pregnancy and maternity		Data not held	Data not held	Data not held
Race	Indian	2	1	3
	Chinese	1	-	1
	Any other mixed background	1	2	3
	White and Asian	4	1	5
	White and Black African	1	-	1
	Any other ethnic group	1	1	1
	White British	631	607	1,238
	White any other background	7	1	8
	Gypsy/Roma	2	-	2
	Other Gypsy/Roma	2	-	2
	Roma	1	-	1
Religion or belief - data not held				
Sex	Male	314	327	641
	Female	341	281	622
Sexual orientation		-	-	-

- 33 The table below shows the value of annual Service Level Agreements (SLAs) that these schools have bought for the current financial year:

<b>2018-19 annual SLA charges (£)</b>	<b>Total for CYPS</b>	<b>Total for Resources</b>	<b>Total for Regeneration and Local Services</b>	<b>Total</b>
Wellfield School	10,000	95,000	5,000	110,000

2018-19 annual SLA charges (£)	Total for CYPS	Total for Resources	Total for Regeneration and Local Services	Total
Tanfield School	15,000	138,000	5,000	158,000
<b>Total by school</b>	<b>25,000</b>	<b>233,000</b>	<b>10,000</b>	<b>268,000</b>

In addition, schools buy other SLAs as required, and buy other goods and services from the Council. In 2017-18, the total income from these schools, excluding annual SLAs, was £100,000, most of which was spent on grounds maintenance, pupil transport and miscellaneous SLAs.

- 34 In the context of finance, members should note that school budgets are set for the financial year, which covers two academic years. Staff restructuring, which is often necessary to balance budgets, often takes effect from September each year, because schools operate on an academic year rather than a financial year. This poses problems in finalising the budgets in April / May for the coming financial year as plans are often not yet fully developed within schools. It is not unreasonable to assume that the outturn position for the primary schools in this area could be better than initially budgeted.
- 35 Members will recall that schools can only set a budget with an in-year deficit, providing that they have sufficient surplus balance (reserves) carried forward to do so. Where a school cannot do this and therefore wishes to set a deficit budget (i.e. its carried forward reserves are less than the amount required to offset the in-year deficit of expenditure over income) it must have permission from the s.151 officer in order to do so.
- 36 The respective duties and responsibilities of schools and local authorities are determined by local schemes of delegation, prepared in line with statutory guidance. These schemes confirm the arrangements for delegation to governing bodies, but also give authorities powers to monitor school budgets and determine whether a school is allowed to set a deficit budget. The scheme also sets out the procedure for dealing with schools causing concern, including the power to require schools to provide budget plans and, in extreme cases, to suspend delegation. Schemes also prohibit authorities from writing-off the deficits of schools with deficit budgets, in order that authorities cannot favour one school over another by allowing one to overspend and write-off the deficit.
- 37 The scheme of delegation allows for deficit budgets, but only for three years, and no more than 20% of the school's budget share, up to a maximum of £750,000. Wellfield School is in breach of this requirement and has been allowed to operate outside of these provisions for a number of years whilst it addressed the issues highlighted in the Ofsted inspection in 2012, the Council awaited the outcome of the governments National Funding Formula and pending the review of schools provision. The Council's external auditors are aware of the situation.

- 38 This has been a significant concession on behalf of the Council, one which many other local authorities would have refused to give, as effectively the accumulated deficit has been a risk to the Council's General Fund / Council taxpayer.
- 39 Had the Council insisted on Wellfield School balancing its budget in previous years it would not have been able to address the issues arising from the Ofsted inspection and fulfil its GCSE National Curriculum requirements. This would inevitably have resulted in a reduction in educational attainment, further accelerated reductions in pupils and ultimately further difficulties in terms of OFSTED -judgements, which in turn would have accentuated their financial difficulties.

### **Options analysis**

- 40 In line with the process agreed by Cabinet in November 2017, detailed consideration has been given to each of the options available in terms of ensuring financially viable education provision in the Wingate area. An overview of the findings of the review are as follows:

#### ***Do nothing***

- 41 Whilst this option would result in no change to existing education provision and home to school transport costs, it is not a viable solution given current financial resources available to the school through formula and other funding, the restrictions placed on the Council in terms of the School Funding Formula and the statutory requirements of the school to set a balanced budget.
- 42 The Corporate Director Resources is responsible by virtue of Section 151 of the Local Government Act 1972 for the administration of the authority's financial affairs. The Corporate Director Resources also has a duty to report certain matters to the authority by virtue of Section 114 of the Local Government Finance Act 1988. These duties extend to ensuring schools do not continue to set deficit budgets year-on-year.
- 43 This option would result in Wellfield School continuing to operate with an unacceptably high accumulated deficit position, perpetuating the current non-compliance with statutory regulations over schools financing. Failure to address this situation is a matter that the Council's External Auditors would have significant concerns over and exposes the Council (and the school) to risk in terms of future financial performance. There would be little or no chance of the school recovering this accumulated deficit over the foreseeable future.
- 44 The Council could insist on Wellfield School balancing its budget and making provision to pay back the accumulated deficit over an agreed period. This would need to be in line with the statutory requirements over school finance. The impact of this would be the requirement for further downsizing and restructuring of the teaching capacity within the school which would impact on its ability to meet the national curriculum requirements and consequentially its overall performance and Ofsted judgements going forward.

- 45 If the school was required to start making savings in 2019-20 to allow it to repay its deficit this would have a significant impact on staffing. The table below shows the potential impact on staff numbers of various options for repaying the deficit:

	Years to recover deficit		
	3 yrs	10 yrs	29yrs
Savings needed to recover deficit in target years (£)	1,131,000	339,300	117,000
Reduction in teaching <i>posts</i>	15.34	4.60	1.59
Reduction in support staff <i>posts</i>	12.84	3.85	1.33
Reduction in teaching <i>workforce</i>	33%	10%	3%
Reduction in support staff <i>workforce</i>	33%	10%	3%

- 46 A recovery period of three-years would be in-line with the limit in the scheme of delegation. A period of ten years is a more realistic option, but would still be a significant reduction in staffing. A reduction of 3% would still mean a significant reduction and would take 27 years to clear the deficit.
- 47 The considered view of the Education Service is that none of these options be a sustainable position, because the reduction in staffing would compromise performance and effectively not a viable solution. Experience elsewhere shows that when standards slip and a poor Ofsted judgement is published, school rolls fall and the financial position becomes worse.

### ***Establish a model of federated schools***

- 48 Under this option, Wellfield School and its feeder primaries or other participating schools would come together to form a single Federation.
- 49 Section 24 of the Education Act 2002 defines a federation as two or more schools operating under a single governing body; maintained schools in federations continue to be individual schools, keeping their existing DfE category; in terms of the school funding formula they retain their separate lump sums. The schools participating in the Federation would pool their resources and have the ability to appoint joint and shared leadership and business support arrangements, releasing efficiencies to allow the collective pool of schools to be financially sustainable.
- 50 However, federations can be informal or formal arrangements. Informal arrangements would involve retention of individual governing bodies, with those schools participating agreeing to work together under a memorandum of understanding to release efficiencies and direct funding towards the school. This would not give the necessary assurances that any budget difficulties would be addressed, with the individual primaries free to leave the arrangement at any time.

- 51 A formal federation, as defined by the Education Act, is considered the only viable solution. This would provide sufficient reassurances of a sustainable arrangement and a conduit through which the financial challenges can collectively be addressed. Under the federated model the net deficit position would remain and be the responsibility of the Federation to address over a mutually agreed timeframe. The Council would have no powers or statutory basis on which to write this off.
- 52 The formula funding arrangements that currently exist would be unaffected by the formation of a Federation of schools. There would be no radical change to existing education provision, with each school remaining as a separate entity within the Federation and no additional home to school transport costs being incurred. There would be limited opportunities to achieve savings through Service level Agreements as each school would retained as a separate cost centre / entity. Leadership, teaching and support staffing would however be pooled and shared in order to increase resilience, release efficiencies, which would be directed towards addressing any in-year and cumulative deficit position within the schools participating in the Federation, such that the Federation overall maintained a surplus position.
- 53 In terms of this option, a federation of Wellfield School with other primary schools in the Wingate area would potentially realise some savings and economies of scale, but the size of the accumulated deficit budget is too large for a federation arrangement to effectively reduce this to zero.
- 54 All primary schools in this planning area are all near capacity and, in a pupil-led funding formula, there is no imminent challenge to their financial viability that would warrant them having to seriously consider joining a federation to secure their own sustainable future. All the schools mentioned in paragraph 21 (above) are judged 'Good' or 'Outstanding' by Ofsted.
- 55 While there may be future educational or other reasons for some of these primary schools to join a federation or form their own federation, there is currently no justification under the Education Review to encourage this action at this stage, though there could clearly be collective savings that could be achieved if this was subsequently pursued.

### ***Amalgamation of schools, with shared leadership***

- 56 Under this option, consideration has been given to whether amalgamating several schools into one school, potentially across several sites, would ease the financial situation facing Wellfield School. Unlike federation, where schools remain as separate organisations, amalgamation creates a single organisation, even when this operates from several sites.
- 57 A possible advantage of amalgamation would be that a single head teacher would be required, enabling budget savings. Other economies of scale may be possible from the wider staff body and across sites through a potential reduced need for multiple service level agreements. However, an amalgamated school would be funded as a single organisation, so would draw

down only one lump sum, thus reducing or negating any savings from staffing and other economies.

58 The amalgamation of Wellfield School with one or more schools would result in the loss of at least one lump sum, which would have the effect of worsening the financial position of the school, and any savings would fall far short of a sum sufficient to clear the accumulated debt.

59 Amalgamating schools does not provide the opportunity to pay off an accumulated debt unless the school/schools in the amalgamation have sufficient carry-forward to cover another school's debt. This would not be the case as no schools in Durham have large enough carry-forwards sufficient for this purpose.

### ***Creation of a multi-academy trust (MAT)***

60 As a school with a significant cumulative deficit, Wellfield School (and Tanfield School for that matter, albeit that the Tanfield School position is considered temporary) could not, without the discretion of the Regional Schools Commissioner (RSC), become an academy. The governors at Wellfield are not receptive to being sponsored by an existing Academy Trust and have expressed a desire to form their own Multi-Academy Trust.

61 In addition, the RSC, in line with national guidelines, will no longer permit schools to convert to become stand-alone academies. Any school wishing to convert would need to do so with one or more MAT partners already identified.

62 The RSC however continues actively to support schools to join multi-academy trusts, and senior officers in her department have confirmed that she is open to the possibility of Wellfield School being part of a MAT as a solution to the difficult historic financial problem facing the school, on condition this is not a proposal for a stand-alone academy conversion, and on condition a full deficit recovery plan is in place so that, at point of conversion, the school would not be carrying over to the newly formed MAT any residual liabilities.

63 Consequently, if Wellfield School becomes an academy the Council would be expected to pay off any accumulated deficit at the point of transfer. As there is a legal imperative that prevents the Section 151 Officer from allowing a school to continue setting a deficit budget beyond a limited time, this option is recommended for consideration.

64 In terms of Tanfield School there is an opportunity for this smaller secondary school to benefit from both the education and financial rigour and progress that Wellfield School has already made and join a progressive partner that will assist, complement and enhance their position in their locality as a specialist but small school. The Governing Body of Tanfield are supportive of joining an Academy Trust with Wellfield School.

65 The formula funding arrangements that currently exist for both schools would be unaffected by the formation of a multi-academy trust of these schools. An

academy trust would be funded directly by the DfE, but its funding would be similar to that of maintained schools, as set out in the schools formula.

- 66 There would be no radical change to existing education provision, with each school remaining as a separate entity within the Trust and no additional home to school transport costs being incurred. The opportunity would exist for leadership, teaching and support staffing to be shared to increase resilience, release efficiencies, and support capacity so that the Trust overall maintains a surplus position.
- 67 In recommending this option, it is important to note that past experience indicates an academy trust is likely to buy fewer services from the Council. A trust would also qualify for 80% relief on business rates. For 2018-19, this relief would reduce the business rates received by the Council by £190,000.
- 68 In coming to this recommendation, officers undertaking the Review considered a range of schools with which Wellfield could potentially partner in a multi-academy trust. These included secondary schools in the vicinity, as well as other schools, including primary schools and Tanfield School, as described above.
- 69 The opportunity to join other multi-academy trusts was also considered, however this was not favoured by Wellfield School for a variety of cultural and curricular reasons. The proposed partnership of Wellfield and Tanfield Schools needs to be formally approved by the RSC. If this formal approval is not subsequently received, the Cabinet would need to consider further its options.

### ***Establish alternative sources of income***

- 70 There would be some limited scope for additional revenue through the provision of support or services by the school or, for example, increased letting. However, even if some income could be raised by these means, the school's accumulated deficit is too great to be reduced to zero.
- 71 In recent years the school has funded school transport to attract additional pupils and increased its marketing of the school and its achievements / standards. The school has developed proposals to increase revenue through wider community participation and use of the facilities, including the development of proposals for a 3G football pitch, with capital investment proposals at an advanced stage, including funding bids to the Football Association.
- 72 The likelihood that the local community, which includes some areas of highest deprivation countywide (top 10-20% against LSOA deprivation measures), could mount a sufficient and sustainable fundraising campaign is remote. Wellfield currently has the largest deficit of all Durham schools, so the expectation that this solution would be possible is perhaps unreasonable.

### ***Closure, or part-closure***

- 73 Whilst not a desired option, this needs consideration should a financially sustainable solution not be ultimately agreed and implemented i.e. where the cost of running a school cannot be met by existing funding arrangements or any other agreed solution, closure must be considered.
- 74 Closure of Wellfield School should ideally be avoided for a number of reasons: rapidly improving educational standards, which make it one of the most effective secondary schools in County Durham and increased pressures on rolls in this area due to pupil forecasts.
- 75 The threat of closure would be likely to destabilise a leadership and staffing structure that has contributed to this improvement. Additionally there would be the challenge of relocating pupils, especially in a period of rapid pupil growth. Also the school buildings have recently been the subject of major investment
- 76 Closure of a school this size would put significant strain on pupil placement in other schools. According to current pupil-place planning data there is insufficient spare capacity in County Durham to disperse all pupils to existing schools within reasonable travelling distance of their homes. An exercise was previously undertaken in 2016 to determine the distance from each child's home address to the nearest school that have spare places available in the relevant year group to accommodate pupils from Wellfield School. It should also be made known that Wellfield School has a Resource Base attached that caters for students with Autistic Syndrome Conditions. Should Wellfield School close, this Resource Base would need to be relocated.
- 77 Numbers of pupils on the roll at schools in Wingate and the surrounding area have increased slightly since that exercise was undertaken and are projected to continue increasing into the future due in the main to the amount of house building in the area. Consequently the data below gives a reasonably accurate picture of not only the number of pupils in that area but the difficulties and complexities of providing places at other schools to pupils displaced by a potential closure of Wellfield School. If the option to consider the closure of Wellfield School is progressed in the future, a similar exercise will be undertaken to ascertain what is likely to be a less favourable position at that exact point in time. In many instances the 'nearest' school(s) by a distance measure only are oversubscribed. Therefore, the information in this report relates to where pupils (Year 7-10) at the time the exercise was undertaken **could** be accommodated as follows:
- **Dene Community School, Peterlee** for 142 pupils - this school is 4.09 miles from Wellfield School (69 require transport - distances could be between 3.22 and 4.85 miles depending on the pupil's home address)
  - **Easington Academy** for 19 pupils - this school is 4.25 miles from Wellfield School (14 require transport - distances could be between 3.1 and 4.5 miles depending on the pupil's home address)

- **Seaham High School** for 81 pupils - this school is 8.65 miles from Wellfield School (79 require transport - distances could be between 8.35 and 10.18 miles depending on the pupil's home address)
- **Framwellgate School Durham, Framwellgate Moor** for 38 pupils - this school is 11.04 miles from Wellfield School (35 require transport - distances could be between 7.8 and 9.34 miles from Wellfield School depending on the pupil's home address)
- **Ferryhill Business and Enterprise College, Ferryhill** for 77 pupils - this school is 11.15 miles from Wellfield School (77 require transport between 4.77 and 9.96 miles depending on the pupil's home address)
- **Whitworth Park Academy, Spennymoor** for 42 pupils - this school is 11.63 miles from Wellfield School (40 require transport distances between 10.46 and 18.02 miles depending on the pupil's home address)
- **Belmont School** for 93 pupils - this school is 8.38 miles from Wellfield School (60 require transport distances between 3.4 and 7.57 miles depending on the pupil's home address).

If places were taken up in the schools above by Wellfield pupils, it would leave a shortfall of places for some pupils who live closest to those schools.

- 78 If Wellfield School closed the travelling distances for the large majority of pupils would increase, for some the journey would be in excess of 15 miles and for a large number the journey would be in excess of 8 miles.
- 79 It is also clear from the exercise undertaken that pupils from particular villages will be travelling to different schools. For example pupils living in Wingate would be attending Dene Community School, Seaham High School and Whitworth Park Academy; pupils from Wheatley Hill would be attending Belmont Community School, Ferryhill Business and Enterprise College, Whitworth Park School and Sixth Form and Framwellgate School Durham depending on their home address. Account also needs to be of how the closure of Wolsingham School & Sixth Form will support and contribute to the LA's duty to promote the use of sustainable travel and transport to school.

### **Home to School Transport Implications**

- 80 It is clear that pupils displaced by the closure of Wellfield School would be travelling to schools in different parts of the county
- 81 The current cost of transporting pupils to Wellfield School is £218,000. The cost of transporting pupils to the next nearest school should Wellfield School close is approximately £210,000.

### **Impact on the Community**

- 82 The closure of Wellfield School would be met with significant opposition from a number of communities in East Durham. The case for closing the school

would need to be robust enough to stand up to challenge, particularly around the areas that need to be considered as part of the DfE's statutory process on proposals to close schools. This will involve having a clear indication for example that education standards will not be impacted upon for pupils if they are displaced as a result of closure and it will not have a significant impact on the distances that pupils would need to travel to another school (as well as costs involved). Additional travelling also has the potential to have greater impacts on pupils with a disability which would need to be mitigated through a personal educational plan or a revised Education and Health Plan and changes to transport arrangements (see Appendix 3 for Equality Impact Assessment).

83 As outlined in paragraphs 68 and 69 of this report, some pupils would have to travel distances of up to 18.02 miles to access a place at another school and journeys of this length would be difficult for the Council to justify and defend if there was a consultation on a proposal to close the school, as the council should comply with national guidance around recommended travelling times for pupils to travel to school.

84 Wellfield School is also frequently used by the community for sport, leisure and a range of other community activities. The school sports hall is widely used throughout the year and is utilised for the following activities:

- Clubbercise - children and adults
- Indoor Cricket
- Indoor Rowing
- Short Tennis
- Family rounders
- Boxercise
- Basketball
- Choir

There are also a range of after school clubs running for pupils between 3.15 and 4.15 pm every day including:

- Fashion Club
- Textiles
- Netball
- Football
- Homework Club
- Fitness Suite
- Hair and Beauty
- Dance
- Girls Rugby

85 The timescale of closure and relocation of pupils in other schools can be estimated as between two and three years, entailing (as it may) permission from one or more academy trust boards, possible consultation, planning, design and building of new provision, plus processes to arrange staff redundancies and site disposal.

## Preferred option for Wellfield School

- 86 The option of creating a multi-academy trust with Tanfield School, Tanfield Nr Stanley, would allow the Council to pay off the historic debt on transfer, and could, if agreed and subsequently implemented, present an opportunity to improve educational standards at Tanfield School also. Through the structure of a MAT, Wellfield School would be partnered with Tanfield School, Tanfield Nr Stanley, and a school that requires support and improvement, and strengthened leadership, which Wellfield School is well-positioned to provide.
- 87 Where a school becomes an academy or obtains an academy sponsor, any deficit balance they are carrying becomes a cost to the local authority and is not transferred to the multi-academy trust on conversion. These costs would need to be met from the earmarked reserve established for this purpose.
- 88 The DfE's view is that local authorities should take responsibility for allowing schools to operate with a deficit balance. While a 'Good' school, even with a deficit budget, is not required to become an academy by any legislation, the process would enable the Council to take steps to pay off the deficit, which under any other circumstances it is legally prevented from doing.
- 89 Ordinarily, a school which is financially unviable would not be taken on by an academy chain, but the steps already taken to achieve an in-year balanced budget would make Wellfield School a good financial prospect, on condition the historic debt can be paid off. The on-going positive outcomes of the school would stand as further collateral, and the direct impact that this is having on the growth of pupil numbers (see paragraph 7, above) promises well for the future.
- 90 Officers from the Regional Schools' Commissioner's office, on behalf of the Department for Education, have been working with Wellfield School to support the partnership process.
- 91 Meetings with Wellfield School's leadership and Chair of Governors have provided reassurances that the school is willing to academise and is prepared to work as part of a MAT with Tanfield School, Stanley, whose leadership has also agreed to participate in such an undertaking. Governing bodies have taken the step of formally expressing their willingness to academise in meetings at each school.
- 92 The final decision rests with the RSC. If agreed, the proposal would be expedited quickly thereafter.
- 93 The estimated deficit balance that the Council would need to write off to the general fund at this stage would be c£3.4m for Wellfield School and c£0.583m for Tanfield School. The earmarked reserve set aside for this purpose, from which this sum would be payable, which has an estimated value at 31 March 2019 of £4.5 million.

## Conclusions

- 94 This report provides Cabinet with details of the work that has been undertaken as part of the review of education provision in County Durham which was agreed by Cabinet on 15 November 2017.
- 95 In general, during the review process, local authority officers have worked with the leaders and governing bodies of those schools most affected, with the intention of managing difficult and sometimes delicate conversations about each school's long-term sustainability and organisational structure. While the potential solution of academisation of Wellfield School was accepted as a necessary course of action, this was not universally welcomed and multiple meetings were required before a way forward could be agreed.
- 96 Meetings involved work with several schools, support to governors and Chairs of Governors, and liaison with the Regional Schools Commissioner's office.
- 97 The report outlines the thorough consideration of all potential options, where following the review it has been concluded that Wellfield School should, subject to the permission of the Regional Schools Commissioner, establish a multi-academy trust (MAT) with Tanfield School, Stanley. The rationale for preferring this over other options is that, if Wellfield School becomes an academy, the Council would be enabled to pay off any accumulated debts removing the unsupportable position whereby the Section 151 Officer would be asked to continue to allow the school to set a deficit budget beyond a limited time.
- 98 This option, if adopted and implemented will stabilise and secure the recovery of Wellfield School and in addition it will add to the good education of the Wellfield area.

## Recommendations

- 99 Cabinet is recommended to note progress made to date, and:
- (a) agree to support the proposal that Wellfield School establishes a multi-academy trust (MAT) with Tanfield School, Stanley;
  - (b) in the event that this is successfully concluded, Cabinet to agree to the Council writing off the deficit balance at the point of conversion, estimated at c£3,400,000 for Wellfield School and c£583,000 for Tanfield School, in line with government expectations of maintained schools with deficit budgets which convert to become academies.
  - (c) in the event that the RSC does not support the proposed partnership between Wellfield and Tanfield School, a further report to Cabinet will be required on the alternative options for school provision in the Wellfield area.

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### **Background papers**

Report to Cabinet 14 December 2016  
Strategy for School Organisation and the Pattern and Provision of Schools across  
County Durham

Report to Cabinet 12 July 2017  
Revenue and Capital Outturn 2016/17

Report to Cabinet 13 September 2017  
Quarter 1 Forecast of Outturn 2017/18

Report to Cabinet 15 November 2017  
Review of School Provision in County Durham: Ensuring Financial Sustainability of  
Schools

Report to Cabinet 13 December 2017  
Mainstream Primary and Secondary Funding Formula 2018-19

Report to Cabinet 13 June 2018  
Maintained Schools Budget Plans and Permission to Set Deficit Budgets 2018/19

Report to Cabinet 12 September 2018  
Forecast of Revenue and Capital Outturn 2018/19 – Period to 30 June 2018

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## **Appendix 1: Implications**

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### **Finance**

Schools are funded through Dedicated Schools Grant and operate to delegated budgets, which are the responsibility of individual school governing bodies. Where a school wishes to set a deficit budget (where its spending exceeds its resources in year) it can only do so in accordance with EFA guidance and the Scheme of Financing for Schools and with the permission of the Council's S151 Officer. In accordance with legal obligations, the S151 Officer may not continue to allow a school to set a deficit budget without a robust business plan that indicates the removal of any deficit over time.

The report outlines the significant financial difficulties that continue to be experienced by schools, the work that has been undertaken with these schools and the options that will need to be explored in terms of a solution to these problems.

The National Funding Formula puts more funding into pupil-led factors than school-led factors, which could create longer-term challenges for smaller schools, because the increase in pupil-led funding will be of less benefit to schools with smaller numbers of pupils.

Should a school close, the additional cost of providing home to school transport to pupils' nearest schools can be significant. There would also need to be significant capital investment to expand other secondary schools to accommodate additional pupils should a secondary school close for financial reasons.

The proposals set out in the report are for Wellfield School, with the permission of the Regional Schools Commissioner, to establish a multi-academy trust (MAT) with Tanfield School, Stanley. In doing so, the Council will need to write off the deficit balance at the point of conversion, estimated at c£3,400,000 for Wellfield School and c£583,000 for Tanfield School.

### **Staffing**

Potential impact on school staff through re-structuring to address deficit balances, or through amalgamation/federation of schools, is indicated in this report. In cases where the Review proposes federation of schools, or academisation, there may be implications for staff in terms of adjustments to some terms and conditions but these will be fully negotiated through the relevant trade unions, where required.

### **Risk**

A key risk is that, as a consequence of actions taken by the County Council (including the failure to make timely interventions), pupils and students do not receive an adequate education. There is an additional risk of reputational damage if the Council does not appear to be able to resolve the problem of schools operating with significant and sometimes increasing budgetary difficulties, and allows some schools to continue to set deficit budgets whilst requiring other schools to balance their budgets.

The s.151 officer must sign-off the budget for schools with a deficit budget plan and needs to be able to justify doing so in terms of each school having a robust plan to

recover from its deficit. The scheme of delegation allows for deficit budgets, but only for three years, and no more than 20% of the school's budget share, up to a maximum of £750,000. There is a risk of legal challenge from the Department for Education if this statutory function is neglected. There is a risk of external auditors calling into question the actions of the s.151 officer if no credible plans are agreed to resolve the issues described in this report and the Cabinet report of November 2017.

### **Equality and Diversity / Public Sector Equality Duty**

Any review or change to educational provision in an area has the potential to adversely impact on protected characteristics, both in terms of pupils, their families, local communities and employees working in the schools. The options described in this and previous reports could involve pupils being required to attend different schools or not being able to access a local school and being required to travel further. However, the recommendations at this stage will minimise the impact.

### **Accommodation**

If school closures are proposed as part of the review of provision, accommodation will be an implication, but this has not formally happened to date. Transfer of maintained schools to become academies may have implications in terms of accommodation where school premises are used by the community under arrangements set up with a maintained school.

### **Crime and Disorder – none**

### **Human Rights**

Human rights are not affected by the recommendations in this report.

### **Consultation**

In line with a strategic approach described in the Cabinet report, 15 November 2017, consultation with the public is a possible outcome of the Education Review. School communities have, to date, been engaged in consultation through governing bodies.

There is no requirement for a school wishing to become an academy or be part of a MAT to run a consultation, but many schools choose to either consult with parents and stakeholders or at least notify them of the intention to join the MAT. Although stakeholders do not need to be consulted, staff will need to be formally informed and consulted about the transfer of their employment under the Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE).

### **Procurement – n/a**

### **Disability Issues**

see 'Equality and Diversity' above.

### **Legal Implications**

The actions described in this report are intended to comply with the Council's duty to exercise its education functions with a view to promoting high standards and the fulfilment of each pupil's learning potential in accordance with S 13 A of the Education Act 1996.

The Corporate Director Resources is responsible by virtue of Section 151 of the Local Government Act 1972 for the administration of the authority's financial affairs. The Corporate Director Resources also has a duty to report certain matters to the authority by virtue of Section 114 of the Local Government Finance Act 1988.

Schools have delegated budgets, but if a school closes or converts as a sponsored academy then any deficit balance remains with the Council, which must meet the cost of writing-off the deficit from its general funds. Surplus balances of closing schools are credited to the Council, but it does not retain any surplus balance for a school becoming a sponsored academy: the academy receives the balance upon conversion.

The funding framework governing schools finance, which replaced Local Management of Schools, is based on the legislative provisions in sections 45-53 of the School Standards and Framework Act 1998. Under this legislation the Council is required to publish a Scheme of Financing for Schools. The scheme sets out the financial relationship between the authority and the maintained schools which it funds, including the respective roles and responsibilities of the authority and the schools. The scheme does not limit unreasonably the flexibility of schools to control and deploy their budgets, recognising the need for public monies are involved to be properly accounted for and recorded. The scheme includes provisions which are binding on both parties. Under the scheme, any deficits of expenditure against budget share (formula funding and other income due to the school) in any financial year will be charged against the school and will be deducted from the following year's budget share to establish the funding available to the school for the coming year.

Schools cannot set a deficit budget without the prior agreement in writing of the authority. For clarity, a deficit budget is one where the gross expenditure in the budget plan exceeds the total of funding, income and the balance (surplus or deficit) brought forward from the previous year. This consent is given by the Section 151 officer - Corporate Director, Resources.

## Appendix 2: Context of the Wingate Schools and Tanfield School

<i>Number on Roll</i>	Wingate	Thornley	Wheatley Hill	Hesleden	Hutton Henry	St. Mary's, Wingate	St. Godric's, Thornley	Wellfield School	Total
Reception to Y 11	358	182	198	133	70	58	87	743	1,829
Spare capacity	1	14	12	16	-14	26	18	411	484

<i>Funding (£)</i>	Wingate	Thornley	Wheatley Hill	Hesleden	Hutton Henry	St. Mary's, Wingate	St. Godric's, Thornley	Wellfield School	Total
Formula funding 2018-19	1,516,000	794,000	836,000	502,000	379,000	327,000	508,000	3,705,000	8,567,000
Pupil Premium funding 2018-19	158,000	87,000	136,000	46,000	22,000	23,000	26,000	289,000	788,000

<i>2018-19 use of balances (£) *</i>	Wingate	Thornley	Wheatley Hill	Hesleden	Hutton Henry	St. Mary's, Wingate	St. Godric's, Thornley	Wellfield School	Total
Balance at 31 March 2018	64,000	92,000	77,000	53,000	83,000	6,000	27,000	3,393,000	3,794,000
Forecast use of balances in 18-19	13,000	(21,000)	4,000	(10,000)	(19,000)	1,000	7,000	-	(24,000)
Forecast balance at 31 March 2019	77,000	71,000	81,000	42,000	64,000	7,000	34,000	3,393,000	3,770,000

\* Figures in brackets are deficit balances and decreases in balances

## Appendix 2: Context of the Wingate Schools and Tanfield School

<i>Accumulated balances (£) *</i>	Wingate	Thornley	Wheatley Hill	Hesleden	Hutton Henry	St. Mary's, Wingate	St. Godric's, Thornley	Wellfield School	Total
31 March 2013	88,000	55,000	66,000	41,000	10,000	13,000	39,000	(157,000)	155,000
Change in 2013-14	87,000	35,000	48,000	29,000	70,000	13,000	6,000	(546,000)	(257,000)
31 March 2014	175,000	90,000	113,000	71,000	81,000	27,000	45,000	(703,000)	(102,000)
Change in 2014-15	(53,000)	67,000	19,000	(24,000)	5,000	(5,000)	10,000	(684,000)	(666,000)
31 March 2015	122,000	157,000	132,000	47,000	86,000	22,000	54,000	(1,387,000)	(768,000)
Change in 2015-16	13,000	(27,000)	38,000	(11,000)	42,000	(12,000)	(10,000)	(746,000)	(713,000)
31 March 2016	135,000	130,000	170,000	35,000	127,000	9,000	44,000	(2,133,000)	(1,481,000)
Change in 2016-17	(102,000)	(51,000)	(53,000)	8,000	(34,000)	10,000	(28,000)	(605,000)	(854,000)
31 March 2017	34,000	79,000	118,000	44,000	93,000	20,000	16,000	(2,738,000)	(2,334,000)
Change in 2017-18	30,000	13,000	(41,000)	9,000	(11,000)	(14,000)	10,000	(655,000)	(658,000)
31 March 2018	64,000	92,000	77,000	53,000	83,000	6,000	27,000	(3,393,000)	(2,993,000)

\* Figures in brackets are deficit balances and decreases in balances

	Wingate	Thornley	Wheatley Hill	Hesleden	Hutton Henry	St. Mary's, Wingate	St. Godric's, Thornley	Wellfield School	Total
<i>Employee numbers</i>									
Teaching	21	13	10	6	4	5	7	50	116
Support	47	22	36	11	9	8	11	53	197
Total	68	35	46	17	13	13	18	103	313

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### **Appendix 3: Equality Impact Assessment Summary**

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Creation of a multi-academy trust (MAT) should not impact negatively on pupils.

A period of change from a maintained school to an academy within a MAT may have some adverse effect on staff.

School closures, however, would impact directly on staff and pupils, including those in protected groups and vulnerable pupils. In this case, significant equalities mitigation will be required.

A fixed, reliable and secure planning framework of governance, staffing and finance as offered by a MAT would enable the delivery of a resilient education.