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Merton Council
Children and Young People Overview and Scrutiny Panel

Date: 17 September 2013
Time: 7.15 pm
Venue: Committee rooms B & C, Merton Civic Centre

AGENDA

This is a public meeting – members of the public are very welcome to attend. The meeting room will be open to members of the public from 7.00 p.m.

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Children and Young People Overview and Scrutiny Panel membership

Councillors:
Jeff Hanna (Chair)
Agatha Mary Akyigyina
Laxmi Attawar
Iain Dysart
Karin Forbes
James Holmes (Vice-Chair)
Oonagh Moulton
Linda Taylor OBE
Ray Tindle
Philip Jones
Substitute members:
Mary-Jane Jeanes
Peter McCabe
John Sargeant
Debbie Shears
David Chung

Voting co-opted representatives
Vacancy, Primary school parent governor representative
Peter Connellan, Roman Catholic diocese
Colin Powell, Church of England diocese
Dr Joanne Sullivan-Lyons, Secondary school parent governors
Non-voting co-opted representatives
Alison Jerrard, Secondary headteachers
Wendy Veazey, Primary headteachers

Note on declarations of interest

Members are advised to declare any Disclosable Pecuniary Interest in any matter to be considered at the meeting. If a pecuniary interest is declared they should withdraw from the meeting room during the whole of the consideration of that mater and must not participate in any vote on that matter. If members consider they should not participate because of a non-pecuniary interest which may give rise to a perception of bias, they should declare this, .withdraw and not participate in consideration of the item. For further advice please speak with the Assistant Director of Corporate Governance.

What is Overview and Scrutiny?
Overview and Scrutiny describes the way Merton's scrutiny councillors hold the Council's Executive (the Cabinet) to account to make sure that they take the right decisions for the Borough. Scrutiny panels also carry out reviews of Council services or issues to identify ways the Council can improve or develop new policy to meet the needs of local people. From May 2008, the Overview & Scrutiny Commission and Panels have been restructured and the Panels renamed to reflect the Local Area Agreement strategic themes.

Scrutiny's work falls into four broad areas:

⇒ **Call-in**: If three (non-executive) councillors feel that a decision made by the Cabinet is inappropriate they can 'call the decision in' after it has been made to prevent the decision taking immediate effect. They can then interview the Cabinet Member or Council Officers and make recommendations to the decision-maker suggesting improvements.
⇒ **Policy Reviews**: The panels carry out detailed, evidence-based assessments of Council services or issues that affect the lives of local people. At the end of the review the panels issue a report setting out their findings and recommendations for improvement and present it to Cabinet and other partner agencies. During the reviews, panels will gather information, evidence and opinions from Council officers, external bodies and organisations and members of the public to help them understand the key issues relating to the review topic.
⇒ **One-Off Reviews**: Panels often want to have a quick, one-off review of a topic and will ask Council officers to come and speak to them about a particular service or issue before making recommendations to the Cabinet.
⇒ **Scrutiny of Council Documents**: Panels also examine key Council documents, such as the budget, the Business Plan and the Best Value Performance Plan.

Scrutiny panels need the help of local people, partners and community groups to make sure that Merton delivers effective services. If you think there is something that scrutiny should look at, or have views on current reviews being carried out by scrutiny, let us know.

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CHILDREN AND YOUNG PEOPLE OVERVIEW & SCRUTINY PANEL
4TH JULY 2013

7.15PM – 9:20PM

PRESENT:	Councillor Jeff Hanna (in the chair), Councillors James Holmes, Agatha Akyigyina, Laxmi Attawar, Iain Dysart, Karin Forbes, Oonagh Moulton, Linda Taylor, Phillip Jones (replacing Peter Walker)
	Co-opted members –Peter Connellan
ALSO PRESENT:	Councillors Maxi Martin (Cabinet Member for Children's Services), Martin Whelton (Cabinet Member for Education)
	Paul Angeli (Head of Children's Social Care), Paul Ballatt (Head of Commissioning, Strategy and Performance), Jan Martin (Head of Education)

1   DECLARATIONS OF PECUNIARY INTEREST

None

2   APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor Peter Walker, Colin Powell, Yvette Stanley and Dr. Jo Sullivan Lyons.

3   MINUTES OF THE MEETING HELD ON 4 JULY 2013

The Minutes were agreed as a true record.

RESOLVED: The Panel agreed the minutes as a true record of the meeting.

4   MATTERS ARISING

Councillor Jeff Hanna welcomed Peter Conellan, Roman Catholic Diocesan Representative on the Panel.

The Panel agreed to rearrange the order of the agenda to the following to enable Councillor Martin Whelton to speak on item 5 when he arrived:

Item 6 – Home Office Peer Review and Gang Call In

Item 7 – Update on Transforming Families Initiative and the PRG funded Phipps Bridge Project

Item 5 – Children, Schools and Families Departmental Priorities for 2013/14

Item 8 – Scrutiny Review of the Provision of Secondary School Places – Progress Report

Item 9 – Update on developments in Children, Schools and Families

Item 10 – Performance Monitoring

Item 11 – Work Programme 2013/14

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5   HOME OFFICE PEER REVIEW AND GANG CALL IN (Item 6)

Paul Angeli introduced the report. He informed the Panel that the findings of the review had been a positive reflection of the work in Merton and of the staff that directly work with young people. There is strong partnership working and effective data sharing arrangements in place with the MASH ensuring gang activity can be identified. The review identified a number of improvements which could be made, including developing a shared narrative across the strategic partnership. The next steps now include engaging the voluntary sector and community in the management of youth violence and gang activity. There is more work to be done in protecting women against violence, and a strategic action plan is being developed to address the points for improvement/action from the review.

Councillor James Holmes asked if the action plan could be brought to a future meeting to enable the Panel to scrutinise this and to maintain an overview in terms of performance management. Paul Angeli agreed to this request.

Councillor Maxi Martin added that discussions were being held to develop the action plan with the relevant stakeholders and to ensure a strategic overview which was previously absent. Engagement with other local authorities was also cited as key. Paul Ballatt confirmed that the action plan could be brought to the Panel as part of the standard update report at the September 2013 meeting.

Councillor Laxmi Attawar sought clarification on the role of CAMHS. Paul Angeli confirmed that the review concluded that CAMHS staff couldn't clearly see the links between gang activity and mental health and that more understanding of this by professionals was needed. Paul Ballatt added that a number of young people that engage in gang activity often have low self esteem and a range of measures were being put in place to help them resist/divert from gang activity. The work of CAMHS was central to this.

Councillor Linda Taylor asked for practical, measureable, time bound actions within the action plan and felt that partnership working was central to this. Paul Angeli agreed that this was important, particularly in addressing the serious issues identified in the review regarding violence against women.

Councillor Iain Dysart asked who the interviews had been held with and also what level of police staff were engaged in MASH. Paul Angeli drew the Panel's attention to the list of those interviewed in the report. Paul Angeli also clarified that police officers were involved in the MASH and that they had direct access to police intelligence which was invaluable to the MASH.

Councillor Jeff Hanna sought clarification on the definition of a gang and also the extent of the gang activity in Merton. Paul Angeli confirmed that a definition of gang activity was included in the report. The council and its partners were working with young people identified as being involved, and those on the

periphery of involvement, in gang activity. Paul Angeli added that gang activity had been disrupted in the borough and that Merton does not experience the level of gang activity in comparison to other inner London boroughs. The nature of gang difficulties in other boroughs was often associated with postcodes and territorial issues. Gangs in Merton often emerged with groups of young people coming together to engage in criminalised activity that may not be territorial in nature. However, the peer review challenged Merton, and our partners, to develop a clear narrative view on the extent of gang activity in the borough and how this risk might be addressed.

Councillor Agatha Akyigyina asked about health partners and when they would be fully engaged. Paul Angeli explained that the council were in the process of trying to engage health partners, not just CAMHS and mental health agencies. Paul Ballatt added that the current Children and Young People's Plan 2013-16 was agreed by the Children's Trust Board and that actions within this plan were based on all agencies working together to address youth violence and gang activity.

Councillor Oonagh Moulton asked about how MASH had been publicised. Councillor James Holmes asked if the borough had a gang problem. Councillor Maxi Martin explained that some residents were engaged in gang activity across borough boundaries. Early intervention was therefore key.

Councillor Agatha Akyigyina stated that young people must be engaged and interested in education. More time spent in schools will limit opportunities for young people to get involved in gang activity.

RESOLVED: Panel noted the report and expressed thanks and appreciation to officers for the positive work underway which was reflected in the findings of the review. Panel agreed to consider the action plan at their September 2013 meeting.

6   UPDATE ON TRANSFORMING FAMILIES INITIATIVE AND THE PRG FUNDED PHIPPS BRIDGE PROJECT (Item 7)

Paul Angeli introduced the report and confirmed that a Transforming Families Team were in place and providing direct support to families that have been identified as meeting the DCLG criteria which covers:

- Worklessness;
- Anti social behaviour; and
- Non school attendance

During 2012/13, the team will work with 124 families. Paul Angeli confirmed that DCLG were happy to date with the approach taken by Merton. The impact of the work to date can be established from July 2013 onwards. The team are still on a learning curve and there is no hard data that has been able to be captured so early into the programme. However, anecdotal evidence would suggest that there have been some positive changes to date. In particular

there have been improvements in getting people back into work and in school attendance.

Councillor Jeff Hanna enquired about how Merton Council would evaluate the success of the programme and also if the information on how the programme would be evaluated could be made available to the Panel to consider. Paul Angeli explained that internal audits of work with families would be undertaken. Further to this, a sample of cases would be taken by DCLG and analysis and feedback would be undertaken. In addition, a longitudinal study over the 3 year programme would demonstrate, at appropriate intervals, that intervention and work with families had been sustained in the long term.

Councillor Jeff Hanna asked how progress to date could be compared with the outcomes of the work already undertaken with troubled families by a number of existing teams. Paul Angeli confirmed that a number of different measurement criteria were in place that would support the council in this task. In addition, the Transforming Families Programme had a number of defined outcomes it wished to achieve. It is also driven by a number of financial benefits that can be achieved by the programme and early intervention.

Councillor James Holmes asked about the three key challenges that the team faced in delivering this programme and the Phipps Bridge Project. Paul Angeli outlined the following challenges:

- Engaging partners more widely,

- Engaging adult services substance misuse teams and CAMHS, for sustained change; and

- Ensuring a 6 month turnaround to get people in the position to apply for work and sustained support for families in this

Paul Angeli explained that the nature of the problems the DCLG have focused on are more complex and require a sophisticated approach by the team to work with all different sorts of families. The programme, on a national level, has demonstrated that some families won't make changes and we will need to consider how to address the problems of families that are more intractable

Councillor James Holmes enquired if we had sufficient teams and resources in house to deliver the programme if we were unable to engage partner organisations. Paul Angeli explained that we need partnership engagement to support families with a range of problems. Whilst internal resources are significant, it is important to include other partners such as mental health services.

Councillor Agatha Akyigyina asked about addressing issues beyond the three year programme. Paul Ballatt said that central government often implement short term initiatives and that sustainability is always an issue for local authorities. Central government were looking at the added value of a programme like this and if finances would allow, it may continue beyond the initial three year period. Councillor Oonagh Moulton asked about the number

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of families identified and the targets linked to funding. Paul Angeli confirmed that target figures had been given directly by DCLG. The funding reflects the families the council would be working with within the year. DCLG maintain close contact with the council to ensure funds are being appropriately spent. DCLG have been happy with the work undertaken to date, however, the council needed to demonstrate outcomes as the programme works on payment by results.

Councillor Iain Dysart enquired if school attendance was satisfactory or better since the programme began. Paul Angeli confirmed that some improvements in attendance had been identified and that fuller information about the improvements in educational attainment would be established when validated data became available. In relation to current targets for this group of young people the council are on target on its initial review. The council are hitting their current target of young people being in school 90% of the time.

Councillor Linda Taylor enquired about the number of practioners and what percentage of their time was spent with families. Paul Angeli confirmed that there are 8 case work practitioners with 6-7 cases each. Councillor Linda Taylor added that there needs to be guidance on how much time is spent working with families in comparison to time spent on paperwork. Paul Angeli added that this could be considered but that accountability measures also needed to be in place.

RESOLVED: Panel noted the report.

7   CHILDREN, SCHOOLS AND FAMILIES DEPARTMENTAL PRIORITIES 2013/14 (Item 5)

Councillor Maxi Martin outlined her priorities for the year ahead and highlighted the importance of
- partnership working;
- delivering the Children and Young People's Plan;
- delivering the Transforming Families Programme; and
- Ensuring a balance between universal, targeted and specialist services, due to the financial climate and resource implications.

Councillor Martin Whelton highlighted his priorities for the following year:
- Primary School Places – no bulge classes and only permanent expansions planned;
- Meet increase in demand for school places, primary and secondary;
- Improve schools and standards;
- Ensure Merton Partnership and schools are working collaboratively, sharing best practice; and
- Skills development and reducing number of NEET's (Not in Education, Employment or Training)

Paul Ballatt explained that Merton Council was committed to moving from a good to outstanding position in Children, Schools and Families services. The key to this was partnership, collaboration, integrated processes, and building upon existing working relationships. A number of partner organisations need to be re-engaged at a more strategic level following major changes affecting them and the council needs to be more targeted in interventions in a difficult financial climate. The use of data and quality assurance mechanisms would be critical. Furthermore, the recent changes in the organisational structure of CSF have impacted on how services would be delivered in the future and there was an increased focus on reviewing and measuring performance and impact. The council also has to deliver services in a time of major demographic change, in which the number and diversity of the population created certain challenges and would inevitably impact on service delivery.

Councillor Oonagh Moulton commented on the increase in births in Wimbledon Park and asked what the council were doing to increase the number of school places in this area to meet demand, as well as providing a greater range of schools. Councillor Martin Whelton explained that he wanted to ensure that there were sufficient school places that were as local for children and parents as possible. In addition, the types of schools the borough has would be based on an evaluation of what would improve standards. The interests of the child come first and the council would work with schools to ensure improvement.

Councillor James Holmes congratulated the department on the good work they do with schools' to improve school standards. He added that there was a role for scrutiny in supporting the council to achieve its strategic aims and that the Panel should play a role in measurement and impact. Councillor James Holmes went on to question the Cabinet Members on what success would look like against these strategic priorities in 12 months time. Councillor Maxi Martin explained that for her it would be that MASH was embedded, that partnership working was stronger and working effectively, and that the council would gain outstanding status in all of its inspections, although she acknowledged that this was very ambitious, the key was to strive for continuous improvement. The council should also be inspection ready and the Transforming Families Programme would be properly embedded.

Councillor Iain Dysart enquired about the extent of partnership at strategic and operational levels. Paul Ballatt explained that there had been a recent round-table discussion with senior health partners which identified a new agenda for partnership following a period of major organisational change in the health sector. GPs and the Clinical Commissioning Group are key to this, having been less engaged previously in the children's integrated services agenda. Furthermore at an operational level, partner training on the new common and shared assessment model would be built upon.

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Councillor Dysart also asked if there is preference data on a ward basis on which families get choice of school and could this be made available. Paul Ballatt committed to dedicating administrative resource to collating data on this basis and making this information available in due course.

Councillor Maxi Martin explained that the Transforming Families programme was being implemented in a slow and measured way because the programme had to be robust enough to continue after the three years had ended. Councillor Agatha Akyigyina voiced her concerns that in the past multi-agency initiatives, such as MASH, have often lacked communication between agencies. She emphasised that agencies needed to talk both on the front line and at a strategic level. Councillor Agatha Akyigyina also added that she was concerned that Children's Services seemed to be focusing efforts on a higher threshold of need and concentrating less on CYP at a lower level of need but who would benefit from early intervention, tackling their issues before they became significantly worse. Officers recognised this is a risk in times of reduced resources and will be keeping the balance of services under constant review.

RESOLVED: Panel noted the report.

8   SCRUTINY REVIEW OF THE PROVISION OF SECONDARY SCHOOL PLACES – PROGRESS REPORT (Item 8)

RESOLVED: Panel noted the report.

9   UPDATE ON DEVELOPMENTS AFFECTING CHILDREN, SCHOOLS AND FAMILIES DEPARTMENT (Item 9)

Paul Ballatt introduced the report and drew particular attention to the tabled note providing an update on primary school expansion, in particular on Dundonald School.

Councillor Agatha Akyigyina enquired about the details of the Academy Sponsorship of Benedict school. Councillor Laxmi Attawar asked about what information we held on Chapel St as an organisation to determine that they were the right organisation for the role.

Councillor James Holmes clarified that Chapel Street were a small organisational charity whose overriding ethos was to put the family and community at the heart of the school. A presentation was received form Harris and from Chapel Street and both sponsors underwent a rigorous application and assessment process before being considered as a potential sponsor.

RESOLVED: Panel noted the report.

10   PERFORMANCE MONITORING (Item 10)

Paul Ballatt introduced the report and tabled the May performance data that was not available at the time of publication of the agenda. The new table of

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data responded to the Panels request to show deviation and provide a more accurate representation of performance. The basket of indicators the Panel scrutinised had remained from the 2012/13 work programme. Paul Ballatt also highlighted changes to existing measures, for example, the Common and Shared Assessment Framework replaces the Common Assessment Framework.

Councillor Agatha Akyigyina wished to note that she was not happy with the number of amber and red status performance indicators. Paul Ballatt noted this comment and responded by explaining that the CSF department had undergone a significant amount of organisational change and that the department would keep moving towards ensuring all targets were green.

RESOLVED: Panel noted the report.

11 WORK PROGRAMME 2013/14 (Item 11)

Councillor Jeff Hanna drew the Panels attention to the recommendations within the report and sought agreement to the Panels proposed 2013/14 work programme.

RESOLVED:

Panel agreed their 2013/14 work programme, subject to the inclusions and amendments discussed above;

Panel agreed to not appoint budget and performance monitoring scrutiny lead roles but to undertake these roles collectively;

Panel agreed to forward any identified training needs to the scrutiny team in due course;

Panel agreed to undertake a task group review of school leadership and BME succession planning and appointed a task group. Councillors Dysart, Akyigyina and Holmes will sit on the Task Group.

Committee: Children and Young People Overview and Scrutiny Panel

Date: 17 September 2013

Wards:

Subject: Provision of School Places – update and future stratgey

Lead officer: Yvette Stanley, Director of Children, Schools and Families Department

Lead member: Cllr Martin Whelton

Forward Plan reference number: N/A

Contact officers: Paul Ballatt, Head of Commissioning, Strategy and Performance;

Tom Procter, Service Manager, Contracts, Procurement and School Organisation

Recommendations:

A. Panel members note and discuss the contents of this report

1	PURPOSE OF REPORT AND EXECUTIVE SUMMARY

1.1. This report provides members of the Children and Young People Overview and Scrutiny Panel with details of progress made in providing additional school places in the borough to ensure the council fulfils its duty to provide sufficient and suitable places for all pupils who wish to attend Merton schools.

1.2. In line with many urban local authorities across the country and in London, Merton has been experiencing a significant increase in demand for school places caused by a child population growth reflected in a dramatic increase in the live birth figure and other demographic factors.

1.3. This increase has, to date, required the provision of significant additional permanent capacity in the primary school sector achieved through expansion of existing schools. More expansion of primary school places is anticipated through to 2020/21, albeit some likely to be via temporary provision.

1.4. Demand for secondary school places will start to increase in 2014/15 with pressure on sufficiency of places beginning to be felt in 2015/16, with existing surplus places in the sector rapidly diminishing and total year 7 places needing to increase moderately at this time, and accelerating over the following years to keep up with demand. A major secondary places expansion programme will be required through to the early 2020s.

1.5. Some additional special educational needs (SEN) places have already been provided in further specialist provision within mainstream schools and through expansion of existing special schools. In line with increases in the general population, demand for SEN places will continue to grow into the next decade.

1.6. The report details expansion projects undertaken to date and in planning. It informs members of the planning assumptions made for the next phase of the expansion programme and provides some detail in respect of how officers will approach the further demand across all school sectors. The report is as detailed as possible bearing in mind that while providing sufficient and suitable school places requires a strategic approach it is also necessary to ensure flexibility as, while it is possible to forecast general changes in demand, it is not possible to forecast the exact level of demand in all specific areas given the many changing factors that contribute to the demand for school places.

2 DETAILS

Primary Places

2.1. From a baseline position in 2007/08, Merton is committed to providing 21 additional forms of entry in the borough's primary schools in permanent accommodation. A form of entry provides 30 places per year, and as it flows through into all seven years of primary school, the additional 21 forms of entry will provide an extra 4,410 permanent primary school places.

2.2. In 2013/14 the extra provision in reception class is 18 forms of entry (540 extra reception places) compared to 2007/08 and temporary provision has been utilised to complement permanent provision to ensure sufficient places have been provided every year since the substantial increase in demand commenced in school reception year in 2008/09. The strategy is to plan for permanent school expansions when there is a high level of certainty that the places will still be needed in the medium and long term.

2.3. Officers have sought to provide additional places against a set of criteria established in 2010 following wide ranging consultation with schools and the public:

- The council should aim to provide more places in existing good and outstanding schools

- More places should be provided in popular and oversubscribed schools

- The council should aim to expand small schools on the basis of increasing financial sustainability

- Additional places should be provided as near to the location of the additional demand as possible to provide local schools for local children

- The additional places should be provided in good quality accommodation, permanent where necessary

- The council should ensure it achieves good value for money and provide the additional places in the most affordable ways possible

2.4 The above criteria has therefore informed a strategy that has been focused to date on expanding existing schools. The table below provides an update of the permanent expansion schemes providing 21 forms of entry:

TABLE OF PERMANENT SCHOOL EXPANSIONS FROM 2008/09

	School	Year of first Additional	Status

		Reception Class	
1	Wimbledon Chase	2008/09	Permanent Scheme completed
2	Holy Trinity CE	2008/09	Permanent Scheme completed
3	St Thomas Of Canterbury RC	2008/09	Permanent Scheme completed
4	Benedict	2009/10	Permanent Scheme completed
5	Hollymount	2009/10	Permanent Scheme completed
6	Joseph Hood	2009/10	Permanent Scheme completed
7	Aragon	2010/11	Permanent Scheme completed
8	Cranmer	2010/11	Permanent Scheme to contract in 2013
9	All Saints CE (Haydons Road))	2011/12	Permanent Scheme completed
10	Gorringe Park	2011/12	Permanent Scheme in progress
11	Liberty	2011/12	Permanent Scheme completed
12	St Mary's RC	2011/12	Phase 1 permanent scheme completed – phase 2 to contract in 2013
13 and 14	Singlegate	2011/12	Phase 1 permanent scheme completed. Phase 2 incorporates adjacent former school building purchased to allow school to be 3 forms of entry from 2014/15. To contract in early 2014.
15	William Morris	2011/12	Permanent scheme completed
16	Wimbledon Park	2011/12	Permanent scheme to complete in late 2013
17	Dundonald	2011/12 (But not in 2012/13 or 2013/14	Scheme delayed by legal issues but planned to contract in spring 2014
18	Hillcross	2011/12	Permanent Scheme to contract in 2013
19	Merton Abbey	2011/12	Permanent Scheme to contract in 2013
20	Poplar	2012/13 (But not in 2013/14)	Permanent Scheme to contract in 2013
21	Pelham	2012/13	Permanent Scheme to contract in 2013

Note – in various years The Priory, Bishop Gilpin, Beecholme and Garfield (3rd form of entry) have provided single year solutions to provide additional school places but permanent expansion is not currently planned. Garfield permanently expanded to 2 forms of entry from 2006 and so is not included in this table

2.5   Of the 21 permanent additional forms of entry provided in 20 schools , 17 are currently rated good or outstanding by Ofsted, and 12 were 1form of entry schools classed as 'small'. The schools have been expanded in the geographic areas where there is most need thus not increasing travel distance for local residents to attend school. Schemes have been carefully assessed and monitored by senior managers and by project managers to ensure affordability.

2.6　　　　The council has needed to carefully manage the balancing act of sound forward planning, but regular review to ensure the surplus is as low as reasonably possible. This includes assessing admissions information including school preferences and residence location in relation to schools. As a result, it has been possible to operate to a very low surplus, generally of around 2%, yet increase the number of pupils obtaining places at higher preferences school. Previously the council operated to the traditional Audit Commission recommendation of 5-10% surplus places which is not affordable given the level of expansion required.

2.7　　　　The number of expansion schemes to manage has been a major challenge for the council, requiring complex preliminary planning, consultation and engagement, design and procurement processes to be undertaken and project management of the delivery stage requiring careful stakeholder management, problem solving and robust relationships with contractors. While there have inevitably been many issues to resolve, this major programme of expansions has been undertaken effectively with schools and parents being highly satisfied with the expanded schools.

2.8　　　　In July Cabinet approved that the council should enter into contracts for construction of seven expansion schemes at Cranmer, Hillcross, Merton Abbey, Pelham, Poplar, St. Mary's RC (phase 2), and Singlegate Primary Schools (phase 2). Following delays due to the legal complexities, it is expected that the council will be able to contract for the expansion of Dundonald Primary School in spring 2014, thereby fully delivering the 21 forms of entry required, and in an area where there is some of the greatest pressure on places.

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Primary places – future need and strategy

2.9　　　　In implementing the strategy to provide sufficient and suitable places, officers have regularly refreshed planning assumptions based on GLA pupil projection data and local intelligence. At the time of writing this report, for September 2013 intake, there were 62 vacancies across Merton's primary schools and 44 unplaced applicants, all of which have been provided with a reasonable offer of a place. This again demonstrates that, to date, officers' planning has successfully ensured sufficient places across the sector, working to a small contingency for surplus places that allows little room for error.

2.10　　　The GLA pupil projection forecasts show a considerable increase in demand in reception year places up to 2017/18, showing that on the basis of the council having a total admission number of 2730 (the 21 form of entry increase referred to in the above paragraphs) there will be a small deficit in 2014/15 increasing to 167 reception places in 2017/18 based on its standard model.

2.11　　　A summary of analysis of GLA pupil projection models to 2020-21 is contained at Appendix 1, including planning area level, showing the greatest pressure on places will be in Wimbledon and central Mitcham/Colliers Wood.

2.12　　　However, further local intelligence regarding recent admissions applications show that this may be a slightly high forecast. The council also needs to take into consideration the potential impact on demand of the proposed new Park Community Free School likely to be sited on the Merton/Kingston border.

2.13   Given the lack of certainty for demand beyond the 21 forms of entry, and that there are currently two schools with a spare classroom that could provide one extra class in an emergency, officers are adopting a prudent approach to planning for future expansions.

2.14   At this stage officers are not progressing specific permanent school expansions beyond the 21 forms of entry committed and plan to use temporary provision until it is clear where any further permanent school expansion in the primary sector is needed for the long term. We will be keeping need under review with the cabinet member for education and schools.

2.15   A major housing development scheme could have an impact on local provision and this, as well as a number of other factor that cannot be foreseen with certainty, could impact on places over the next 5-10 years.

Secondary Places strategy

2.16   Officers have been considering the future impact of the increasing demand in the primary sector on Merton's secondary school provision for some time. This has involved consultation with schools and governing bodies; examination of GLA pupil projection models; analysis of retention rates of pupils leaving primary and entering secondary provision; high level feasibility studies of existing secondary school sites and the commissioning of a site search to identify possible sites for new provision.

2.17   Although medium term forecasting need for secondary school provision should be easier than for primary provision since cohorts of school pupils will be in the state school system seven years previously, in practice, there are a number of variables which make planning for secondary school places extremely complex.

2.18   These factors include the fact that the secondary school population is inherently more mobile than in the primary sector; the attractiveness of types of education e.g. grammar and faith schools in neighbouring boroughs, and those boroughs' own plans for secondary provision. There have also been a significant number of approved secondary Free Schools (State funded schools directly approved and funded by the Department for Education) in south London which will add to the number of available places over the next few years. Changes to migration patterns and levels and location of housing development also need to be taken into consideration, and cannot be forecast with certainty.

2.19   All these factors may have significant impact on the transfer rates from primary to secondary school and demand overall and officers, therefore, need to take both a cautious and pragmatic approach to planning for secondary provision.

2.20   A summary of analysis of current admission numbers, numbers on roll and GLA pupil projection data is contained at appendix 2. This analysis suggests that demand for secondary school places will start to increase in 2014/15 with pressure on sufficiency of places beginning to be felt in 2015/16, with existing surplus places in the sector rapidly diminishing and total year 7 places needing to increase moderately at this time. The increase would then need to accelerate and there will be a significant increase in 2018/19. By the early 2020 the total increase is likely to be between 20 and 30 additional forms of entry in secondary provision compared to current admission numbers.

2.21 Following consultation with schools, the cabinet member for education and other cabinet colleagues, engagement with the secondary places scrutiny task group and discussions with education professionals within CSF Department, an outline 'direction of travel' to develop the strategy has been proposed and agreed.

2.22 Key elements of this direction of travel are:

- A phased approach is appropriate for secondary school expansion in Merton over the next ten years, subject to regular reviews of supply and demand, and decisions made to ensure that places are provided when there is a 'basic need' (overall shortfall in the area of supply of places)

- The additional capacity required will be met through expansion of existing secondary schools and establishment of new provision.

- The initial phase will require schools to fill existing surplus places and the three academies to return to admission numbers set at the point of school re-organisation in the early 2000s. All secondary schools except the two Catholic School will, at that point, be 8 forms of entry ("FE") (240 places per year).

- Further school expansion to complement the above to provide sufficient places, with the aim that schools should not be more than 10FE (300 places per year

- Officers will progress the feasibility of a new school/school provision to assist in providing for the exceptional increase in demand in year 7 from September 2018.

- A second new school/provision would be implemented if it became clear in the latter half of this decade that the increase to provide basic need places will be at the higher end of the projections, and it is required to ensure that existing schools do not permanently provide for above 10FE.

SEN Places strategy

2.23 LB Merton caters for pupils with SEN (Special Educational needs) through mainstream schools, specialist provision within mainstream schools ("additional resourced provision"), special schools, and use of independent provision. There are three maintained special schools, and three primary and three secondary schools provide specialist provision for pupils with ASD (autistic spectrum disorders) and SCLN (Speech, language and communication needs). There is also a Pupil Referral Unit (SMART centre) which operates under the same management as Melrose, our special school for pupils with emotional and behavioural difficulties.

2.24 The strategy in recent years has been to ensure this balance of provision is maintained in light of increased demand, and to ensure that, where possible, there is a reduced reliance on more expensive independent provision where it is not necessary. To this end the council has over the past five years:

- Provided suitable accommodation for pupils at Perseid School (for pupils with severe and complex learning difficulties) through a new secondary school site and a modest increase in capacity

- Provided further early years and key stage 1 places at Perseid School to meet demand
- Additional places at Cricket Green School (children with additional complex and varied needs) including 6th form provision to meet demand
- Changed the designation of Garden School specialist provision to be for ASD

2.25   In order to provide for the increase in demand the following will be required over the next 10 years:

- Increase the capacity of Perseid lower school to 84 places by 2015/16, and to subsequently increase the capacity of the upper school thereafter to meet the higher cohorts of pupils
- Further increase special school places for children with additional complex and varied needs
- Increase the number of additional ASD places in specialist provision within mainstream school both in the primary and secondary school sector

3   ALTERNATIVE OPTIONS

3.1.   The council has a statutory duty to provide sufficient school places so, given the increase in demand, there is no alternative but to provide more school places in the borough. There is a range of options to deliver this, and this report set out the general strategy which will require more detailed options appraisals.

4   CONSULTATION UNDERTAKEN OR PROPOSED

4.1.   All plans implemented to date in respect of the provision of additional pupil places have been subject to consultation, some required in connection with statutory processes. This will also be the case for future plans to expand provision.

5   TIMETABLE

5.1.   This report covers additional school places provided and required between 2008-09 and 2021-22.

6   FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS

Capital

6.1   The cost to provide additional school places to ensure sufficient provision is substantial. The council has the statutory responsibility to provide sufficient places so is ultimately responsible for funding sufficient school places in its area but there is an expectation that there will be substantial assistance from central government grant from the Department for Education (DfE) and Section 106/CILL as appropriate.

6.2   To date, while DfE funding has been substantial, and was aided this year by LB Merton's highly successful Targeted Basic need bid over £15 million, the council is still paying substantial additional sums to fund the school expansion programme.

6.3   The estimated expenditure required to deliver the revised programme up to 2016/17 is incorporated into the approved capital programme and revisions to this will be presented to the September 2013 Cabinet meeting. The funding

required for 2017/18 is being progressed as part of the MTFS 2014-18 (including any revenue funding required). Finally, estimated expenditure up to 2022/23 is being built into the indicative capital programme.

6.4   As the strategy develops into specific schemes they will be subject to more detailed feasibility studies and design work with a view to obtaining best value for money and, together with external funding, will be reviewed in the normal way as part of the annual capital programme review process

Revenue

Expanding schools

6.5.   The revenue impact to operate the larger schools will be funded through the Dedicated Schools Grant (DSG), which increases on the basis of additional pupils, although there is a delay in receiving the funding for the additional pupils and it is not retrospective. This is the position whichever school is expanded. The DSG is top-sliced to provide expanding primary schools £60,000 per class to fund revenue costs from September onwards. It is envisaged that a similar scheme will operate for secondary schools.

New schools

6.6   Under current legislation/regulations the new school(s) would be either a free school(s) or academies, although this will complicate their revenue funding it will follow the same principles of any other school expansion.

7   LEGAL AND STATUTORY IMPLICATIONS

7.1   The council has a duty under section 14 of the education act 1996 to secure that sufficient schools for providing primary and secondary education are available for its area. It must respond to any parental representations on the exercise of this duty.

7.2   Where a maintained school is to be permanently expanded, the council must first follow the statutory process for "prescribed alterations" to schools. One of the factors to be taken into account is the need for places and there is a presumption in favour of proposals to expand successful and popular schools to meet parental preference. The decision maker must also consider the effect on standards, including on other schools in the area and whether capital funds are available for the proposal to be implemented.

7.3   The council can propose a permanent increase in capacity for any type of maintained school, including foundation or voluntary schools but must follow the statutory procedure..

7.4   Temporary expansions of schools by the addition of a reception class as an exception to the normal published admission number or an increase in the published admission number would need to be agreed by the admission authority for the school.

7.5   Where there is not space to extend a school on its current site, consideration can be given to expansion elsewhere, creating a "split site" school. This may be more efficient than creating a new, very small school on a new site.

7.6	The legislation on new schools has been amended with effect from 1 February 2012 by the Education Act 2011. There is now a presumption that new publicly funded schools will be academies or free schools. The council would be required to transfer the site for a new academy to a new provider and provide capital funding for the new school.
7.7	The government is encouraging communities to propose new 'free schools' which have the same legal structure and requirements as academies. Free schools may be established in response to invitations for academy proposals by local authorities seeking to establish a new school or may be established through an annual application process under the government's free school programme.

8 HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS

8.1. The school expansion programme will be considered in the light of equalities legislation, and ensure that all children, including with special education needs, have access to a suitable school place.

9 CRIME AND DISORDER IMPLICATIONS

9.1. No specific implications from this report.

10 RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS

10.1. The school expansion is a major programme with significant risks which are managed at project and programme level.

11 APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT

Appendix 1 - Primary school pupil projection data

Appendix 2 – Secondary school pupil projection data

Appendix 3 – SEN data

12 BACKGROUND PAPERS

N/A

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Provision of school places report – update and future strategy

Appendix 1 - Primary School provision

TABLE 1- ACTUAL AND GLAs FORECAST ROLL AGAINST ADMISSION NUMBERS INCLUDING PLANNED INCREASES

	Total admission number (PAN)	Cumulative extra PAN since 2007/08	Actual roll/GLA Standard projection published Spring '12	Surplus/Deficit (-) against PAN (No allowance for 2% surplus)	Extra FEs required above 21FE planned, with 2% surplus allowance		Zero development forecast	Alternate model forecast
2007/08	**2100**		**1,937**	**63**				
2008/09	**2190**	**3fe**	**2,140**	**50**				
2009/10	**2280**	**6fe**	**2,229**	**51**				
2010/11	**2370**	**9fe**	**2,285**	**85**				
2011/12	**2670**	**19fe**	**2651**	**19**				
2012/13	**2730**	**21fe**	**2599**	**131**				
2013/14	2640	18fe	2637	3			2,600	2,677
2014/15	2730	21fe*	2775	-45	4-5FE (25-26 FE since 2007		2,718	2,844
2015/16	2730	21fe*	2779	-49	4-5FE (25-26 FE since 2007)		2,727	2,898
2016/17	2730	21fe*	2897	-167	7-8FE (28-29 FE since 2007)		2,812	3,032
2017/18	2730	21fe*	2885	-155	7-8FE		2,783	3,065
2018/19	2730	21fe*	2844	-114	6-7FE		2,731	3,069
2019/20	2730	21fe*	2783	-53	4FE		2,663	3,052
2020/21	2730	21fe*	2727	3	2FE		2,597	3,031
2021/22	2730	21fe*	2661	69	0FE		2,533	3,006

Notes

"FE" is a form of entry – 30 places per year

"PAN" is published admission number. Column 2 is the total of all school PANs for LB Merton primary schools

We are seeking to provide a 2% surplus (i.e. approximately 60 places) so ideally the surplus in 5th column above should be around 60. The 6th column therefore shows the FEs required after allowing for the 2% surplus i.e. 60 places/2FE.

Park Community "Free" School is planned to open in September 2014 on the LB Merton/RB Kingston borders and provide 60 places per year (2FE). This will be above the 2640 places stated

It should be noted that based on admissions information for September 2013 the GLA forecasts are expected to be approximately 60 (i.e. 2FE) higher than actual. Using their standard model forecasts and the same over forecast in September 2014, 2730 reception places plus Park Community School may be sufficient for September 2014, but contingency plans will be in place.

TABLE 2- GLA 2013 STANDARD PROJECTION MODEL PUPIL FORECASTS BY SCHOOL PLACES PLANNING AREAS FOR STATUTORY SCHOOL YEARS

PLAN AREA 1 Hillside, Raynes Park and Village wards
PLAN AREA 2 Cannon Hill, Lower Morden and West Barnes wards
PLAN AREA 3 Abbey, Dundonald, Merton Park, Trinity and Wimbledon Park
PLAN AREA 4 Ravensbury and St. Helier wards
PLAN AREA 5 Colliers Wood, Cricket Green, Figge's Marsh, Graveney and Lavender Fields
PLAN AREA 6 Longthornton and Pollards Hill wards

PA	2013/14											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	200	207	208	221	202	163	171	0	0	0	0	0
2	399	399	398	365	327	315	292	0	0	0	0	0
3	733	739	728	554	537	516	451	0	0	0	0	0
4	214	213	211	211	212	207	192	0	0	0	0	0
5	785	781	769	673	649	616	546	0	0	0	0	0
6	306	287	314	271	281	276	245	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	1498	1461	1456	1515	1577
Total	2637	2625	2629	2296	2208	2092	1896	1498	1461	1456	1515	1577

PA	2014/15											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	212	198	207	208	221	202	163	0	0	0	0	0
2	419	393	398	398	365	327	315	0	0	0	0	0
3	782	731	737	726	553	536	515	0	0	0	0	0
4	220	217	212	211	211	211	206	0	0	0	0	0
5	840	786	781	769	673	649	615	0	0	0	0	0
6	303	321	290	317	274	283	278	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	1557	1498	1460	1457	1514
Total	2775	2645	2625	2629	2296	2208	2092	1557	1498	1460	1457	1514

PA	2015/16											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	214	209	197	206	207	220	201	0	0	0	0	0
2	412	412	392	397	397	364	326	0	0	0	0	0
3	808	780	729	736	725	552	535	0	0	0	0	0
4	213	222	216	212	210	210	211	0	0	0	0	0
5	837	842	788	783	769	674	649	0	0	0	0	0
6	314	313	321	290	317	273	283	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	1716	1556	1496	1459	1454
Total	2799	2780	2643	2623	2627	2294	2206	1716	1556	1496	1459	1454

PA	2016/17											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	214	211	209	197	206	207	220	0	0	0	0	0
2	420	406	411	391	397	396	363	0	0	0	0	0
3	815	806	778	728	734	724	551	0	0	0	0	0
4	233	215	222	215	211	209	210	0	0	0	0	0
5	892	839	842	788	783	770	674	0	0	0	0	0
6	323	324	312	320	289	316	273	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	1807	1714	1553	1495	1457
Total	2897	2801	2775	2639	2619	2623	2291	1807	1714	1553	1495	1457

PA	2017/18											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	212	211	211	208	196	205	206	0	0	0	0	0
2	417	413	405	410	390	396	396	0	0	0	0	0
3	803	812	804	776	726	732	722	0	0	0	0	0
4	233	235	215	221	215	210	209	0	0	0	0	0
5	892	893	839	842	787	783	770	0	0	0	0	0
6	328	333	323	311	320	288	316	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	1877	1805	1711	1551	1492
Total	2885	2898	2795	2769	2634	2615	2619	1877	1805	1711	1551	1492

Increase 2013/14 to 2017/18

PA	Reception	1	2	3	4	5	6	7	8	9	10	11
1	12	4	3	-13	-6	42	36	0	0	0	0	0
2	18	15	6	45	63	81	103	0	0	0	0	0
3	70	74	75	222	189	216	272	0	0	0	0	0
4	18	22	3	9	3	3	17	0	0	0	0	0
5	107	112	70	169	139	168	224	0	0	0	0	0
6	22	46	9	40	39	13	71	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	379	344	254	37	-86
Total	248	273	167	473	426	523	722	379	344	254	37	-86

TABLE 3 - GLA PUBLISHED 21 DECEMBER 2012 (2011 CENSUS BASED) - LB MERTON POPULATION FOR MALES AND FEMALES AGE 4 (FIRST YEAR OF PRIMARY SCHOOL)

Year	"SHLAA" model persons 4 years		"Trend-based" model persons 4 years
2007	2,276		2,276
2008	2,420		2,420
2009	2,499		2,499
2010	2,543		2,543
2011	2,790		2,790
2012	2,786		2,806
2013	2,746		2,788
2014	2,922		2,995
2015	2,926		3,027
2016	3,062		3,188
2017	3,061		3,229
2018	3,033		3,239
2019	2,983		3,222
2020	2,933		3,201
2021	2,882		3,176
2022	2,833		3,148
2023	2,797		3,130
2024	2,773		3,121
2025	2,752		3,112

'SHLAA' is the GLA population projection model which is linked to development trajectories from the Strategic Housing Land Availability Assessment (SHLAA).

The "Trend-based" projection doesn't take dwellings into account but considers births, population (by single year of age), migration (outflows and inflows), total fertility rates, and life expectancy at birth.

The GLA previously only provided the 'SHLAA' model, but found in recent years that it severely under estimated the growth in child population as it did not take account of the rising child per dwelling ratio. The "trend based" is an alternative model produced by the

GLA for the first time; the GLA feel it may be more accurate for councils without significant new build.

Appendix 2 - Secondary school provision

TABLE 4 – CURRENT ADMISSION NUMBERS AND NUMBER ON ROLL

	Year 7 Admis. No Sep 2013	Year 7 No. on roll Jan 13
Harris Academy Morden	180	95
Raynes Park High School	240	149
Ricards Lodge High School	240	238
Rutlish School	240	233
Ursuline High School Wimbledon	210	209
Wimbledon College	199	202
Harris Academy Merton	180	178
St Mark's Church of England Academy	180	150
TOTAL	**1669**	**1454**

TABLE 5 – GLA STANDARD MODEL – SUMMARY OF CUMULATIVE EXTRA FEs REQUIRED WITH 2% SURPLUS (DETAIL IN TABLE 6)

	Cumulative extra FEs required with 2% surplus – standard model
2015/16	3-4FE
2016/17	6-7FE
2017/18	9FE
2018/19	18FE
2019/20	18FE
2020/21	18FE
2021/22	21FE
2022/23	21-22FE
2023/24	24FE
2024/25	24FE
2025/26	23FE
2026/27	21FE
2027/28	20FE
2028/29	18FE
2029/30	17FE

TABLE 6 – FUTURE DEFICIT OF PLACES AGAINST GLA'S 3 PUPIL PROJECTION MODELS

	Deficit (-) against Sep 13 admission numbers "Standard"	Deficit in FEs ***	Deficit (-) against Sep 13 admission numbers "Zero development"	Deficit in FEs ***	Deficit (-) against Sep 13 admission numbers "Alternate"	Deficit in FEs ***
2013/14	172	3.7	182	4.1	159	3.3
2014/15	113	1.8	129	2.3	92	1.1
2015/16	-47	-3.6	-25	-2.8	-78	-4.6
2016/17	-138	-6.6	-111	-5.7	-182	-8.1
2017/18	-208	-8.9	-177	-7.9	-265	-10.8
2018/19	-477	-17.9	-437	-16.6	-557	-20.6
2019/20	-467	-17.6	-423	-16.1	-567	-20.9
2020/21 *	-469	-17.6	-420	-16.0	-594	-21.8
2021/22	-573	-21.1	-515	-19.2	-733	-26.4
2022/23	-586	-21.5	-520	-19.3	-772	-27.7
2023/24**	-665	-24.2	-589	-21.6	-882	-31.4
2024/25	-654	-23.8	-567	-20.9	-906	-32.2
2025/26	-622	-22.7	-525	-19.5	-905	-32.2
2026/27	-576	-21.2	-471	-17.7	-885	-31.5
2027/28	-531	-19.7	-419	-16.0	-861	-30.7
2028/29	-485	-18.2	-368	-14.3	-835	-29.8
2029/30	-442	-16.7	-320	-12.7	-809	-29.0

*** 2 FE (60 places) added to actual deficit to allow a minimum surplus of 2-3%
 "FEs" are forms of entry – 30 pupils per year group and the accepted steps that schools would expand in. A 1 FE expansion would be 30 pupils per year, 150 pupils in the 5 fully statutory year groups of secondary school.

Standard based on the GLA's "SHLAA" population projection model, zero development based on no developments, and alternate based on the GLA's "trend based" population model. See table 5 for explanation. All GLA projections based on a transfer rate from primary to secondary school of approximately 80%.

Peak in yellow

* From this year projections don't take into account actual reception year rolls
** From this year projections don't take account of live birth data

The three models shows a difference in the peak in demand of just over 10 forms of entry, the equivalent of more than a large secondary school.

The council has also considered simple transfer rate models based on an 80%, 85% and 90% year 6 to year 7 transfer. This shows the increase in 2022/23 would need to be:
Based on 80%: 20FE expansion required by 2024/25 including 2% surplus allowance
Based on 85%: 23FE expansion required including 2% surplus allowance
Based on 90%: 27FE expansion required including 2% surplus allowance

TABLE 7- GLA PUBLISHED 21 DECEMBER 2012 (2011 CENSUS BASED) - LB MERTON POPULATION FOR MALES AND FEMALES AGE 11 (FIRST YEAR OF SECONDARY SCHOOL)

Year	MF11 SHLAA		MF11 Trend based	
2001	2148		2,148	
2002	2123		2,123	
2003	2065		2,065	
2004	2064		2,064	
2005	1904		1,904	
2006	1989		1,989	
2007	1970		1,970	
2008	2157		2,157	
2009	2119		2,119	
2010	2113		2,113	
2011	2078		2,078	
2012	2109		2,119	
2013	1999		2,016	
2014	2057		2,084	
2015	2173		2,211	
2016	2292		2,342	
2017	2328		2,390	
2018	2489		2,569	
2019	2496		2,593	
2020	2469		2,585	
2021	2586		2,731	
2022	2598		2,767	
2023	2696		2,889	
2024	2704	705 extra (85% is 600)	2,928	912 extra (85% is 775)
2025	2689		2,940	
2026	2655		2,927	
2027	2622		2,912	
2028	2590		2,892	
2029	2557		2,869	
2030	2534		2,854	

 'SHLAA' is the GLA population projection model which is linked to development trajectories from the Strategic Housing Land Availability Assessment (SHLAA).

The "Trend-based" projection doesn't take dwellings into account but considers births, population (by single year of age), migration (outflows and inflows), total fertility rates, and life expectancy at birth.

The GLA previously only provided the 'SHLAA" model, but found in recent years that it severely under estimated the growth in child population as it did not take account of the rising child per dwelling ratio. The "trend based" is an alternative model produced by the GLA for the first time; the GLA feel it may be more accurate for councils without significant new build.

# Appendix 3 – Special school provision

Changing pattern of SEN provision in the London Borough of Merton

Number of pupils with a statement of SEN maintained by the London Borough of Merton[1]

	2008	2009	2010	2011	2012	2013
Merton	967	922	885	894	925	986

Number of pupils with a statement of SEN that attend a school in the London Borough of Merton[2]

	2008	2009	2010	2011	2012	2013
Merton	927	928	891	922	962	-
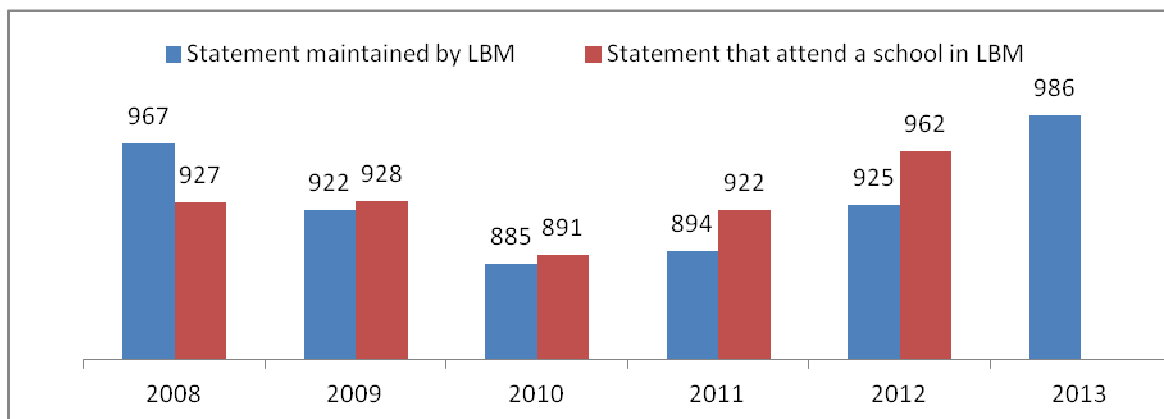
Number of new statements issued per calendar year by the London Borough of Merton[3]

SEN2 Year	2008	2009	2010	2011	2012	2013
Under 5	28	27	-	26	40	41
5 to 10	41	41	-	43	62	68
11 to 15	20	38	-	24	29	42
16 to 19	0	0	-	4	2	3
Total	**89**	**106**	**90**	**97**	**133**	**154**

[1] Source: LBM SEN2 Returns 2008-2013
[2] Source: DfE School Census 2008-2012
[3] Source: LBM SEN2 Returns 2008-2013
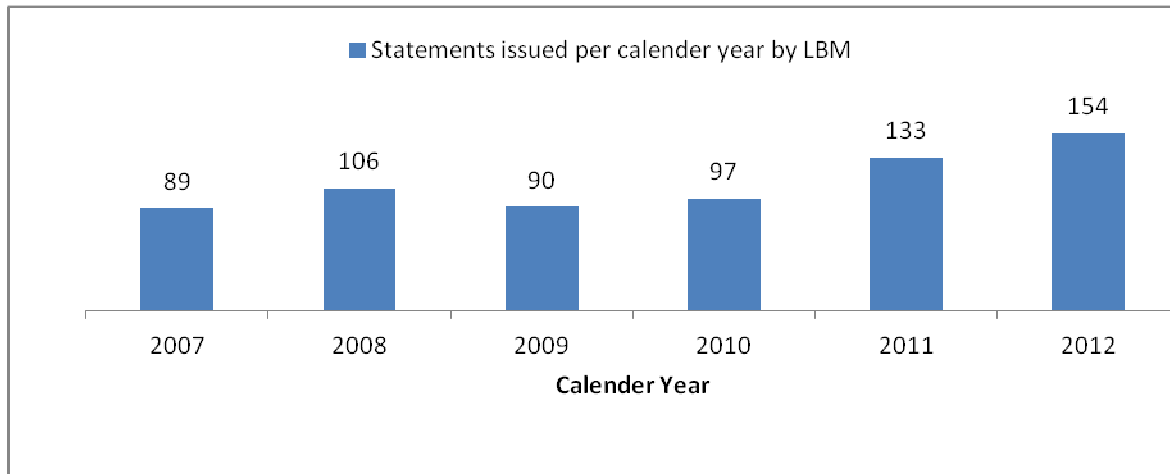
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Number of new statements issued per calendar year by the London Borough of Merton with high needs.[45]

SEN2 Year	2008	2009	2010	2011	2012	2013
High needs pupils	25	33	*	15	28	41
Total new statements	**89**	**106**	**90**	**97**	**133**	**154**
High needs %	28.1	31.1	*	15.5	21.2	26.6

Number of pupils with statements maintained by the London Borough of Merton with high needs[6]

SEN2 Year	2008	2009	2010	2011	2012	2013
High needs	429	417	405	413	441	513
Total statements	**967**	**922**	**885**	**894**	**925**	**986**
High needs %	44.4	45.2	45.8	46.2	47.7	52.0

Percentage of school population attending mainstream and special schools by primary need in the London Borough of Merton [78]

Primary Need	2008	2009	2010	2011	2012	2013
A S D	0.61	0.09	0.68	0.69	0.69	0.90
B E S D	1.95	1.81	2.20	2.60	2.14	2.01
H I	0.17	0.07	0.10	0.08	0.07	0.07
M L D	1.32	0.66	1.29	1.17	1.02	1.08
M S I	0.00	n/a	0.00	0.01	0.01	0.02
O T H	0.20	0.12	0.19	0.17	0.13	0.11
P D	0.23	0.08	0.25	0.23	0.19	0.20
P M L D	0.26	n/a	0.25	0.24	0.25	0.19
S L C N	1.89	1.27	1.95	2.00	1.98	2.04
S L D	0.21	0.05	0.23	0.22	0.25	0.32
S P L D	0.83	0.79	0.91	0.99	0.95	0.91
V I	0.08	0.03	0.07	0.09	0.07	0.03

Number of pupils with statements of SEN maintained by the London Borough of Merton that attend an out of borough placement [910]

[4] Source: LBM SEN2 Returns 2008-2013
[5] High Needs in this report are defined as pupils with statements of SEN that attend a specialist school, additionally resourced provision or alternative provision (including maintained, academies, independent and non maintained settings
[6] Source: LBM SEN2 Returns 2008-2013
[7] Source: Spring School Census 2008-2013
[8] Primary Need is recorded on the School Census for pupils on School Action Plus and statement of SEN only
[9] Source: LBM SENDIS Strategy 2008-2020, Phase Six Proposals 2013 18 January 2013.

SEN2 Year	2008	2009	2010	2011	2012	2013
Out of borough	176	151	141	135	154	156
Total statements	**967**	**922**	**885**	**894**	**925**	**986**
Out of borough %	18.2	16.4	15.9	15.1	16.6	15.8

[10] In this report out of borough refers to state funded specialist placements located outside the borough of Merton and all independent and non maintained schools)

Committee: Children and Young People Overview and Scrutiny Panel

Date: 17 September 2013

Wards: All Wards

Subject: Scrutiny Review of the provision of secondary school places – Draft Final Report

Lead officer: Rebecca Redman, Scrutiny Officer

Lead member: Councillor James Holmes and Councillor Peter Walker, Co-Chairmen of the provision of secondary school places Task Group

Contact Officer: Rebecca Redman - rebecca.redman@merton.gov.uk 020 8545 4035

_____

Recommendations:

A.   That the Children and Young People O&S Panel considers and endorses the report arising from the scrutiny review of the provision of secondary school places, attached at Appendix 1.

B.   That the Panel agrees to forward the review report to Cabinet for approval at their October 2013 meeting.

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1.   PURPOSE OF REPORT AND EXECUTIVE SUMMARY

1.1   To present the draft Final Report and emerging recommendations resulting from the Task Group review of the provision of secondary school places to the Children and Young People O&S Panel for endorsement and to seek agreement to forward the report to Cabinet for consideration.

2.   DETAILS

2.1   At the first meeting of the 2012/13 Municipal Year, the Children and Young People O&S Panel agreed to undertake a scrutiny review of the provision of secondary school places, with a view to making recommendations that would support the council to meet the projected demand for secondary school places in Merton.

3.   CONSULTATION UNDERTAKEN

3.1   In carrying out its review, the task group engaged a range of stakeholders, council officers and Cabinet Members to ensure evidence based recommendations could be made that would support achievement of the overarching objective of this review: *to support the council to meet future demand for secondary school places in Merton.*

4.   TIMETABLE

4.1   The Panel receives the draft Final Report and recommendations at its meeting on 17th September 2013.

4.2   The Panel endorse and send the report to Cabinet for consideration at their October 2013 meeting.

4.3   The Panel receives an Executive Response and Action Plan from Cabinet further to consideration of the Final Report and recommendations at their meeting in January 2014.

5.   FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS

5.1   None for the purposes of this covering report.

6.   LEGAL AND STATUTORY IMPLICATIONS

6.1   None for the purposes of this covering report. Scrutiny work involves consideration of the legal and statutory implications of the topic being scrutinised.

7.   HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS

7.1   It is a fundamental aim of the scrutiny process to ensure that there is full and equal access to the democratic process through public involvement and engaging with local partners in scrutiny reviews. Furthermore, the outcomes of reviews are intended to benefit all sections of the local community. An Equalities Impact Assessment has been completed as part of the review process and is available within the draft Final Report (Appendix 1 of this report).

8.   CRIME AND DISORDER IMPLICATIONS

8.1   None for the purposes of this covering report. Scrutiny work involves consideration of the crime and disorder implications of the topic being scrutinised.

9.   RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS

9.1   None for the purposes of this covering report.

10.   APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT

10.1   Appendix 1 – Draft Final Report – Provision of secondary school places Task Group.

11.   BACKGROUND PAPERS

11.1   None for this report.

London Borough of Merton

Report and Recommendations arising from the Scrutiny Review on the provision of secondary school places

Children and Young People Overview & Scrutiny Panel

September 2013

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Task Group Members
Councillor Peter Walker (Co-Chair)
Councillor James Holmes (Co-Chair)
Councillor Agatha Akiygyina
Councillor Oonagh Moulton
Councillor Karin Forbes
Councillor Iain Dysart
Alison Jerrard (co-optee)

Scrutiny Support
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Acknowledgements
The task group would like to thank all the officers and external witnesses who have taken the time to provide written and verbal information and discussed ideas with us.

All contributors are listed in Appendix 1 of this report.

Foreword by the Co-Chairmen of the Task Group

Councillor Peter Walker and Councillor James Holmes
Co-Chairmen, Provision of Secondary School Places Task Group

It is now just over a year since this task group was set up by the Children and Young People Overview and Scrutiny Panel. Our task was to look at the options the Council could consider in light of the known increase in demand for secondary school places. This increase is a result of the 39% increase in recent years, of children entering our primary schools.

The report demonstrates that we have comprehensively examined the options the Council faces if we are to meet the future needs of children in Merton for secondary school places.

We believe that by expanding some of our existing schools we can meet the initial surge in numbers up to 2015/16. However, it is clear that by 2018 there will need to be extra school building on another site or sites.

We have set out our recommendations for the Council to consider. We recognise that much will depend on Government grants in the coming years. We are also aware of the need for access to capital funding for new building and the knock on effect this will have on the Council's revenue budget.

We would like to draw attention to the consensus that we achieved, across all four party groups, in putting together these recommendations. I can honestly say that not once did we have to resort to voting on any of the key issues that we considered. For this reason, we want to thank all members of the Task Group and our respective Co-chairs, for the serious and considered way in which they undertook this task. I am happy to commend this report for consideration by the Scrutiny Panel.

Executive Summary

The task group was set up in order to undertake a review of the provision of secondary school places in Merton. The Task Group aimed to support the Authority to meet the increased demand for secondary school places in the borough by exploring the projected demand, the financial resources required and potential income streams, the views of Secondary School Head Teachers, Youth Parliament and good practice in neighbouring local authorities.

Acknowledging that this is an area that does not have a simple solution, particularly in terms of land/site availability and resources required, the Task Group sought to identify a number of potential solutions and areas for further exploration in an attempt to move forward with preparations to cater for the projected demand for secondary school places.

The recommendations are listed in full overleaf.

List of Task Group Recommendations:

Recommendations	Responsible Decision Making Body
Recommendation 1	
That building extra classes be considered by Cabinet alongside proposals for a new school.	Cabinet
Recommendation 2	
That Cabinet consider how demand for secondary school provision might best be met across borough boundaries with view to developing existing or new partnerships to facilitate a sub-regional approach to the provision of secondary school places and enable split site provision.	Cabinet
Recommendation 3	
That Cabinet explore the specific needs of those interested in attending Faith Schools in the borough and how this may support the council to meet demand.	Cabinet
Recommendation 4	
That Cabinet explore the possibility of discussing with outstanding Head Teachers how they might assist actively in managing multiple school sites to ensure school standards continuously improve	Cabinet
Recommendation 5	
That Cabinet consider the opportunities presented for additional income by placing additional facilities on sites that are funded, run privately or by the local authority.	Cabinet
Recommendation 6	
That a specialist commercial agency be engaged to examine available assets with a view to including them in a financial model which could possibly provide an income stream to repay any borrowing to meet demand and provide secondary school places.	Cabinet

Report of the Provision of Secondary School Places Task Group

1.   Introduction

Purpose

1.1   At the Scrutiny Topic Selection Evening in May 2012, those members interested or involved in the Children and Young People Overview and Scrutiny Panel discussed possible topics for review that had been suggested by members of the community, councillors and officers.

1.2   The Council's Children and Young People Overview and Scrutiny Panel, at its meeting on 3rd July 2012, agreed to establish a task group review to look at the provision of secondary school places. At this meeting the following members were appointed to the task group:

Councillor Peter Walker (Co-Chair)
Councillor James Holmes (Co-Chair)
Councillor Agatha Akiygyina
Councillor Oonagh Moulton
Councillor Karin Forbes
Councillor Iain Dysart
Alison Jerrard (co-optee)

1.3   The terms of reference for the review were agreed as follows:

- Review the planning assumptions relating to the projected increased demand;
- Examine the public policy factors which impact on the provision of school places;
- Examine options available to the council and their funding implications;
- Identify strategies employed by other councils with similar challenges; and
- Report on findings and recommendations

Aim of the Review

1.4   The Task Group noted that the Cabinet had taken the decision to seek a site for one new school to meet secondary school places demand, with the rest of the demand for school places being met though expansion at their meeting in February 2012. Officers were asked, at this meeting, to also address the need for significant expansion required in the special school sector and ensure value for money. Practical options that would provide good quality education facilities but take into consideration the considerable financial constraints on the council.

1.5   Members acknowledged that Merton Council faced a major logistical and financial challenge over the coming years to meet significant additional demand for secondary school places arising from the increase in school age population currently being experienced within the primary sector and that any strategy would also need to consider the issues the council might face in commissioning new school provision. The aim of this review was to support the Council to meet this demand and the associated issues identified.

What the Task Group Did:

1.6   The Task Group held six meetings at which a wide range of evidence was considered including:

- Detailed officer reports supplemented by verbal evidence;
- Best practice from neighbouring Local Authorities;
- Government legislation and guidance (national, regional and local policy);
- Reports/presentations from Secondary Heads Representative;
- Site visits to other schools;
- Consultation with Secondary Head Teachers, Youth Parliament and School Governors; and
- Research reports/Briefing papers

1.7   This report sets out the task group's findings, conclusions and recommendations. The task group's recommendations run throughout the report and are set out in full at the front of this document.

2.   Policy and Legislative Framework - Secondary School Provision

2.1   The council has a duty under section 14 of the Education Act 1996 to ensure that sufficient schools for providing primary and secondary education are available for its area. It must respond to any parental representations on the exercise of this duty.

2.2   Where a maintained school is to be permanently expanded, the council must first follow the statutory process for "prescribed alterations" to schools. This applies to permanent expansions (in place for three years or more) which increase school capacity by more than 25% or 200 pupils (mainstream schools) or 10% or 20 pupils for special schools.

2.3   For a prescribed alteration there must be a consultation on proposals, publication of formal notice of proposals, and a decision by the council whether to approve the proposals after consideration of public representations. In deciding whether or not to approve proposals, the council must have regard to statutory guidance. One of the factors to be taken into account is the need for school places and there is a presumption in favour of proposals to expand successful and popular schools to meet parental preference. The decision maker must also consider the effect on standards, including on other schools in the area and whether capital funds are available for the proposal to be implemented.

2.4   The council can propose a permanent increase in capacity for any type of maintained school, including foundation or voluntary schools, but must follow the statutory procedure. The governors of the school being proposed for expansion, and local diocesan authorities, are able to appeal to the Schools Adjudicator if they disagree with the decision of the local authority. The adjudicator is required to have regard to the same statutory guidance as the local authority in considering the decision.

2.5   The council is responsible for implementing proposals relating to community schools. For proposals at foundation or voluntary controlled schools, the proposals need to set out whether the council or the governors would implement them. The governing body has responsibility for implementation of proposals at voluntary aided schools, but the council has power to assist with implementation. Where the council assists by the provision of a site for a foundation or voluntary

school, the council must transfer its interest in the site to the trustees for the school.

2.6 Temporary expansions of schools by the addition of a reception class as an exception to the normal published admission number would need to be agreed by the admission authority for the school. For community schools, this is the council. For voluntary aided schools, this would be the governing body, and in voluntary aided schools it is for the school governors to decide whether to exceed the published admissions number or vary the school's admissions arrangements for a single year e.g. take a bulge class.

2.7 Officers confirmed that if a new school was to be established current legislation required a competition process to identify the provider. This provider could be, for example, a person or group seeking to establish a new school. The council could seek consent to bid itself in the process with a view to providing a new community school. If there were a number of bids, including one from the council, then the competition would be determined by the Schools Adjudicator.

2.8 The Education Act 2011 amends the legislation on new schools. Under the new provisions, if a local authority thinks that a new school needs to be established in its area, it must seek proposals for the establishment of an Academy. Alternatively, the local authority, with the consent of the Secretary of State, could seek bids for either an academy or a voluntary school to be provided. The local authority will only be able to publish proposals for a new community school (which is not a replacement for an existing school or schools) if it has invited proposals for a new academy.

2.9 Where there is not space to extend a school on its current site consideration can be given to expansion elsewhere, creating a "split site" school. Members were informed that this may be more efficient than creating a new, very small school on a new site.

2.10 The Task Group were informed that four of the current secondary schools in Merton had facilities provided under a grouped Private Finance Initiative (PFI) contract, and the school sites were leased to the PFI provider leading to complexities in managing building projects for expansion. Of the remaining four secondary schools, two are Voluntary Aided schools and two are Academies.

2.11 Members learned that Academies are not covered by the school organisation procedures as other schools are. Changes, including expansion, would need to be by agreement with the academy provider and the Secretary of State. The Department for Education (DfE) expects local authorities to consider fairly both their maintained schools and local academies in deciding where to use basic need funding and to provide additional places where they will be of greatest benefit to local children.

2.12 The Task Group heard that under the above route the Council would need to meet any capital costs, including land purchase, through its basic need allocation and the site would then be transferred to the Academy provider. Any applications would need to be approved by the Secretary of State.

2.13 Finally, Members learned that the Government was encouraging communities to propose new 'Free Schools' which had the same legal structure and requirements as Academies. In addition, applications for new free schools were invited annually by the Secretary of State. The Secretary of State has advised that a separate funding pot is available for Free Schools and that there have been examples of partnership funding from a supporting council.

3. Types of Schools

3.1 The Task Group were informed that all children in England between the ages of 4 and 16 are entitled to a free place at a state school. The most common types of school are:

- community schools: controlled by the local council and not influenced by business or religious groups;

- foundation schools: more freedom to change the way they do things than community schools;

- University Technical Colleges: specialise in subjects like engineering and construction and teach these subjects along with business skills and using IT. Pupils study academic subjects as well as practical subjects leading to technical qualifications. The curriculum is designed by employers who also provide work experience for students. University Technical Colleges are sponsored by: universities; employers; and further education colleges;

- Academies: run by a governing body, independent from the local council - they can follow a different curriculum. Some academies can receive/seek funding from sponsors, which may be businesses and faith or voluntary groups. Academies also received funding direct from the government as they do not receive funding from the local council. They're run by a governing body which employs the staff for the Academy. Academies also don't have to follow the national curriculum and can select pupils based on academic ability;

- grammar schools: run by the council, a foundation body or a trust - they select all or most of their pupils based on academic ability and there is often an entry exam;

- Special Schools with secondary age students can specialise in one of the four areas of the special educational needs (SEN) code of practice;

- City technology colleges are independent schools in urban areas that are free to go to. They're owned and funded by companies as well as central government (not the local council). They have a particular emphasis on technological and practical skills;

- Private schools (also known as 'independent schools') charge fees to attend instead of being funded by the government. Pupils don't have to follow the national curriculum. All private schools must be registered with the government and are inspected regularly;

- Studio schools: small schools - typically with around 300 pupils - delivering mainstream qualifications through project-based learning. This means working in realistic situations as well as learning academic subjects. Students work with local employers and a personal coach and follow a

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curriculum designed to give them the skills and qualifications they need in work or to take up further education;

- Faith Schools can be different kinds of schools e.g. voluntary aided schools, free schools, academies etc. but are associated with a particular religion. Faith schools follow the national curriculum except for religious studies, where they are free to only teach about their own religion. The admissions criteria and staffing policies may be different too, although anyone can apply for a place; and

   Free schools are funded by the government and are not run by the local council. They have more control over how they do things. Free schools can set their own pay and conditions for staff and change the length of school terms and the school day. Free Schools also do not have to follow the national curriculum.

3.2   Members were informed that since the Secretary of State has a separate capital pot for Free Schools, the funding available for local authorities is less. If the council were to have a Free School bid approved it could reduce our future basic need allocation as the capacity of all state funded schools is currently taken into account. However, if the Free School was meeting local school place needs it would clearly reduce pressure on the local authority basic need allocation.

4.   Secondary School Provision in Merton

4.1   Merton Council currently has 8 mainstream schools providing 1,699 year 7 places (55 forms of entry). This breaks down into the following:

- 2 Community Schools (1 mixed/1 girls)
- 1 voluntary controlled school (boys)
- 2 voluntary aided schools (both Catholic – 1 boys and 1 girls)
- 3 (in development) Academies (all mixed)
- 3 special schools providing approximately 35 year 7 places, plus 1 pupil referral unit.

5.   Demand for Secondary School Places in Merton

5.1   Members learned that the significant increase in demand for school places will begin to reach the secondary phase from 2015/16 and will mainly be met through existing accommodation. Significant build would be required thereafter and financial considerations would need to be made with regard to funding required from the Capital programme as basic need allocation is likely to be insufficient. An increase in demand would be most evident in 2018 based on current forecasts.

5.2   The Task Group heard that further to utilisation of all existing accommodation and surplus places, at least one new site would need to be found to ensure new provision could be offered in September 2018, however, this had not yet been built into the council's Medium Term Financial Strategy. This was due to uncertainty regarding the size, timing and cost of the build, as well as the lack of clarity regarding government funding at present. The Task Group heard that there are no easy solutions and that there is a need for greater regional partnership working with neighbouring boroughs in the South West sub region acknowledging the similar issues they face regarding demand.

5.3   With regard to special schools, officers explained that detailed feasibility work would need to be undertaken to determine sites, cost and existing arrangements that may be utilised at Merton schools. Members were also informed that the capital cost to refurbish Chapel Orchard for use by Cricket Green School would be met within the capital resources proposed in the 2012-16 capital programmes. The capital programme also included a sum for additional resourced provision within a mainstream school for pupils on the autism spectrum. However, more places would be required after 2016 for permanent additional special school places.

5.4   Members heard that the significant increase in demand for school places across the LB Merton area, which had required increases in capacity from primary school reception year in September 2008, with yearly rises until at least September 2014, would reach the first year of secondary school (year 7) in September 2015 and not peak until at least September 2021. An additional 20 to 30 forms of entry in secondary education were forecast to be required over the next 10-12 years, gradually increasing from 2015/16.

5.5   Whilst there are difficulties with long range forecasting, long range planning is required to provide sufficient school places within the next 5 years. Members heard that the following variables make fully accurate planning over the next 10 years challenging:
- Supply and demand of school places outside the borough;
- Changing parental preference, particularly with new provision being established;
- Changes to migration patterns; and
- Levels and location of housing development

5.6   The table below shows the total year 7 admission number is 1669 against a number on roll of 1454 in January 2013. Therefore there are 215 surplus places in Year 7. At nearly 13% this is more than the 5-10% recommended by the Audit Commission as being an appropriate balance between choice and efficiency (as detailed in policy during the 1990-1999).

	Admis. No Yr 7. Sep 2012 and 2013	Year 7 No. on roll Jan 13
Harris Academy Morden	180	95
Raynes Park High School	240	149
Ricards Lodge High School	240	238
Rutlish School	240	233
Ursuline High School Wimbledon	210	209
Wimbledon College	199	202
Harris Academy Merton	180	178
St Mark's Church of England Academy	180	150
TOTAL	**1669**	**1454**

5.7   Members learned that all 3 schools that are now Academies have admission numbers of 180 assigned but previously they had admission numbers of 240. Some of this accommodation is being used for 6th form provision but reverting to the previous admissions numbers would provide an additional 180 places (6 FE) and the surplus would stand at over 20%.

5.8 Members noted the changing retention rate at Merton State Funded Schools year 6 to 7 was as follows and that the expectation was that a combination of fewer places compared to demand in surrounding boroughs and additional quality provision within Merton would increase the retention rate back to previous levels:

5.9

2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13
88.5%	89.7%	88.2%	87.6%	85.5%	84.5%	79.2%

Members learned that the council needs to develop its secondary school places strategy to plan how this need will be met. The strategy was in development and would respond to:

• School size required;
• New school sites or expansion as the way forward;
• Alternative school models;
• Type of new school provision;
• SEN and PRU related issues;
• Opportunities for all schools from an expansion programme; and
• PFI schools, VA schools and Academies

Forecast

5.10 Members heard that the Council's proposals to meet the current and future demand are as follows:

There are 2 methods of forecasting: population catchment and pupil catchment

Population catchment projects pupil numbers against population projection, when pupil catchment project pupil numbers from existing school roll numbers. Pupil catchment has historically been more reliable for secondary school forecasting unless exceptional migration.

5.11 The impact upon the expansion need is based on:

• Pupil/parental preference;
• Supply from other Authority schools
• Independent sector supply; and
• Migration of residence (people moving in or out of the borough)

5.12 Members were pleased to hear that further work is to be undertaken on expansion, including with other Local authorities. In 2015/16 three or more schools would need to increase their year 7 admission numbers or there would be a shortfall. The deficit was due to increase gradually over the subsequent 3 years and there was likely to be a deficit of 8-12 forms of entry by 2017/18 and 18-22 forms of entry in 2018/19. Officers confirmed that the lead in time for planning to meet this increased demand was 3 and half years.

5.13 The Task Group heard that the Council needed to agree the principles for future school organisation with stakeholders and that the feasibility of expanding

existing schools would need to be explored with Head teachers and Governors. A further site search for new schools had been commissioned and would also shape the council's secondary school places strategy going forward.

Background to pupil projections for secondary school

5.14 Officers explained that one of the keys to projecting pupil numbers for LB Merton secondary schools was to understand the transfer from year 6 (the last year of primary school) to year 7 (the first year of secondary). While in primary school the movement across borough boundaries is relatively modest and tends to only be significant for schools close to borough boundaries, the position for secondary schools is more complex.

5.15 The transfer rate from primary to secondary (year 6 to 7) takes into account both factors, as well as pupil movement to independent schools. This transfer rate was 85.5% in 2010/11 and 83.4% in 2011/12. It dropped below 80% in 2012/13. It has therefore dropped steadily in recent years, being around 89% in the years 2004/05 to 2007/08.

5.16 Members learned that this drop may be because there has been a general drop in demand for secondary school year 7 places in the south west outer London area which meant that children were more able to obtain a place at a 'popular' school further away. For example, grammar schools located in LB Sutton have provided for a year-on-year increase in the intake of LB Merton resident children in recent years.

5.17 This is significant because the pattern may change as demand increases in south west London. In particular, 'import authorities' may not increase places to match the growth in their Local Authority region as they would not wish to pay for the capital implications of maintaining imports for other council areas. Officers highlighted that it is reasonable to consider that the retention rate may rise back to 90% or even 95% by 2020.

5.18 Members noted from the information above that there was currently significant spare capacity in year 7 but that this would no longer be the case in 2015/16. Spare capacity in years 8 to 11 in some schools would provide capacity in the short term, certainly in 2015/16 and 2016/17. However, issues of parental preference may impact, resulting in the need for temporary classroom provision. It was expected that significant additional buildings for September 2017 would be a necessity.

5.19 It was highlighted that the largest single year increase would be in 2018/19 (7 years on from 2011/12 where the council would need to provide space for 10 additional forms of entry in reception year 7 compared to the previous year).

5.20 Members learned that by 2021/22, the medium forecast was in the region of an additional 25 forms of entry (750 pupils in year 7, which is 3,750 pupils if it then continued to the 5 years of secondary school). A subsequent report based on 2013 information showed the issues accurately forecasting the required increase, and that planning between a broad range of an extra 20-30 forms of entry would be appropriate.

5.21   The Task Group found that by London standards most of LB Merton's secondary schools were on generous sites, and 6 of 8 schools accommodate on-site playing fields. However, following reorganisation most schools would be relatively large schools in terms of pupil numbers. With the new 6th forms, the 4 community/voluntary controlled schools already had a capacity for 1400 pupils.

5.22   Officers explained that with only 8 mainstream state funded secondary schools, if the strategy was progressed based only on school expansion, each school would need to expand by an additional 3 to 4 forms of entry (450 to 600 pupils across all year groups excluding 6th form). Since some schools may not be able to expand by 3FE e.g. the Catholic schools on more restricted sites, other schools would need to expand by more. This would mean the 1400 pupil schools growing to above 2000 pupil places, excluding the potential for additional 6th form places. A number of community schools feel they have restricted space and that any expansion will restrict capacity in some way.

5.23   Members noted that whilst this was a possibility, that schools of this size were not the council's preferred option, especially considering the potential impact on school playing fields. Such expansion would need to be carefully considered in the context of ensuring the size was not an impediment to raising school standards, whilst ensuring LB Merton schools remain a popular choice for parents.

5.24   The Task Group learned that, to ensure that the borough could meet its secondary school capacity requirements over the next 10-15 years that a new site for secondary school provision would need to be identified, preferably in the Colliers Wood area or a central area. This school would need to be operational by September 2018 for the first year of secondary school (year 7 pupils).

5.25   Based on the requirement for growth of 25 forms of entry by 2021/22 Officers had recommended to Members that 8 forms of entry be achieved through a new school (240 places per year, 1,200 places for pupils aged 11-16 in total), and that the remaining 17 forms of entry (510 places per year) be met through school expansion, with most schools providing an additional 2-3 forms of entry (60-90 places per year). However, discussions with head teachers showed that it could still provide some large secondary schools. This was alongside consideration being given to extra classrooms and split site provision where feasible.

5.26   Officers recommended that the requirement for a new site be considered alongside the council's wider regeneration strategy and 'Sites and Policies DPD'. Members agreed that given the significant land need for a 1,200 place secondary school (excluding 6th form) all sites should be considered, including larger primary school sites either as an all-through school or a transfer of sites.

Special school and specialist provision places

5.27   The Task Group heard that there is a need for further SEN (Special Educational Needs) secondary school places in mainstream schools, known as "additionally resourced provision" (ARP), and also for more specialist SEN provision. Demand will increase as a minimum proportionately in line with population growth.

5.28   Members heard that this had been acknowledged by Cabinet already and that Cricket Green School had been developed from a school for children with

moderate learning difficulties into a school for pupils with additional, complex and varied needs. Cricket Green School now supports pupils with autistic spectrum disorders, behavioural, emotional and social difficulties and physical disability providing extra places already, although further ARP would be needed for pupils with complex needs as part of the council's overall secondary strategy.

5.29   Members learned that with the implementation of this strategy, despite a rise of over 30% in entry to mainstream primary school over the past 5 years, primary aged school numbers at SEN schools have remained relatively stable. However, contrary to the general demographic stability/moderate decrease in LB Merton secondary school population over the past 5 years and needs have increased for SEN pupils with diverse needs. Officers explained that, as a result, to avoid costly out-borough placements, Cricket Green School had slowly increased its roll from approximately 130 to 145 pupils in 2011/12 up to year 11. Its official capacity is only 130 pupils.

5.30   The Cabinet agreement in 2010 for the school to accommodate the adjacent former doctor surgery on the site provided accommodation for post-16 provision, and relieved some of the accommodation pressures on Cricket Green, thus allowing the school to accommodate slightly above its capacity for pupils up to age 16, and 24 post-16 students, approximately 160 pupils in total.

5.31   However, the increasing need to accommodate pupils to avoid costly out of borough placements, and the growing population reaching secondary school age from September 2014, would mean that Cricket Green School would need to grow significantly in size. Members found that further planning work is required; including reviewing the specific relationship with mainstream provision and Perseid School, but it is likely that the school would need to grow to a capacity of up to 250 pupils within 10-15 years.

5.32   Officers informed the Task Group that, as part of its overall accommodation strategy, the council is looking to re-develop the adjacent Worsfold House and Chapel Orchard. The expansion of Cricket Green School and the review of Melrose School accommodation would need to be considered as part of this strategy. This had been acknowledged in the draft Sites and Policies Development Plan document put to consultation in January 2012 (site proposal 17).

5.33   Officers confirmed that the position would need to be reviewed as the growth in secondary school population accelerates and a consideration could then be made regarding the need for expansion. Members were pleased to hear that this could be accommodated upon existing sites. For example, the new upper school campus was designed with the possibility of future expansion. Any significant capital expenditure would be required outside the 2012/13 to 2015/16 capital expenditure period.

5.34   Members were also reassured that Melrose School had spare capacity for growth over the next five years, and, with its location adjacent to Worsfold House, and Cricket Green, its provision could be reviewed within this strategy.

6.   Meeting the demand for Secondary School Places – Capital Finance considerations

6.1   The sources of funding available to the council are:

- Basic Need Grant Allocation;
- Department for Education Maintenance Funding;
- Capital Receipts;
- Section 106 Developer Contributions; and because this would not be sufficient;
- Borrowing

6.2   Members considered the council's strategic financial position. The Task Group was informed that the settlement figure for the next two years was £14 million as the capital grant/basic need allowance for schools. This figure was slightly less than the funding received last year (2012).

6.3   The Task Group heard that there was a large demand for funding school places which would dominate the capital investment programme. Whilst the Local Authority would on recent expectations receive around £7- 8 million p.a. for funding a new school or expansion in grants, the rest would need to be found by the council.

6.4   The Task Group received a presentation from the Assistant Director for Resources on the finance methods available to local authorities for school building/expansion. The available methods outlined below were explored by the Task Group:

Government Grants

6.5   Although the council has some reserves, a significant proportion of these are required as "general Fund Reserves" to deal with risk and uncertainty. The additional earmarked reserves have been set aside for specific purposes and would not be sufficient to finance secondary expansion. This means that in addition to basic need grant allocation, borrowing will be required to fund school expansion/building would be needed to address this gap

6.6   Members were informed that the ability to fund the revenue cost of borrowing will be impacted as revenue grants are expected to decline and council tax may increase at less than inflation. The critical factor is the level of government grant available alongside other spending pressures

6.7   Officers explained that under Building Schools for the Future and PFI schemes there were a number of controls and restrictions had been placed on local authorities.

6.8   The current issue faced by councils was if they were able to set up a maintained school or if the provision of an Academy or a Free School had to be sought. The Education Act 2011 states that "if a local authority in England thinks a new school needs to be established in their area, they must seek proposals for the establishment of an academy". Funds for school can only be accessed in line with a particular model of school.

6.9   The Task Group was informed that the position for funding of academies is complex but there may be options for separate funding that could also reduce the cost to the council of establishing a new school.

Internal funding (capital receipts & revenue balances)

6.10   Members heard that unless government funding was available or substantial asset disposal could be made, the only other option would result in budget cuts to revenue budgets. This was problematic given that the council was already reducing budgets and making significant service staffing reductions. The redistribution of funds from other council departmental revenue budgets and from the capital programme would have a negative impact on council wide service delivery.

6.11   Officers informed the Task Group that there were no real difficulties in obtaining finance for a secondary school via conventional routes (prudential borrowing). The real issue was the impact on the revenue budget of charging the capital cost of the school over its useful life and having to repay the interest on any borrowing from revenue budgets. Financially the critical issue for the council was to minimise the capital cost that it would incur by considering alternative methods of funding at minimal cost to the council (mainstream government grant -basic need, s.106 or via other government funding sources such as those for free schools and academies) whilst recognising political considerations for the council and noting that the conventional funding available would be unlikely to fully fund a secondary school. This includes ensuring that a new school is built, or permanent expansion is undertaken only where there is a demonstrable long term need for it. If there is a short term "bulge" in pupil numbers that is not going to be sustained then lower cost more temporary solutions are needed.

Public Works Loans Board (PWLB)

6.12   Officers explained to the Task Group that the Public Works Loan Board appeared to be the best option should the council wish to borrow money to fund the schools expansion programme. This would currently be cheaper than any other source available.

6.13   Members learned that the cost to build a new school is around £40 million which would generate £2.5 million per annum in repayment costs against borrowing at the current Public Works Loan Board interest rates (standing at 3.3%). Other sources of borrowing or leasing from other sources would generate higher costs. There are few organisations active in the markets at the moment seeking to 'beat the PWLB rate' and it would be unlikely that such a product could be identified. It should be noted that in addition to the costs of borrowing to finance the project its capital costs have to be charged back to revenue over its useful life which could add a further £1 -1.5m p.a. to the revenue cost if no government funding were available.

6.14   The Task Group heard that Local authorities needed to consider associated costs, questions of flexibility and how any such borrowing would sit with the council's wider treasury management portfolio. The current market conditions meant that it was unlikely that the market could offer a product that was consistently priced below the PWLB at a level that also took account of the flexibility offered. Indeed by considering the loan as part of the wider package of borrowing an even lower PWLB rate may be possible.

6.15   The Task Group heard that the PWLB lends to local authorities long-term for capital purposes. The PWLB accounts for over 80% of all United Kingdom Local Authority debt, its lending arrangements are consistent with the 'Prudential' regime and PWLB will not refuse a loan application if it is within the Board's published terms.

Direct Bank Lending

6.16   Members were informed that these are generally not currently economic. It is more expensive for banks to raise funds than the Council can at the moment from PWLB (5yr PWLB maturity loan at the moment is 1.79%, while a 5 year PWLB EIP loan is 1.38%). A bank loan from the high street at the moment would be around 6% because it is more expensive for banks to raise funds.

Leasing (finance leases or operating leases)

6.17   This method of financing is not suitable for most capital program projects because of the high rates of return required on property investment and other investments, along with the lack of technical suitability of many other assets.

Lender Option Borrowers Options (LOBO)

6.18   The Task Group heard that LOBO's are an innovative solution providing alternatives to the PWLB. However, these are predominantly no longer being issued by banks. LOBO's are fixed rate loans with an uncertain maturity profile. The borrower agrees to pay a fixed rate but gives the lender the option on pre-agreed dates to change the fixed rate payable, the borrower then has to choose whether to accept the new higher rate or repay the loan in full at par.

6.19   Previously the motivation for Local Authorities entering into this transaction was that the rate was lower than PWLB, however, this was no longer the case. LOBO options and rate increases were typically triggered in a higher interest rate environment, if you had to repay and refinance it was typically into a higher interest rate environment. In the current economic environment, LOBO's are rarely issued by banks because funding spreads have increased significantly for banks.

Capital Markets (Bond Issuance)

6.20   Local Authorities have the power to issue bonds and have historically done so. The Task Group heard that the Housing Revenue Account Reform replaced the present Housing Revenue Account Subsidy system with a self-supporting system under which there would be no on-going support from central government. This re-ignited interest in bonds. The new annual housing revenue account subsidy system commenced from 28 March 2012 and meant that local authorities with housing stock on 28 March either paid the government or received from the government in order to exit the current subsidy system. For local authorities that were to pay the government it meant that thought had to be given to the cost of loan. Implementing HRA self-financing was a key plank of the Government's Localism agenda.

6.21 The government announced on 18 September 2011 that Local Authorities would be loaned PWLB loans for the HRA transaction. The government offered a one day discount for local authorities needing a loan to buy themselves out of the HRA at considerably lower rates. Councils were better off as a result of this move. This also meant that the appetite for bond issuance became nonexistent.

Challenges Faced by Local Authorities in the Bond Market

Challenge	Explanation
Withholding Tax	• When Corporates issue listed bonds they benefit from the quoted Eurobond exemption, which allows them to issue bonds that pay interest on a gross basis to investors. • LA's on the other hand do not currently benefit from this exemption, and are therefore required to pay coupons net of withholding tax, unless they verify the identity of each investor prior to the coupon payment date • The solution most commonly proposed is for LA's to create and maintain a financial subsidiary whose obligations are guaranteed by the authority. A solution which adds unnecessary complexity.
Benchmark Size	• Most LA's have financing needs that don't meet the bond markets benchmark size of c. £250m • Bonds that do not meet this minimum size criteria price at a premium, as they attract less interest from investors
Credit Rating	• Majority of LA's cannot justify the cost in terms of time, effort and resource of procuring and maintaining a public credit rating unless their funding requirement is sufficiently large. • Bond investors demand a premium for bonds that are not rated by a credit rating agency because of the additional risk they stand to take.
Documentation	• Most LA treasury team do not have the staffing resource to negotiate, create and maintain standard bond market documentation leading to additional costs

6.22 Members learned that the alternatives for Local Authorities in the Bond Markets were limited, once again, due to the cheaper credit available from the PWLB. Capital Market Bonds are only viable on a scale greater than Merton's immediate needs. A bond on the scale required would seriously unbalance the council's debt portfolio. In addition, the interest rate required by the market was likely to be somewhat above the PWLB rates. This meant that there was no incentive to look elsewhere for funding at present.

Lending from other Authorities

6.23 There is some activity here but it has tended to be at the shorter end of the yield curve.

Retail Bonds (Stock Issuance)

6.24 The Task Group was informed that the cost of issuing bonds and administering loans was high and it was not self-evident that, in the present market, such an approach was needed. Bonds still have to be repaid and, unless they result in lower interest costs, it is not clear that they would enable more capital expenditure.

6.25 Although Retail bonds would be a way to access private investors, and allow individuals to invest in their localities at the moment UK gilt yields are at historic lows as a result of both demand for safe investments and quantitative easing. The PWLB rate is currently very low, which weakens the prospect of bond finance providing cheaper credit. Councils who have also qualified for the 'Certainty rate' receive 0.2% less on the PWLB rate when they want to borrow. In addition, the government has announced that a 'Scrutiny rate' is also to be introduced bringing further reductions to the rates at which Council's borrow with the PWLB.

6.26 Retail bond buyers typically target a return of around 5.5% irrespective of current gilt yields. This is rather high compared with long-term PWLB rates around 4.30% for a 50 year loan.

6.27 Another issue the Task Group heard is with the associated transactional costs and administrative burden which may well off set any savings made on the PWLB rate especially for smaller issues where fixed costs represent a larger proportion of the capital raised.

6.28 Finally, Members were informed that retail bonds tend to be for a relatively short period and for low amounts which do not match the financing period and funding requirement of a school.

6.29 Members considered the factors that also influence decision to borrow from external sources. These issues were as follows:

- Does the Authority have any other debt portfolio objectives?
- Are there urgent short term budgetary pressures to fund savings?
- Is the average rate of interest on the existing debt portfolio viewed as being too high and is it out of line with other peer authorities?
- Is the existing maturity profile of the debt skewed in a way that needs remedial action?
- If a bond is being considered then will the capital project have a long term income stream to finance the bond?
- Is borrowing the most best /cost effective option?

7. Alternative funding streams

7.1 The Task Group explored a range of public and private sector options to fund the necessary additional forms of entry being aware of the impact of the current financial climate and sought advice from the Assistant Director of Resources and external bodies and organisations to consider the options available. These included:

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Options for disposal of council assets

7.2   The Task Group was informed that there had been constant attempts to release funds from assets but that some were difficult to dispose of. Equally it was difficult to plan without any certainty of a receipt. However, capital gains through asset disposal were a potential contributor to raising funds for school expansion. Members heard that there is an asset disposal list in place already. The Task Group explored the assets available to the Council that might be of interest to third parties to invest in with a view to enabling expansion and for demand to be met.

Finance/Sponsorship by the Co-operative movement

7.3   Informal discussions were held with the Public Sector Division of the Co-operative Bank. They indicated that at this stage they were not intending to become involved with the promotion of any further schools. They also indicated that they were not actively interested in long term lending for major local authority capital projects, primarily because of the long period over which loans would be sought and the interest rates that Local Authorities could obtain from the PWLB.

Public use of assets

7.4   The Task Group considered sponsorship opportunities for new assets (for example car parks or leisure centres) which could be run commercially from the school estate (using PWLB funding and granting 50 to 100 year leases to commercial organisations). Use of the facilities could also be made available on that land to local and co-located schools. These assets would generate an income stream for the Council. The council revenue generated would cover the cost of the PWLB loan interest. The council would retain the freehold of the plot.

Dual use of schools

7.5   Members discussed facilities for a Business Incubation Centre, for example, that would offer up to date technology and reduction in business rates to new businesses coming into the borough – taking advantage of government regulation changes in regard to business rates.

7.6   These links could be made in the form of Knowledge Transfer Partnerships with local universities. Schools would have a building they could use. The council would offer a 50 year lease and again the council would retain the freehold and share in the profit to further offset the PWLB interest rates. Moreover, offices could be used for classrooms, staff training, meetings, work experience, project work between pupils and businesses etc. Many examples of assets that can be of use to the host school and the public, whilst enhancing the value of the council's portfolio and generating an income that will contribute to covering the interest rates for any borrowing that may be required, could be found.

8.   Land availability and planning assumptions

Required site area for a school

8.1   In the mid-2000s the DfE published guidance on the land and space required for schools, titled "Building Bulletin 98 - Briefing Framework for Secondary School

Projects" and "Building Bulletin 99 - Briefing Framework for Primary School Projects". These are not statutory guidelines, and are not official guidance documents of the present government, who wish to see innovative solutions, but they provide the most authoritative guide, based on research, of the required site for school.

Availability of sites

8.2   Members were informed that there were not many sites available for expansion/building; however, the authority had commissioned two studies to look at the available land and the feasibility of building or expansion. Sites needed to be identified by end 2013 (1 school) as there was a 3 and a half year lead in time for development. However, sites needed to be identified within 12 months to enable provision to be made to meet the projected demand for 2015/16.

8.3   Members were pleased to hear that a review had been commissioned by the Children, Schools and Families department to establish what sites were available (land audit) and the feasibility of expanding or building secondary school provision on these sites. The findings of these two studies were not available for the Task Groups consideration as they were in progress at the conclusion of this review. Members wished for the findings of the commissioned studies to be considered alongside the findings of this review.

Capita Symonds Review – Site selection options for the provision of secondary school places (July 2013)

8.4   The Task Group considered the findings of a review commissioned by Merton Council to establish suitable sites to met demand for secondary school places. This report would form an evidence base for future considerations and proposals that would be taken though the appropriate decision making channels in due course.

8.5   Members heard that, as forecasts predicted a deficit of secondary school places by 2015-16 based on current admission numbers, the review produced a short list of sites based on the following criteria:

    1.   Site location within study area;
    2.   Site area – adequate size and ability to support key education drivers;
    3.   Site suitability;
    4.   Develop and enhance existing school sites (e.g all through school solution);
    5.   Availability – are the sites owned by the authority or on the market and is acquisition cost effective?;
    6.   Environmental considerations – some sites are within recognised flood zones;
    7.   Physical considerations – potential highways matters, neighbourhood concerns and student safety;
    8.   Proximity to existing established schools;
    9.   Sites subject to on-going development; and
    10.   Conflict with established planning policy

8.6 Members were informed that such consideration needs to include an assessment of the educational practicalities and the impact of introducing a new element of provision in the borough, be it part of a single site or split site provision.

9. Consultation

9.1 Members of the Task Group consulted with the following stakeholders to gauge their views on how the Local Authority might best meet demand for secondary school places in the future. Members asked for comments on the size, location (including split sites), maximum pupil numbers, type of school (Free School, Academy etc.) and age groups (for example, 5-18 years of age) that may be taken forward for consideration in terms of thinking about what secondary school provision might look like and if the local authority should expand current sites or build a new school.

Secondary Heads Group

9.2 Alison Jerrard consulted with her colleagues on the Secondary Heads Group and informed them of the work that the Task Group was undertaking, its remit and the decision making process that would follow once recommendations had been made by the Task Group. The Secondary Head Teachers made the following comments:

- SEN provision needed to be considered in this process;

- Further to site searches and feasibility studies looking at the expansion of existing schools, Head Teachers wished to be consulted with the business cases for sites;

- Consultation should be undertaken with Governors in relation to Academy proposals and the rights of schools to reject proposals the council may make;

- Questions were raised about building upon green space if the council could not expand current school sites;

- Split site provision could be considered;

- The feasibility study and land search outcomes should be presented for consideration to the Secondary Heads Group as soon as possible for discussion;

- Concerns were raised regarding the timescales for building work – Head Teachers felt that schools should be informed at least one year prior to commencement of works to enable schools to plan with regards to additional accommodation;

- The feasibility of expansion of academies was asked to be undertaken first in the councils strategy for expansion;

- There was a need for on going consultation with stakeholders and contributions from governing bodies; and

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- It was important to seek parents' views throughout.

9.3 The Task Group agreed that there was a need for the involvement of secondary heads in the development of secondary school provision and for diversity in choice of educational provision in the borough. Members felt that the involvement of secondary head teachers would ensure that an educational vision was established prior to Cabinet agreeing any proposals and that branding and marketing was key to demonstrating standards and quality to generate parental confidence.

School Governors

9.4 Members queried what the responses of the governing bodies had been and what consultation programme there was with schools. The Task Group heard that consultation with schools was being undertaken and workshops had been held with head teachers. The council were also working in partnership with schools. Getting Governors' involvement was crucial as the Council did not wish to impose expansion upon schools.

Youth Parliament

9.5 Members of the Task Group met with members of the Youth Parliament to seek their views to ensure that the perspective of young people in secondary or sixth form education was represented in the final report and reflected in the recommendations made to Cabinet. The following comments were made by the Youth Parliament:

- Having provision from 5-18 years of age would enable consistency and friendships with peers and relationships with staff to develop and for the provision of education to be more responsive, knowing students over longer time periods;

- Concerns expressed about having 5-18 years of age schools which may result in younger students being intimidated by the older students being there – or alternatively children may feel safer having older children around;

- Sometimes change is welcomed by students who may not have had the best experience and wish to move on to another site or college to enable them to progress;

- There are issues with the time consuming nature of travelling between sites for college – would prefer not to have split site provision;

- Large/single site would be better;

- Rather have time to do work/more productive than travelling to other sites

- Happy to receive classes for certain age groups all on one site;

- Mixed gender and mixed race schools are positive;

- Issues with offering home schooling as social skills do not develop – there are also potential behavioural issues if not mixing with other children;

- Can Head Teacher control larger numbers if schools are expanded; and

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- Where are open spaces for these schools? If they are expanded will this mean there are no open spaces for children to play in? This will result in young people having less space to socialise and therefore impact on concentration levels if we can't have a proper break.

10.   Benchmarking – Kingston and Richmond

10.1   Members invited the Head of School Place Commissioning covering the Royal Borough of Kingston upon Thames and London Borough of Richmond upon Thames local authorities to present their approaches to meeting the demand for secondary school places. The Task Group chose to explore the innovative approaches undertaken by other local authorities.

10.2   Members learned that at Kingston there are 10 secondary schools in Kingston, nine of which have converted to academy status.

10.3   Matthew Paul informed Members that Secondary school place planning within the Royal Borough of Kingston had, until August 2012, been undertaken on a whole borough basis, rather than on an individual school basis.

10.4   Members learned that the forecasts indicated that three additional forms of entry would be required in September 2015; up to five by 2016; up to eight by 2018; and up to 17 by 2020. Several strategies were being undertaken to ensure that sufficient places would be provided:

- Amendment of the methodology for measuring home-to-school distances in order to maximise the number of in-borough children securing places at oversubscribed in-borough schools;
- Encouraging and assisting schools to expand;
- Encouraging and assisting free school proposers, so that their proposals can be of the most benefit to the local community and to ensure that, if approved for opening, the schools would play a full part in the local family of schools. Members heard that one bid had been submitted for a 2014 opening, from Kingston Educational Trust (a combination of Kingston College, Kingston University and Education Kingston, the school-to-school improvement service run by the Council in conjunction with local schools), for a six-form entry secondary school in North Kingston; and
- Keeping a close eye on developments in neighbouring local authorities, by meeting and talking regularly with officers in those authorities.

10.5   Matthew Paul also provided an overview of the secondary school places and demand in Richmond. There are eight secondary schools in Richmond, with a ninth, a Catholic school, due to open in September 2013. Three of the existing schools are sponsored academies and four are convertor academies.

10.6   The Council uses similar strategies to those in Kingston to ensure that capacity will meet demand. However, it was noted that the importance of knowing, as early as possible, what is being planned in neighbouring areas was key, as a decrease in the number of out-borough residents seeking and obtaining places in schools within the borough would provide a first cushion against rising in-borough demand.

10.7 The Task Group heard that both councils actively seek and work with free school proposers so that, where possible, any proposals fit their 'basic need' requirements. That relationship entails close liaison with planners, corporate property and EFA colleagues to investigate which sites might be available, and, if Council-owned sites, might be leased for free school use on a 125-year peppercorn-rent basis.

10.8 Members asked about the importance of partnership working. Matthew Paul explained that, initiated by the Council's School Improvement Team, the Kingston Education Trust was set up in partnership with Kingston College and Kingston University and with the support of local schools. Members asked about Councillor involvement in the partnership and were informed that Councillors were actively supportive. Members were informed that the secondary sector better lent itself to sub regional approaches and that working relationships with other local authorities was key.

10.9 Members enquired about the Free School application at Kingston. Matthew Paul explained that the DfE appeared to be sympathetic to a Free School application which was backed by the council. However, it was highlighted that there would need to be some caution exercised in this approach as the DfE may view this as a way to circumvent standard grant processes to generate greater income for school expansion and development. It was confirmed that the start-up costs would have to be funded from the DSG.

10.10 Matthew Paul explained that Kingston and Richmond viewed Free Schools as positive and a productive way to ensure new schools and sufficient places to meet demand in the future.

10.11 The Task Group asked about the quality of teachers and admissions procedures in local authority supported Free Schools and what say the Local Authority would have in these areas. Members asked if criteria could be set in advance of the application by the Local Authority in consultation with the partners approached for the project. Matthew Paul added that this might be a possibility.

10.12 Members were informed that, despite having not located an appropriate site in Kingston as yet, an application for a Free School had been made to the DfE.

10.13 The Task Group also discussed the approach taken by Richmond in purchasing a site with a view to the site being used potentially for a school. This became a Faith School further to a proposal from the diocese which was then considered in a lengthy debate and subject to full consultation. A school was now on this site and had contributed to meeting demand. The diocese had also raised funds separately for building and refurbishment.

10.14 Members queried the rights the Local Authority had in this instance. Matthew Paul explained that the council were unable to specify terms as this would be going down the route of competition. Competition was not allowed due to the school being voluntary aided. The power for the Local Authority lay in their ownership of the land.

10.15 Councillors considered the feasibility of the purchase of a site in Merton and if there was a possibility of approaching the churches to discuss putting forward a proposal. However, this would lead to questions regarding balance of faith

schools in the borough and the capital for development of this solution would still have to be found within the basic need allocation. The council's Capital programme would be impacted significantly should this be taken forward. Members also considered the possibility of a split in terms of funding a new school between the council, school and church.

10.16 The Task Group considered bulge schools and classrooms and whilst this strategy had been adopted in meeting demand for primary school places, officers advised that it would be a more strategic approach to put a new school in place rather than bulge classes.

11.   Site Visit – George Abbot School Guildford

11.1   Alison Jerrard, co-opted Member of the Task Group, visited George Abbot School in Guildford to gather information and perspective on the operation of schools with large pupil numbers, and to seek best practice on how to meet demand. The school consisted of 5 year groups of 300 each plus 6th form numbers of around 400 pupils. The following points were noted by the Task Group:

- Vision needs to be clear so everyone feels a part of such a big environment;

- Need for social and canteen space evident….at George Abbott School each year group had its own playground and as they had low numbers of FSM and therefore didn't need a big canteen as most had packed lunch. Year 7 had their own block;

- Size of school provided a lot of opportunities for developing leadership capacity at all levels e.g. in depts. and year teams where Heads of Department and Heads of Year were effectively running their own mini schools with 25+ staff, as well as in the SLT where accountability was very high. Lots of flexibility in the timetable to group students in many different ways;

- The strength of leadership enabled the school to go for lots of opportunities e.g. Teaching School as they have the capacity to cope with the demands;

- Strong policies and structures in place at all levels e.g. for staff and students to ensure consistency;
- As a result of local circumstances, an Executive Head is in place at the school creating capacity for additional support fro strategic thinking;

- Some parents were concerned about transition that a big school might swamp their child…transition process key;
- Creative approach to the use of space;

- Constant work with local residents to ensure impact on community is minimal in terms student movement;

- Need to consider context….George Abbott School had low Free School Meals and low Special Educational Needs pupils; and

- Accommodation seemed to be very well used.

11.2   Members considered the issues raised and felt that going forward Merton needed to take from this visit the need to consider the practicalities of any new building or expansion, as well as the physical environment and its impact upon pupils. With regard to leadership and the Executive Head teacher post at the school, Members felt that strong leadership and support from head teachers to existing schools and new schools in the borough was crucial.

12.   Concluding remarks

12.1   The Task Group sought to undertake an in-depth review of the council's response to meeting demand for secondary school places now and in the future, considering it as a priority area and exploring the planning being undertaken, the options available to the council, the financial restrictions and possible funding streams and the impact on schools, parents and pupils. The council have, and will continue, to engage schools and parents in the development of proposals for future school provision to ensure a co-operative working environment and mutual agenda between the local authority, parents and schools. The Task Group's findings and recommendations, as outline above, seek to provide solutions to the difficulties presented in meeting demand for secondary school places, acknowledging the barriers faced by local councils and the excellent work already being undertaken by the council's Children, Schools and Families Department in this area.

13.   What Happens Next?

13.1   This task group was established by the Council's Overview and Scrutiny Panel, and so this report will be presented to its meeting on for the Panel's approval.

13.2   The Panel will then send the report to one of the Council's Cabinet meetings early in the next municipal year for initial discussion.

13.3   The Cabinet will be asked to provide a formal response to the Panel within two months.

13.4   The Cabinet will be asked to respond to each of the task group's recommendations, setting out whether the recommendation is accepted and how and when it will be implemented. If the Cabinet is unable to support and implement some of the recommendations, then it is expected that clearly stated reasons will be provided for each.

13.5   The lead Cabinet Member (or officer to whom this work is delegated) should ensure that other organisations to whom recommendations have been directed are contacted and that their response to those recommendations is included in the report.

13.6   A further report will be sought by the Panel six months after the Cabinet response has been received, giving an update on progress with implementation of the recommendations.

Appendix 1 - Whom we spoke to

<u>**Officers:**</u>
Paul Dale
Paul Ballatt
Tom Procter

<u>**Cabinet Member:**</u>
Cllr Martin Whelton

<u>**External Witnesses:**</u>
Matthew Paul, Head of School Commissioning, Kingston and Richmond
Secondary Heads Group
Youth Parliament
George Abbot School Guildford

Appendix 2
Equality Impact Assessment (EqIA)

This form should be completed in line with the Equality Impact Assessment guidance available on the	

EqIA completed by: (Give name and job title)	Rebecca Redman, Scrutiny Officer
EqIA to be signed off by: (Give name and job title)	*Julia Regan, Head of Democracy Services*
Department/ Division	**Corporate Services, Democracy Services**
Team	**The Scrutiny Team**
EqIA completed on:	***21 August 2013***
Date of Challenge Review (if you have one):	**N/A**
Date review of this EqIA is due **(no later than 3 years from date of completion):**	**TBC**

1. What are you assessing? **(Tick as appropriate)**

✓ *Policy: A policy is an adopted approach by the Council to a specific issue or position, usually in the long term. It provides a set of ideas or principles that together form a framework for decision making and implementation.[1] A policy may be written or unwritten, formal or informal. For example, the Corporate Equality Scheme.*

☐ *Strategy: A strategy sets out the activities and actions that have been identified as most likely and cost-effective to achieve the aims and objectives of a council policy e.g. the Consultation Strategy.*

☐ *Procedure: A procedure sets out the way in which practices and actions are to be undertaken at an individual level in order to achieve the policy in local situations, for example using a flow chart approach. Procedures also outline who will take responsibility on a day to day basis for decisions in the implementation of the policy.[2] For example, this procedure for carrying out an EqIA.*

☐ *Function: A function is an action or activity that the Council is required to carry out for example emergency planning arrangements.*

☐ *Service: A service is a facility or provision made by the Council for its residents or staffs for example the Library service or Translation service.*

2. Title of policy, strategy, procedure, function or service

A Scrutiny Review undertaken by scrutiny councillors on the Children and Young People Overview and Scrutiny Panel (supported by the scrutiny officer).

3. For functions or services only: Does a third party or contractor provide the function or service? If so, who?

No

4. Who is the policy, strategy, procedure, function or service intended to benefit?

Parents, pupils and schools in Merton

5. Who else might be affected?

-

6. What is known about the demographic make up of the people you have included in your answers to questions 4 and 5?

Data held by department on demographic make up of schools and pupil base

7. Have you already consulted on this policy, strategy, procedure, function or service? If so, how?

Yes – as part of the scrutiny review process – through attending witness sessions and hearing first

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[1] See the Council's Policy Handbook http://intranet/policy_handbook_final_agreed_nov_07-2.doc
[2] As above

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hand evidence. The review was conducted from September 2012 – August 2013 by the Scrutiny Team and the outcomes of consultation and witness sessions are included in the review report.

8. How will you measure the success of your policy, strategy, procedure, function or service?

Once the review report has been approved, an action plan will be drawn up to take forward the agreed recommendations. Implementation of the action plan will be monitored at regular intervals by the O&S Panel and Cabinet.

9. How often will the policy, strategy, procedure, function or service be reviewed?

The review report will result in an action plan, to be monitored probably six monthly by the scrutiny panel.

10. When will the policy, strategy, procedure, function or service next be reviewed?

Once the action plan has been agreed, progress is likely to be reviewed on a 6 monthly basis

11. Please complete the following table and give reasons for where:
   (a)   The policy function or service could have a positive impact on any of the equality groups.
   (b)   The policy function or service could have a potential negative impact on any of the equality groups.

Think about where there is evidence that different groups have different needs, experiences, concerns or priorities in relation to this policy, strategy, procedure, function or service.

Equality group	Positive impact		Potential negative impact		Reason
	Yes	No	Yes	No	
Gender (inc. Transgender)				✓	
Race/ Ethnicity/ Nationality				✓	
Disability				✓	
Age				✓	
Sexual orientation				✓	
Religion/ belief				✓	
Socio-economic status				✓	

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12. Did you have sufficient data to help you answer the above questions?

✓ **Yes**

☐ **No**

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If there is a potential negative impact on one or more groups, or there was
Insufficient data to help you answer the above questions, you should complete a full EqIA

13. Is a full Impact Assessment required?

☐ **Yes**

✓ **No**

EqIA signed off by:	Julia Regan, Head of Democracy Services.
Signature:	
Date:	

Committee: Children and Young People Overview and Scrutiny Panel

Date: 17 September 2013

Agenda item: 7

Wards: All

Subject: **Adoption Service Update report**

Lead officer: Paul Angeli, Head of Social Care and Youth Inclusion

Lead member: Councillor Maxi Martin

Forward Plan reference number:

Contact officer: Sarah Daly, Service Manager, Looked After Children, Permanency & Placements – email: sarah.daley@merton.gov.uk, tel: 020 8545 4658

Recommendations:

A. That CYP Panel consider and comment on the data and action in Merton's Adoption Service and through their scrutiny role support CSF departments continuous improvement plans.

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1   PURPOSE OF REPORT AND EXECUTIVE SUMMARY

1.1.   To provide the Children and Young People Overview and Scrutiny Panel with a report on the regulated service area of adoption. To set out the activity in the year 2012-13 and to share details of the action plan in place to respond to areas for further development.

1.2.   To receive feedback from members on progress and action to assist with CSF's commitment to continuous improvement and for the Panel to execute their scrutiny function.

2   DETAILS

2.1.   **Remit of the Adoption and Permanence Team**

The role and functions of Merton's adoption agency are set out in statutory regulations. In summary the main purpose and functions of the Adoption and Permanence Team are:

- To family find for 'looked after' children for whom the Permanence Plan is long term fostering;
- To work with the children's social work teams to match looked after children with suitable permanent families and develop appropriate support plans;
- To recruit, assess, prepare and support domestic adopters who will match the needs of the children awaiting adoption;
- To provide assessments of inter-country adopters living in Merton (Merton have a service level agreement with the Inter Country Adoption Centre);

- To provide court reports in adoption proceedings, both for non-agency proceedings (e.g. step-parent) and for children 'looked after' by the Local Authority;
- To provide advice on adoption and permanence issues to other professionals;
- To provide a post adoption support service;
- To provide a support and counselling service for birth parents including parents relinquishing children for adoption;
- To complete viability assessments of permanent carers and special guardianship agreements in court proceedings, and the associated support plans.

2.2   The inspection framework ensures that the agency is complying with the regulatory framework.

2.3   The service sits in our Children's Social Care and Youth Inclusion division alongside our services to support and improve outcomes for looked after children including finding permanent stable homes.

2.4   The performance of the service is reviewed monthly at CSF DMT and in depth reports on the specific regulatory requirements go to DMT on a quarterly basis. The services performance indicators are also reviewed by the Merton Safeguarding Children's Board and our Corporate Parenting Advisory Group in line with Ofsted's governance requirements on the service.

2.5   The next sections of the report detail progress on some of our key areas of work over the last year and also priorities looking forward.

3   Progress Update

3.1   Adopter Recruitment

The recruitment strategy for the year has been a combination of general advertising for adopters and permanent carers as well as specific advertising for Looked After Children needing placements. General advertising has focussed on dispelling myths in adoption relating to who can adopt in order to encourage a more diverse range of applicants. The challenge is for Merton to have Merton adopters available who can be matched with Merton children at the time that their plans are such that they can be matched with an adoptive placement.

3.2   Achieving Permanence for Children

The Government will continue to monitor timeliness through review of annual returns and the adoption scorecard process. The adoption scorecard initial focus is on local authorities and the adoption process for children (this will develop to include data on timeliness for prospective adopters from 2014). The scorecard currently reviews 3 measures: All three indicators are published as a three year rolling average performance. The application of rolling averages has a significant impact on the current statistics as historical practice continues to impact on "current" score and likely future scores whilst previous years remain in the average.

1. A1 - The average time it takes for a child who goes on to be adopted from entering care to moving in with his or her adoptive family.
2. A2 - The proportion of children who wait longer for adoption than they should (includes those currently 'waiting to be adopted').
3. A3 - The average time it takes for a local authority to match a child to an adoptive family once the court has formally decided that adoption is the best option.

3.3 **A1 - The average time it takes for a child who goes on to be adopted from entering care to moving in with his or her adoptive family.**

3.4 Year on year we are able to demonstrate a trend of improvement in the A1 indicator, save for 2011/12 during which period a greater number of children were adopted.

A1 - Average time between a child entering care and moving in with it's adoptive family, for children who have been adopted (days). Single year performance.

Year	Value
2008/2009	1330
2009/2010	862
2010/2011	681
2011/2012	807
2012/2013	467
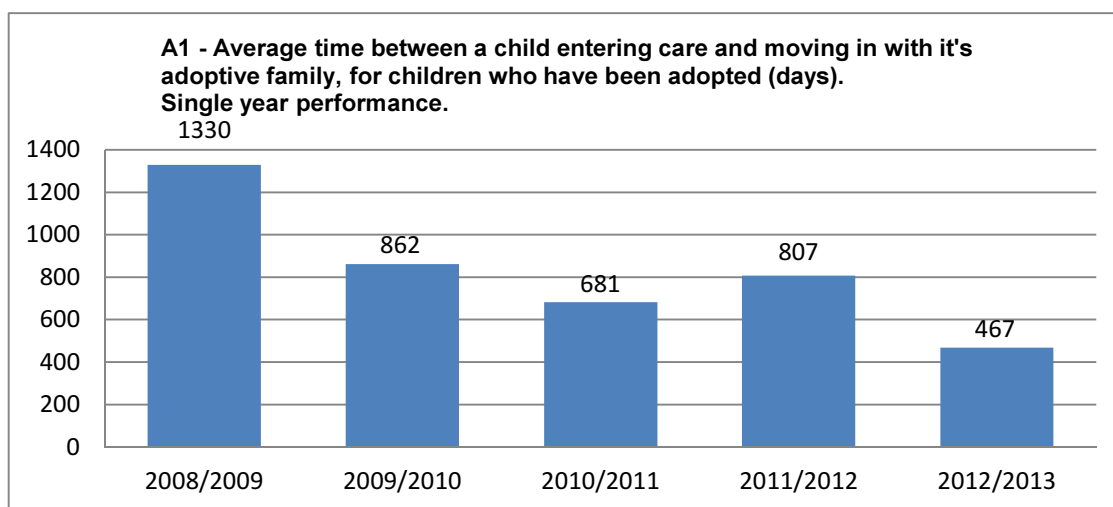
3.5 Numbers of adoptions made

Year	Number of CYP adopted
2008/2009	5
2009/10	2
2010/11	5
2011/12	9
2012/13	5

3.6 The London Borough of Merton is committed to considering adoption for children requiring a permanent placement outside of their own family and this includes those with the most complex needs.

3.7 In 2012/13 the London Borough Merton had 5 children who had adoption orders made. Of these 5 children 2 took longer than the average time to be matched for adoption once the court had formally decided that adoption was the best option. Whilst 2 children did fall outside of the target timescale they were not significantly delayed (one took an additional 56 days, and the other an additional 32 days) despite both children having additional needs which

needed to be catered for in any match. Factors which are likely to cause delay include:

- Birth parent appeal at key stages in the process
- Complexity of the child's needs (eg disability)
- Sibling groups)

Five children adopted 2012-13

A1 - Average time (days) between entering care and moving in with adoptive family, for children who have been adopted (days).

Child	Days
Child 1	231
Child 2	235
Child 3	617
Child 4	752
Child 5	501
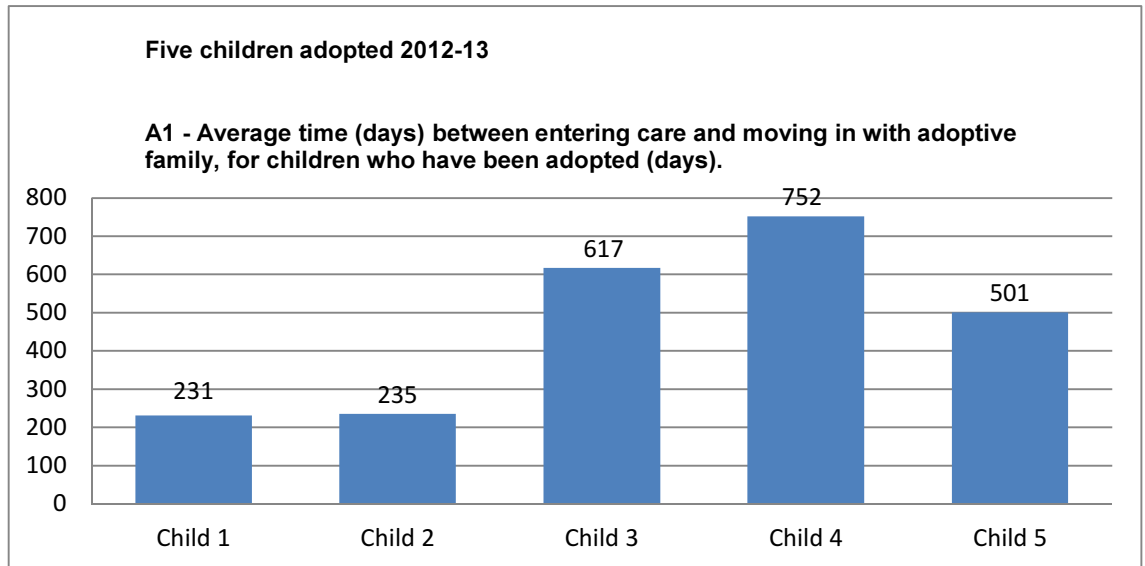
3.8 Despite the challenges of small cohorts and complex cases our three year rolling average 'A1' indicator shows improvement. For 2010-2013 Merton's A1 performance was 684 days, the national average for 2009-2012 was 636 days.

A1 - Average time between a child entering care and moving in with it's adoptive family, for children who have been adopted (days). Three year rolling average performance

Period	Days
2008-2011	981.7
2009-2012	774.6
2010-2013	684.0

3.9 **A2 - The proportion of children who wait longer for adoption than they should.**

3.10 The matching process for those children with additional/complex needs can be a lengthy one, and as a result London Borough Merton has seen some individual cases impact significantly on the A2 indicator. Additionally it is of

note that Merton is working with a small cohort in terms of adoption and therefore since the A2 indicator measures the average time for the process a small number of children experiencing delay will distort the reported figure.

3.11   Year on year however we continue to demonstrate and improvement save 2011/12.

A2 - Average time between a local authority receiving court authority to place a child and the local authority deciding to match to an adoptive family (days) Single Year performance

Year	Days
2008/2009	50
2009/2010	324
2010/2011	203
2011/2012	332
2012/2013	178

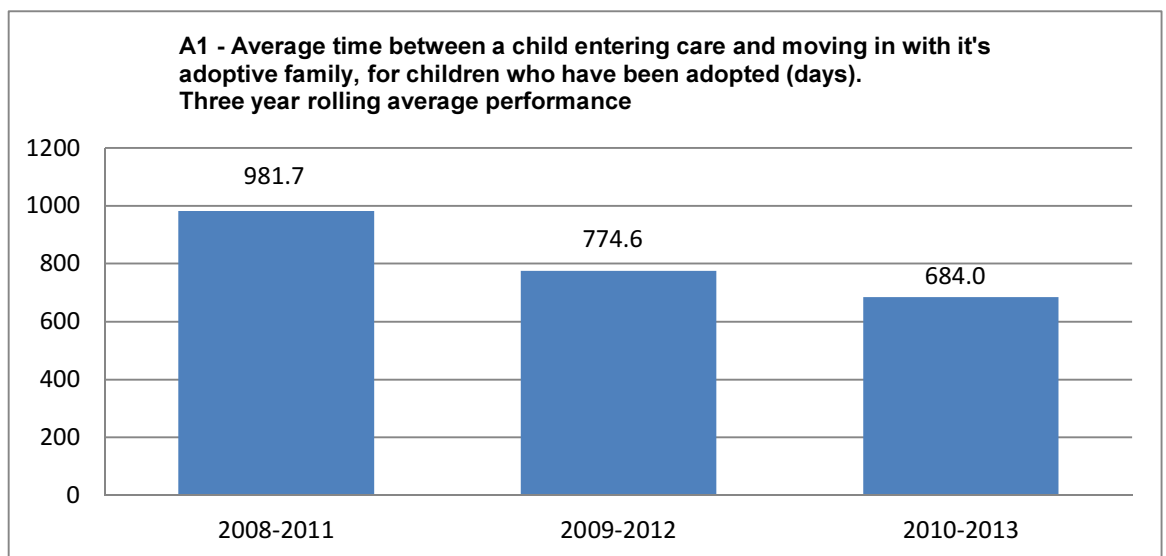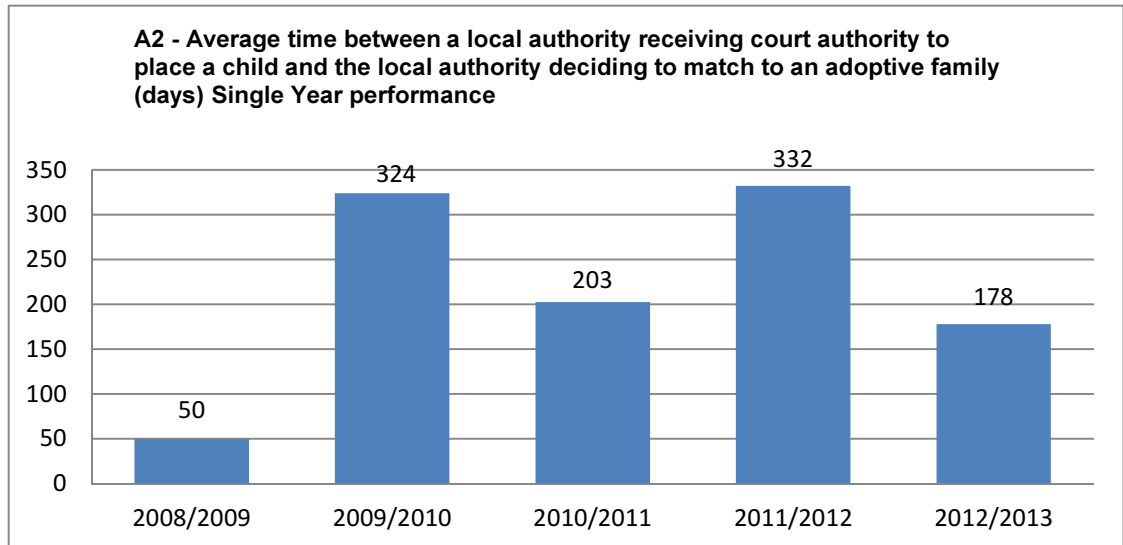3.12   In the year 2012/13 London Borough Merton had 5 children who had adoption orders made. Of these 5 children 2 took longer than the average time to be matched for adoption once the court had formally decided that adoption was the best option. Whilst 2 children did fall outside of the target timescale they were not significantly delayed (one took an additional 56 days, and the other an additional 32 days) despite both children having additional needs in respect of developmental uncertainty. 3 of the 5 children in this cohort were placed within A2 timescales (78 days, 91 days and 206 days respectively), with an average of 125 days from adoption plan to decision to match.

3.13   The application of rolling averages has a significant impact on the current statistics as historical practice is impacting on current statistics. It is positive to reflect that in the last 18 months since the increased focus on delay the average time between a local authority receiving court authority to place a child and the local authority deciding to match to an adoptive family is 170 days. Regardless of historical complexities our three year average for A2 is also showing improvement.

A2 - Average time between a local authority receiving court authority to place a child and the local authority deciding to match to an adoptive family (days)
Three year rolling average
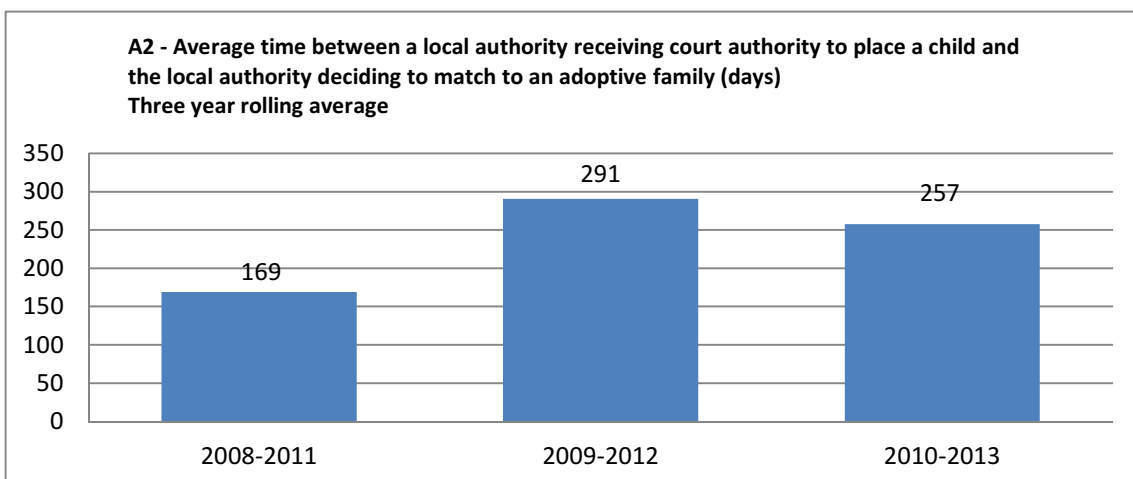
3.14 **A3 -The average time it takes for a local authority to match a child to an adoptive family once the court has formally decided that adoption is the best option.**

Year	A3 Children who wait less than 21 months between entering care and moving in with their adoptive family (number and percentage.
2010/11	2/5 = 40%
2011/12	3/9 = 33%
2012/13	11/15 = 73%

3.5 It is obviously important that children have stable placements pending the court process and in a number of cases this will be with their adoptive family. In the year 2012-13 there were a total of 14 children who had adoption as their plan, 8 of whom had been placed in their proposed adoptive placement. In the year 2012-13 there were 13 approved adoptive families, 9 of whom had children placed with them. There are currently 5 children with placement orders for whom the plan is adoption and all 5 are matched and are placed with their prospective adopters.

4. **Inspection**

4.1 The Overview and Scrutiny Panel will be aware that the agency's adoption service was inspected in January 2013. Ofsted found that overall the adoption agency provides an effective service to all affected by adoption and the overall outcome was Good. The report highlighted many areas of good practice; *the lifelong implications of adoption are fully understood and people's needs are catered for, whatever their age. Adoption is viewed as a positive option for all children needing permanency, whatever their needs of characteristics'.*

4.2 The report clearly identifies that the adoption scorecard published last year highlighted the historical poor timescale issues the service had delivered. It does however identify that yet to be published performance shows substantial improvements across all areas.

4.3   The inspection team made five recommendations for areas for improvement which are detailed within the appended action plan (Appendix A). The inspection improvement plan was signed off by the Improvement Board in June 2013.

5.   **The next 12 months**

5.1   The Government has been clear in its drive to improve services and outcomes for looked after children in all types of permanence care, with revised statutory guidance that clearly sets out the need to address the problem of delays within the adoption system. Merton shares this ambition and commitment which was endorsed in a motion to full Council.

5.2   It is apparent for all working within children's services that the current court processes are contributing to the delays encountered by children and as a result the Family Justice Review has reviewed the Public Law Outline with a programme that aims to dramatically speed up care proceedings, including a time limit of 26 weeks within which all bar exceptional cases must be completed.

5.3   Local authorities need to start permanence planning for children at the earliest opportunity. In Merton the process from the day that they enter the care of the local authority is now tracked by senior managers on a monthly basis to ensure that practice processes are followed in line with expected timescales and delays for individual children are minimised.

5.4   We also believe that wherever we have decided that adoption is the plan for a child, we should aim to place the child as early as possible with the carers who are likely to become their adoptive parents. Options open to local authorities are concurrency placements (ideally for use with infants) and fostering to adopt. Merton currently has 1 child placed in a fostering to adopt placement. We use concurrent placements whenever appropriate.

5.5   In order to ensure that adopters are progressed through the assessment process in a timely manner changes have been made to the structure of the assessment. The assessment will now be in 2 stages and will be completed in 6 months. There will be a fast track process for those who have adopted before, or who are already approved foster-carers who wish to adopt a child in their care. In Merton the Service Manager LAC, Permanence and Placements is tracking the progress of all adopter assessments to ensure that timescales are met.

5.6   Improvements in adoption support will be secured through an 'Adoption Passport', a guarantee of the minimum support that adoptive families will receive.

6.   **South West London Adoption Consortium**

6.1   Service Managers from Merton, Sutton, Kingston and Richmond have been working together to agree a plan to maximise the use of the consortium. The main focus for the first 6 months 2013-14 has been to strengthen the consortium's identity by developing a joint logo and advertising materials together with a joint recruitment initiative for potential adopters. The focus of the next 6 months will be to develop a consortium website, and to establish a virtual team to undertake the assessment work for the consortium.

7. Key Challenges

7.1 Although the Ofsted Inspection identified significant improvements in the service from its previous inspection it is important to note that there have been some highly complex cases managed by the adoption team in the past 24 months (both in terms of the children's needs and the court process). Due to complexity of these cases the timescales for these children have been outside of the adoption scorecard measures, and therefore there will be further impact on the scorecard performance. Ofsted were however of the view that Merton was successfully adopting more complex children and that this was a strength. The focus for the next 12 months will be to progress as many of the longer standing cases through to adoption orders.

7.2 Children's services have encountered difficulty in the recruitment of experienced workers and team manager for the adoption team. In June 2013 2 successful appointments were made to vacant social work posts and these experienced practitioners will start with the team in October. Unfortunately the recruitment of a team manager has not been successful, despite national advertising and a locum manager is currently in post (we will seek to re-advertise this post in September 2013).

7.3 To ensure that the improvement journey is a continuous one the Adoption Action Plan has been reviewed and updated to reflect the increased need for scrutiny and management oversight to secure timely outcomes for children who have a plan for permanence. The plan is attached as Appendix A.

8. Conclusions

The report sets out the progress and challenges for adoption in Merton and through exercising the scrutiny function, members will shape our future action plans to support our continuous improvement.

9. ALTERNATIVE OPTIONS

9.1 Elected members are required by statutory guidance to be informed of the functioning of this regulated service.

10 CONSULTATION UNDERTAKEN OR PROPOSED

10.1 N/A

11 TIMETABLE

11.1 N/A

12 FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS

12.1 The costs of the service and service improvement are contained within CSF budgets.

13 LEGAL AND STATUTORY IMPLICATIONS

13.1 Covered in the main body of the report.

14 HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS

14.1 Sound and effective CSC and wider children's services are essential in delivering children's rights under the UN convention and our work strongly contributes to improving equality and promoting community cohesion.

15   CRIME AND DISORDER IMPLICATIONS

15.1   None

16   RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS

16.1   None

17   APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT

17.1   Appendix A: Ofsted Adoption Inspection Action Plan

18   BACKGROUND PAPERS

18.1   None

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Action Plan for Permanency in Merton - Appendix a

	Activities	Lead	Timescale	Commentary	Outcome	RAG
1.	**Review of Policy, Procedure, Guidance and Governance**					
	Review local procedures to ensure that they reflect the changes to adoption legislation	Service Manager LAC, Permanence and Placements	July 2013	A review of the policies, procedures and guidance has been undertaken as part of the broader Tri-X procedures update. Team processes have also been reviewed to ensure that there is a focus on tackling delay both for children and for prospective adopters.	All practitioners are able to access up to date information on the adoption legislation and local processes. This will support consistent local practice and ensure good outcomes for children in terms of permanence	Completed
	Introduction of the new assessment framework	Service Manager LAC, Permanence and Placements	July 2013	All team members have had training in the new assessment tools. A team day has been held to review process. Panel members and practitioners to attend further training in October 2013	Timely and analytical assessments are completed.	Completed and ongoing

Action Plan for Permanency in Merton - Appendix a

A scrutiny Task and Finish group will consider the field of stability and achieving permanency for LAC as part of its 2012/13 work plan	Service Manager LAC, Permanence and Placements	August 2013	Work has been undertaken to review the management oversight of permanence and care planning for all looked after children.	Senior Management oversight of the care planning for all looked after children is improved.	Completed
Maintain the engagement of elected members on the unified Adoption, Fostering and Permanency Panel.	Head of Service CSC and YI	September 2012	Elected member on the central list appointed, support ongoing.		Completed and ongoing

Action Plan for Permanency in Merton - Appendix a

	Activities	Lead Officer	Timescale	Commentary	Outcome	RAG
2	**Ensure that the recruitment of adopters targets carers who can meet the needs of children with diverse and complex needs**					
	Review the current marketing campaign to ensure that it represents the cohort of children with a plan for permanence	Service Manager LAC, Permanence and Placements	October 2013	Work is currently being undertaken in Merton and across the South West London Adoption Consortium (SWLAC) to ensure that the marketing campaigns reflect the diverse needs of the children for who adoption is the plan. The Consortium marketing campaign will being in Merton at the end of September. SWLAC Website to be developed to support prospective adopters.		Ongoing
	Ongoing development of the post adoption support offer – the 'Adoption Passport'.	Service Manager LAC, Permanence and Placements	November 2013	The Expert Practitioner within the adoption team is developing the 'Adoption Passport' which will set out the guarantee for all of Merton's adopters. Work is also ongoing across the SWLAC and Pan London Agencies to consider the development of a cross borough/cross London guarantee.		Ongoing

04.09.13

3

Action Plan for Permanency in Merton - Appendix a

	Activities	Lead Officer	Timescale	Commentary	Outcome	RAG
3.	**Ensure processes across the services support effective permanency work**					
	Enhance the level of service provision within the Family Group Conferencing service to ensure all children who are at the edge of care and those becoming looked after are considered for a FGC.	Service Manager MASH and CP	October 2013	FGC Co-ordinator resource to be identified (Adoption Improvement Grant). A representative from the adoption team will attend all Family Group Conferences to ensure early identification of permanence options within the family.	Additional capacity in the FGC service will support the early assessment and identification of family members as permanent carers.	Ongoing
	Develop support to birth parents	Service Manager LAC, Placements and Permanence	February 2014	A Family Support Worker has been recruited to support the post adoption support work and will develop a support programme for birth parents		
	Tracking/management oversight is improved	Service Manager LAC, Placements and Permanence	August/September 2013	The Service Manager to chair meeting for all children when initiating care proceedings to ensure permanence considered Monthly tracking meetings are held to review the plans for all looked after children. A further meeting will consider the progress of all prospective adopters.	Outcomes for children are improved as risk of drift is decreased through early parallel planning.	Ongoing

Committee: Children and Young People Overview and Scrutiny Panel

Date: 17 September 2013

Wards: All

Subject: **Task Group - Scoping Report**

Lead officer: Rebecca Redman, Scrutiny Officer

Lead member: Cllr Jeff Hanna, Chair of the Children and Young People Overview and Scrutiny Panel

Contact officers: Rebecca Redman, Scrutiny Officer

Recommendations:

That Members consider and approve the proposed Terms of Reference, timescales, sources of evidence, and witnesses for the review of School Leadership Succession.

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1.   PURPOSE OF REPORT

1.1   To make proposals to Members for their forthcoming task group review of School Leadership Succession, and to seek agreement on the proposed Terms of Reference, timescales, sources of evidence and witnesses for the review.

2.   DETAILS

2.1   At the meeting of the Children and Young People Overview and Scrutiny Panel held on 4th July 2013, Members considered and agreed their Work Programme for the 2013/2014 municipal year. Members proposed that the planning of school leadership succession be the focus of a Task Group review.

2.2   The following Members were nominated to sit on the Task Group: Cllr Agatha Akyigyina (Chair), Cllr James Holmes (Chair), Cllr Iain Dysart, Cllr Linda Taylor.

2.3   On the 12th September 2013, the Task Group will hold its first meeting to decide on the scope of the Task Group review. As this meeting falls after the paper publication date for the Panel's meeting on 17th September, the scoping report will be provided as far in advance of the 17th as possible.

3.   **AIM OF REVIEW**

3.1   The aims of the task group review as decided at the Task Group meeting on the 12th September will be tabled at the meeting on the 17th September.

4.   TERMS OF REFERENCE FOR THE REVIEW:

4.1   The terms of reference of the task group review as decided at the Task Group meeting on the 12th September will be tabled at the meeting on the 17th September.

5. POTENTIAL SOURCES OF EVIDENCE AND WITNESSES FOR THE REVIEW

5.1 Members can request a range of evidence and comparative information throughout the course of the review. Members can also invite a variety of people to attend to assist in the forming of evidence-based recommendations to the Executive, and where appropriate, to partner organisations.

5.2 Members may wish to consider the following in this review: -

- Detailed officer reports supplemented by verbal evidence;
- Best practice from neighbouring Local Authorities;
- Government legislation and guidance (national, regional and local policy);
- Site visits;
- Evidence from partner organisations and stakeholders;
- Research reports/briefing papers; and
- Consultation activities

5.3 It is proposed that the Task Group consult the following stakeholders in this review:

6. OFFICER SUPPORT

6.1 Members of the School Leadership Succession Task Group will be supported by:

Rebecca Redman, Scrutiny Officer

Rebecca.redman@merton.gov.uk, 020 8545 4035

7. ALTERNATIVE OPTIONS

7.1 The Panel may choose to agree a different scope and terms of reference to those proposed in this scoping report.

8. CONSULTATION UNDERTAKEN OR PROPOSED

8.1 Members are asked to give consideration to if, and how, they would like to engage witnesses in this review.

9. TIMETABLE

9.1 It is envisaged that the Task Group will undertake and complete its review within 6 months. The final report and recommendations from the review will be presented to the Children and Young People O&S Panel for endorsement at its meeting on 29th April 2014.

9.2 The following reporting timescale should be borne in mind when conducting the review to ensure completion by April 2014: -

| 12th September 2013 | First meeting of the Task Group – Setting the Scene presentation and draft scope/evidence requirements |
| 17th September 2013 | Scoping report to Children and Young People O&S |

	Panel to formally approve
October 2013 – January 2014	Future meetings of the task group
29th April 2014	Final task group report to Children and Young People O&S Panel to endorse submission to Cabinet
June 2014	Final Task Group report to Cabinet for consideration and to relevant partner organisations, outlining any recommendations to partners, which require a response to be submitted to the Sustainable Communities O&S Panel.
September 2014	Executive Response and Action Plan submitted to O&S Panel/Commission. Task Group Champion to be appointed to monitor implementation of Action Plan and determine intended outcomes of review are achieved.

10. CO-OPTION

10.1 Members are asked to give consideration to co-opting representatives onto the Task Group for part, or the duration, of the review to assist the Task Group. In accordance with the Constitution any representative co-opted onto the Panel or Task Group will be a non-voting member of the Task Group and will be required to adhere to the Council's Code of Conduct for Members.

11. PUBLICITY

11.1 Members can publicise the review to encourage and facilitate resident and partner engagement and to promote the outcomes of the review upon completion. The following mechanisms for promotion/publication may be utilised throughout the review: -

- Press release in local press;
- My Merton;
- Community Forums;
- Merton council website;
- Ward councillors;
- Posters/materials in libraries and Merton Link;
- Staff bulletin board and plasma screens in civic centre; and
- Residents' panel and Centre for Public Scrutiny (outcomes)

12. FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS

12.1 There are none specific to this report. Any financial, resource and property implications arising from the review will be accounted for in the Task Group's Final Report.

13. LEGAL AND STATUTORY IMPLICATIONS

13.1 None for the purposes of this report. Any legal and statutory implications arising from the review will be accounted for in the Task Group's Final Report.

14. HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS

14.1 None specific to this report. Any human rights, equalities and community cohesion implications arising from the review will be accounted for in the Task Group's Final Report.

15. CRIME AND DISORDER IMPLICATIONS

15.1 None specific to this report. Any crime and disorder implications arising from the review will be accounted for in the Task Group's Final Report.

16. RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS

16.1 None for the purposes of this report. Any risk management and health and safety implications arising from the review will be accounted for in the Task Group's Final Report.

17. APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT

17.1 None

18. BACKGROUND PAPERS

18.1 None

Committee: Children and Young People Overview and Scrutiny Panel

Date: September 17th 2013

Wards: All

Subject: Update on Developments Affecting Children, Schools and Families Department

Lead officer: Yvette Stanley, Director of Children, Schools and Families Dept

Lead members: Cllr Maxi Martin, Cllr Martin Whelton

Forward Plan reference number: N/A

Contact officer: Paul Ballatt, Head of Commissioning, Strategy and Performance

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Recommendations:

A.   Members of the Panel note the contents of the report.

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1   PURPOSE OF REPORT AND EXECUTIVE SUMMARY

1.1.   The report provides members of the Panel with information on key developments affecting the Children, Schools and Families Department since the Panel's last update report in July 2013.

2   DETAILS

2.1   At its meeting in July 2013, the Panel received a report on the Home Office led peer review of Merton's arrangements to reduce gang activity and serious youth crime which had been undertaken in spring 2013. Panel members requested sight of an action plan arising from the review findings which partners had agreed to establish. This action plan is attached in **appendix one.**

2.2   Provisional A-level and GCSE results for pupils attending Merton schools were issued in August 2013 and headline data is contained in **appendix two.** As in previous years this data requires validation and detailed analysis will be presented to CYP Panel within the annual school standards report in February 2014.

2.3   Since the last Panel meeting Abbotsbury School has been inspected by Ofsted and the report published. The school retained its rating of good.

2.4   Officers are working with staff of Chapel Street, the DfE's selected academy sponsor, to progress the academisation of Benedict School, now expected to be completed by January 2014.

2.5   A partnership event designed to engage other council departments and agencies in understanding the implications of the current Children and Families Bill is to be held in September 2013. Although the Bill contains broader provisions, it signals major changes in the way in which the local authority and other agencies assess and meet the needs of children and young adults with SEN and disabilities. The existing SEN and learning difficulty assessments are to be replaced by a single, integrated education,

health and care plan for 0-25 year olds; parents and young people are likely to be given the right to request personal budgets to meet assessed needs and the local authority will be required to publish its 'local offer' clearly publicising the services and support available to young people with SEN and disabilities and their families. The legislation is designed to improve co-ordination across a wide range of children's and adults' services and local arrangements will need to be in place by September 2014.

2.6   Following a successful bid for funding from the Department of Health, officers are working with colleagues in LB Sutton and NHS Trusts in preparation for the implementation of the Family Nurse Partnership model across the two boroughs. This evidence based model is designed to provide long-term and relatively intensive specialist nursing support to young parents in the early stages of parenthood and will become an important element in Merton's early intervention strategy when it becomes operational in late 2013 after the recruitment and training of staff.

2.7   Members of the CYP Panel may be aware that central government is committed to reducing unnecessary delays in care proceedings to enable permanency plans for children looked after to be implemented in a more timely manner. To this end, the Ministry of Justice has issued a new pilot 'Public Law Outline' to inform the complex court processes involved in care proceedings and to support a proposed target that proceedings are completed within 26 weeks. Courts in London are implementing the pilot from summer 2013 and Merton's social workers and legal advisors now need to comply with tighter schedules for the submission of applications, assessments, care plans etc. It is recognised that the proposed target is extremely ambitious for many local authorities – in the period January to March 2013 Merton's average time for completion of proceedings was in the region of 56 weeks – and represents a major challenge for all parties in such proceedings.

2.8   A stocktake of progress made in the council's overall transformation programme has recently been undertaken by the Chief Executive and the Merton 2015 Board. Following this review, all departments have been asked to refresh their 'Target Operating Models' by December 2013. This refresh will support the further reform and modernisation of services to children and families as well as savings the department will be required to make within the council's overall medium term financial strategy.

2.9   Events have been held to celebrate the achievements of Merton's looked after children and the contribution made by Merton's foster carers. A photo-opportunity for Merton schools' highest achievers will be held in September 2013. Members of the Panel may also welcome the award nomination made to the London Safeguarding Children Board (hosted by London Councils) for our work on child sexual exploitation.

3   ALTERNATIVE OPTIONS

3.1.   None for the purposes of this report.

4   CONSULTATION UNDERTAKEN OR PROPOSED

4.1.   None for the purposes of this report.

5   TIMETABLE

5.1.   N/A

6   FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS

6.1.   No specific implications.

7   LEGAL AND STATUTORY IMPLICATIONS

7.1.   No specific implications.

8   HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS

8.1.   No specific implications.

9   CRIME AND DISORDER IMPLICATIONS

9.1.   No specific implications.

10   RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS

10.1.   No specific implications.

11   APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT

- Appendix 1: Action Plan from Home Office led peer review of Merton's arrangements to reduce gang activity and serious youth crime

- Appendix 2: Provisional A-level and GCSE results headline data

12   BACKGROUND PAPERS

12.1.   None

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Home Office Peer Review Ending Gangs and Youth Violence Partnership Action Plan

Youth Crime Executive Board

September 2013

Home Office Peer Review Ending Gangs and Youth Violence Partnership Draft Action Plan

Review area	Area For Improvement	Recommendations	Action planned	Lead	When	RAG
Strong local leadership	Need for a refreshed vision/narrative around gangs and serious youth violence (past – present – future).	7.1 Consider a Merton specific vision or narrative that sets out your collective approach to tackling gangs and serious youth violence – this can be internal, for partners only rather than the general public, and will help to bring even greater consistency to your approach to tackling gangs and serious youth violence.	Narrative of work to be developed and future risks to be identified with sign off at Merton Youth Crime Executive Board and Home Office	Yvette Stanley, LBM CSF (Chair)	Oct-13	
	Health partners are not yet fully engaged yet in the EGYV agenda.	Take advantage of the opportunities offered by public health and clinical commissioning group to refine their needs analysis (Joint Strategic Needs Assessment) in relation to EGYV and use this to inform the health and wellbeing strategy. This needs to include CAMHS.	Public Health to review the implications of the EGYV report and use this to inform the developing health and well being agenda. The 13/14 Joint Strategic Needs Analysis to incorporate serious youth violence issues	Julia Groom, LBM Public Health	Oct-13	

Mapping the problem	Limited evidence of what is working and why	Establish a structured and rigorous, formalised system of evaluation in order to establish which interventions and initiatives are working most effectively and why.	Commence an analysis of successful interventions to inform future service development and commissioning	Curtis Ashton, CSF Service Manager, Family and Adolescent Services (FAS)	Dec-13	
	Continue the emphasis on the collective strategic and operational approach to violence against women and girls in order to better understand the issues and responses.	Establish an overall picture and collective strategic and operational approach to violence against women and girls.	MSCB/Safer Merton to commission a review of local DV services and their impact Implement Merton Children and YP Sexual Exploitation Strategy	Paul Angeli, CSF Assistant Director (SC&YI), Annalise Elliot, Head of Safer Merton Lee Hopkins CSF Service Manager Quality Assurance & safeguarding	Nov-13	
	Continued development of mapping gang nominals across boroughs	Consider establishing new cross-border alliances in addition to the new Wandsworth/Croydon/Lambeth group. Establish links with schools across borders to share information around pupils, exclusions. This approach would be helpfully facilitated by a strong strategic steer	Extend Young People's Offender management panel (OMP) to look at cross borough issues arising in relation to young people involved in gangs or serious youth violence.	Mark Lawrence, Chief Inspector; Curtis Ashton, CSF Service Manager, Family and Adolescent Services (FAS), Keith Shipman, CSF Service Manager, Education Inclusion	Oct-13	

	Targeted and effective interventions	To develop further the 18-25 interventions with emphasis on transition and the co-ordination and management of interventions.	Work with Jobcentre Plus to develop a local partnership to target employment and training opportunities for 18-25 EGYV cohort. This should include commissioners such as probation, work programme and VCS agencies. This could link with local apprentice schemes.	Develop a targeted approach to address the needs of 18-25 year olds who are EGYV and NEET. The transitional work is to be enhanced.	Mark Johnstone, London probation	Nov-13	
		Improved targeting and awareness of the gangs and youth violence cohort through reciprocal information sharing and improved communication between all relevant agencies including the Voluntary and Community Sector (VCS)	Consider facilitating meetings for VCS working around the EGYV agenda – similar to existing sexual exploitation meetings – to ensure best use and understanding of resources.	Scoping exercise to be undertaken and meetings to be arranged by FAS gangs worker to review the agencies and services involved with young people	Curtis Ashton, CSF Service Manager, Family and Adolescent Services (FAS)	Nov-13	
	5.4 Assessment and referral	5.4.5 Continuation of MASH awareness briefings.	Consider mop up sessions to ensure full awareness of MASH to ensure that all are sighted on how Merton's children's services go from 'good to great' with the development of a first response MASH.	Continue partner visits to the MASH Continue briefings about the work of MASH MASH built into children's workforce induction	Mawuli Beckley Kartey, CSF Service Manager of Multi Agency Safeguarding Hub (MASH)	Ongoing	

	Greater clarity may be required around the links between victims of adult sexual exploitation and the work around child sexual exploitation.	Draw on existing forums and groups to improve community ownership of this agenda, ensure training around EGYV agenda is available to build the capacity of community groups and develop an EGYV specific engagement strategy that involves the community in decision making processes and structures.	Workshop/Training event/s for key agencies to take place and guidance to be issued to staff	Lee Hopkins, CSF Service Manager of Safeguarding	Nov-13	
	CAMHS need to be able to understand their role within the EGYV agenda.	Draw on existing forums and groups to improve community ownership of this agenda, ensure training around EGYV agenda is available to build the capacity of community groups and develop an EGYV specific engagement strategy that involves the community in decision making processes and structures.	Workshop to be organised by gangs worker for CAMHS staff to increase understanding of links between emotional health and gang involvement	Curtis Ashton, Service Manager of Family and Adolescent Services and CAMHS	Oct-13	

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Committee: Children and Young People Overview and Scrutiny Panel

Date: 17 September 2013

Wards: All wards

Subject: **Performance monitoring**

Lead officer: Paul Ballatt, Head of Commissioning, Strategy and Performance, Children Schools and Families (020 8545 4066)

Lead member(s): Councillor Maxi Martin; Councillor Martin Whelton.

Forward Plan reference number: n/a

Contact officer: Naheed Chaudhry, Service Manager Policy, Planning and Performance. Email: naheed.chaudhry@merton.gov.uk; Tel: 020 8545 4090

Recommendations: That the Children and Young People's Overview and Scrutiny Panel:

A. Note the current levels of performance as at July 2013 for the reporting year 2013 -14.

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1. PURPOSE OF REPORT AND EXECUTIVE SUMMARY

1.1. To provide the Children and Young People's Overview and Scrutiny Panel (CYP panel) with a regular update on the performance of the Children, Schools and Families Department and key partners.

2. DETAILS

2.1. At the Children and Young People Scrutiny Panel meeting on 5th June 2007 it was agreed that the Children Schools and Families department would submit a regular performance report on a range of key performance indicators. This performance monitoring report would act as a 'health check' for the Panel and would be over and above the more detailed performance reports scheduled to the Panel which relate to specific areas of activities such as, the Annual Schools Standards report, Safeguarding performance report etc.

2.2. Appendix one presents the performance framework for 2013 -14 comments are provided on exception for those indicators reporting as Red or Amber.

2.3. **Children's Social Care**

2.4. **Line 2 Percentage of Single Assessments completed within the statutory 45 days (Year to Date) – Red.**

2.5. 65% of Single Assessments have been completed on time since April 2013, this equates to 191 or 292. The timely completion of Single Assessments is under review alongside a review of volumes of Single Assessment currently being undertaken to ensure that thresholds are correctly followed.

2.6. **Line 5 Percentage of Children with Child Protection Plans visits due completed on time – Red.**

2.7. 77% of children subject of a Child Protection Plan were visited within timescale. Half of missed child protection visits were attributable to poor performance from a very small cohort of workers. Action has been taken in relation to this. The other missed visits were caused by a variety of factors including: a change of plan for a

family who were to have moved outside of Merton but the move did not happen and the case was closed too quickly by the team and had to be reopened; social worker being provided incorrect information of when children was returning home from education residential unit; parents and family members obstructing social workers access to children and a young person refusing to meet social worker prior to being placed in secure accommodation. All children subject to child protection plans in the Central Social Work Teams have now been visited.

Education and Early Years

2.8. **Line 33 Percentage of Statements, issued within 26 weeks with and without exceptions – Amber.**

2.9. 89% of all SEN statements were issued in 26 weeks (with and without exceptions). Statutory assessment completion with exceptions continues to be challenging due to our reliance on health for reports as part of the statutory deadline. Management action is continuing to be taken to improve the outturn our performance remains above the national average for this indicator which is 86% and the London average which is 79% (2012/13 figures).

3. ALTERNATIVE OPTIONS

3.1. The Panel's scrutiny work programme is determined by the members of the Panel.

4. CONSULTATION UNDERTAKEN OR PROPOSED

4.1. The Panel have agreed to consider the performance report on an annual basis.

5. TIMETABLE

5.1. None relating to this covering report.

6. FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS

6.1. None relating to this covering report.

7. LEGAL AND STATUTORY IMPLICATIONS

7.1. None relating to this covering report.

8. HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS

8.1. None relating to this covering report.

9. CRIME AND DISORDER IMPLICATIONS

9.1. None relating to this covering report.

10. RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS

10.1. None relating to this covering report.

11. APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT

- Appendix 1: Performance framework 2013-14 July reporting

12. BACKGROUND PAPERS

12.1. None.

CYP Overview and Scrutiny Panel - Performance Index July 2013

No.	Performance Indicators	Frequency	Merton 2012-2013	Benchmark National Average 2012-2013	Benchmark London/SN 2012-2013	2013-14 target	Polarity	% Deviation	BRAG Rating (latest Outcome Period)	Apr-13	May-13	Jun-13 / Q1	Jul-13	Aug-13	Sep-13 / Q2	Oct-13	Nov-13	Dec-13 / Q3	Jan-14	Feb-14	Mar-14 / Q4	Notes
Childrens Social Care																						
1	Number of CASA's	Monthly	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a									Monthly
2	% of Single Assessments completed within the statutory 45 days (Year to Date)	Monthly	n/a	n/a	n/a	90%	High	9%	Red	90%	74%	70%	65%									YTD
3	% of Children subject of a CP plan with an allocated Social Worker	Monthly	100%	not av	not av	100%	High	0%	Green	100%	100%	98%	100%									Monthly
4	NI 67 % of reviews completed within timescale for Children with Child Protection Plans	Monthly	97%	not av	not av	100%	High	10%	Green	100%	100%	100%	100%									YTD
5	% of Children subject of a Child Protection Plan who had a 4 weekly CP visit in timescale (child seen)	Monthly	85%	not av	not av	95%	High	0%	Red	100%	92%	83%	77%									Monthly
6	NI 65 - % of Children that became the subject of a CP Plan for the Second or subsequent time	Monthly	10.56%	not av	not av	10%	Low	10%	Blue	0%	0%	0%	1%									Cumulative YTD
7	% of Children in Care with an allocated Social Worker	Monthly	100%	not av	not av	100%	High	0%	Green	100%	100%	100%	100%									YTD
8	Children in Care rate per 10,000	Monthly	32.6	not av	not av	n/a	n/a	n/a	n/a	31.55	33.56	36.67	36.89									End of the month snapshot
9	Number of children who ceased to be LAC who were adopted	Monthly	8	not av	not av	12	High	8%	Green	0	0	1	2									Cumulative YTD
10	Number of agency special guardianship orders granted	Monthly		not av	not av					0	0	1	1									Cumulative YTD
11	NI 62 - Stability of placements of Children in Care - number of moves (3 or more moves in the year)	Monthly	Awaiting Finalisation of the DfE SSDA 903	not av	not av	15%	Low	2%	Blue	0%	0%	3%	4%									YTD
12	NI 63 - Stability of placements of Children in Care - length of placement	Monthly	Awaiting Finalisation of the DfE SSDA 903	not av	not av	75%	High	5%	Green	60%	66%	71%	71%									End of the month snapshot
13	NI 66 - Children in Care cases which were reviewed within required timescales	Monthly	Awaiting Finalisation of the DfE SSDA 903	not av	not av	100%	High	10%	Green	100%	96%	95%	97%									YTD
14	% of Children in Care participating in their reviews in month	Monthly	Awaiting Finalisation of the DfE SSDA 903	not av	not av	90%	High	10%	Green	88%	96%	83%	91%									Monthly with Quarter YTD
15	NI 61 – Timeliness of adoption placements post best interest decision	Monthly	100%	not av	not av	n/a	n/a	n/a	n/a	n/a	n/a	0%	0%									YTD 2 adoptions outside 12 months decision to be placed
16	NI 19 - Rate of proven re-offending by young people in the youth justice system	Quarterly	1.2	not av	not av	1.1	n/a	n/a	n/a			1.18											Quarterly
17	First Time Entrants (FTEs) to the Youth Justice System aged 10-17 (Cumulative)	Monthly	77	not av	not av	96	Low	0%	Blue	5	10	16	22									YTD
18	Young Offenders NEET rate	Quarterly	not av	not av	not av	n/a	n/a	n/a	n/a			3.2% 8cyp											Quarterly
20	Justice Caseload per worker	Quarterly	not av	not av	not av	n/a	n/a	n/a	n/a			12.33											Monthly
Education *For Attendance and Exclusion indicators the Merton 2012-2013 relates to academic year 2011-2012; National & London benchmarks may for previous academic years.*																						
19	Youth service participation rate	Annual	1798	not av	not av	2,000	High	0%	n/a														Annual Measure
21	Secondary School Persistent absence (LA) 15% threshold	Annual	n/a	not av	not av	n/a	n/a	n/a	n/a														Annual Measure
22	Secondary persistent absentism (15% absence)	Annual	8.2%	7.4%	6.1%	n/a	n/a	n/a	n/a														Annual Measure
23	Secondary fixed term exclusions (percentage of pupils on roll)	Annual	11.89%	8.40%	8.36%	8%	Low	2%	n/a														Annual Measure
24	% of BME Pupil Exclusions Fixed - Secondary	Annual	n/a	not av	not av	n/a	n/a	n/a	n/a														Annual Measure
25	Primary fixed term exclusions (percentage of pupils on roll)	Annual	0.64%	0.91%	0.75%	0.6%	Low	0.5%	n/a														Annual Measure
26	% of BME Pupil Exclusions Fixed - Primary	Annual	n/a	not av	not av	n/a	n/a	n/a	n/a														Annual Measure
27	Secondary permanent exclusions (Number)	Monthly	12	4370	780	12	Low	4 children per quarter	Green	7	7	8	10									August End of Acad. Yr YTD. September start of the new Acad. Yr.
28	Number/% of BME Pupil Exclusions Permanent - Secondary	Annual	n/a	not av	not av	n/a	n/a	n/a	n/a														August End of Acad. Yr YTD. September start of the new Acad. Yr.
29	Primary permanent exclusions (Number)	Monthly	0	610	60	0	Low	1 child	Green	0	0	0	0									August End of Acad. Yr YTD. September start of the new Acad. Yr.
30	Number/% of BME Pupil Exclusions Permanent - Primary	Annual	n/a	not av	not av	n/a	n/a	n/a	n/a														August End of Acad. Yr YTD. September start of the new Acad. Yr.
31	Number of managed moves - Primary	Quarterly	4	not av	not av	n/a	n/a	n/a	n/a			0											Cumulative YTD Academic Year
32	All SEN statements issued in 26 weeks (without exceptions)	Monthly	98%	93%	90%	98%	High	2%	Green	100%	88%	94%	93%									Cumulative YTD Academic Year
33	All SEN statements issued in 26 weeks (with and without exceptions)	Monthly	92%	86%	79%	95%	High	5%	Amber	100%	88%	88%	89%									Cumulative YTD Academic Year
34	Provision of Short Breaks - cumulative	Quarterly	363	not av	not av	400	High	10%	Blue			528											Cumulative YTD (Number of CYP that attended internal or commissioned shortbreak support, new coutning methodology).
35	SEN Statements Issued	Quarterly	n/a	not av	not av	n/a	n/a	n/a	n/a			34											Cumulative YTD
36	% outcome of all Children Centre Ofsted inspections good or outstanding	Quarterly	100.0%	70%	77%	100%	High	0%	n/a			100%											Cumulative YTD
37	% of total 0-5 year estimated ACORN estimated population from areas of deprivation (IDACI 30%) whose families have accessed children's centre services	Quarterly	73.9%	not av	not av	18.8%	High	n/a	Green			37.8%											Cummulative YTD
Road Accidents																						
38	CYP Road accidents - reported incidents Fatal/Serious/Slight	Annual	n/a	n/a	n/a	n/a	n/a	n/a	n/a														Annual Measure

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Committee: Children and Young People Scrutiny Panel

Date: 4 September 2013

Wards: All

Subject: **Update on CYP Scrutiny Panel task group reviews**

Lead officer: Ben Sherlock

Lead member: Cllr Jeff Hanna

Forward Plan reference number:

Contact officer: Ben Sherlock (ben.sherlock@merton.gov.uk tel. 020 8545 3864)

Recommendations:

A. That the Panel consider any further performance management they wish to undertake and establish outcomes they wish to note from the reviews.

| 1 | *Purpose of report and executive summary* |

1.1.   To provide an update on the progress made on the CYP task group review topics since their conclusions in 2011 and 2012.

| 2 | *Details* |

2.1.   Alternative Education (2010-11)

2.1.1   Education and Education Welfare teams provided an update on the action plan in April 2013.

2.1.2   This plan is included in Appendix 1 and details the original recommendations, proposed actions, timescales and progress to date.

2.2.   Post-16 Pathways (2011-12)

2.2.1   Education and Education Welfare teams provided an update on the action plan in April 2013.

2.2.2   This plan is included in Appendix 2 and details the original recommendations, proposed actions, timescales and progress to date.

| 3 | *Alternative options* |

3.1.   To leave the performance management of the task group reviews to officers.

| 4 | *Consultation undertaken or proposed* |

4.1.　　　Officers approached and asked for progress updates (see appendices).

5　　　*Timetable*

5.1.　　　To be considered at the Panel meeting on 17 September 2013

6　　　*Financial, resource and property implications*

6.1.　　　None that were not considered at the time of the reviews.

7　　　*Legal and statutory implications*

7.1.　　　None that were not considered at the time of the reviews.

8　　　*Human rights, equalities and community cohesion implications*

8.1.　　　None that were not considered at the time of the reviews.

9　　　*Crime and Disorder implications*

9.1.　　　None that were not considered at the time of the reviews.

10　　　*Risk management and health and safety implications*

10.1.　　　None that were not considered at the time of the reviews.

11　　　*Appendices – the following documents are to be published with this report and form part of the report*

- 1: Updated action plan for the Alternative Education Task Group Review from April 2013
- 2: Updated action plan for the Post-16 Pathways Task Group Review from April 2013

APPENDIX 1

Children and Young people's Scrutiny Recommendations: Alternative Education Action Plan

Recommendations	Proposed Action	Lead Responsibility	Timescale	Progress and Position to date
Recommendation one (paragraph 39) We recommend that the Secondary Behaviour and Attendance Partnerships share good practice with behaviour co-ordinators about projects to support pupils at risk of exclusion.	We recommend that the Secondary Behaviour and Attendance Partnerships continue to share good practice across schools about projects and processes to support vulnerable pupils and fulfil the new Ofsted expectation on Behaviour & Safety.	Secondary Schools Behaviour and Attendance Partnership	Partnership review Autumn 2012	Transitions Working Party TAMHS Anti Bullying Showcase Transaction Analysis Training Schools' officer – new model Restorative approaches at St Mark's Nurture groups (Raynes/St Mark's) Interdepartmental Inclusion Units
Recommendation two (paragraph 40) We recommend that there is a forum for teachers, particularly behaviour co-ordinators to meet and discuss behaviour and exclusion issues, this should place at least once a year	We recommend that annually the Secondary Behaviour and Attendance partnership looks at Borough wide Data on Attendance, Exclusions, Volume [SMART, Melrose, Alt Educ] and Outcomes. We recommend that there is a forum for teachers, particularly behaviour co-ordinators to meet and discuss behaviour and exclusion issues, this should place at least once a year.	Secondary Schools Behaviour and Attendance Partnership Virtual Behaviour Service	Annually from 2012 Summer 2012	B&A analysed data re exclusion and attendance and have requested more detailed data on outcomes tracking Volume and Outcomes built into the SMART/Melrose partnership Forum set up termly. Met in Summer: Equality/Homophobic Bullying/Data on behaviour and safety review group

Recommendations	Proposed Action	Lead Responsibility	Timescale	Progress and Position to date
Recommendation three (paragraph 41) We recommend that schools are encouraged to draw on the support of Melrose and the Smart Centre for developing projects to deal with pupils with behavioural issues. Melrose and the Smart Centre should engage with schools to agree such projects	We recommend that schools are encouraged to draw on the support of Melrose and the Smart Centre for developing projects to deal with specific pupils with behavioural issues. Melrose and the Smart Centre should engage with schools to agree such projects.	Secondary Schools Behaviour and Attendance Partnership	Partnership Review Autumn 2012	Individual consultation taken up with Melrose from a range of schools. The Melrose/SMART partnership will take forward the brief requested by schools to meet their wider needs.
Recommendation four (paragraph 46) We recommend that all Targeted Youth Support Panel meetings should have a multiagency approach involving relevant internal and external partner	We recommend that all schools should agree a process to review their Targeted Youth Support Processes / Panels including outcomes and membership [looking at involvement of multi-agency and external partners].	School Standards and Quality / Youth Inclusion	Annually from 2012	The panels will be reviewed at the Behaviour and Safety leads network. School Panels are also reviewed when the LA undertaken base audits (2 schools so far). Two secondaries have independently reviewed their panels.

Recommendations	Proposed Action	Lead Responsibility	Timescale	Progress and Position to date
Recommendation five (paragraph 47) We recommend that schools review processes to ensure early identification and planning aiming to reduce the use of fixed term exclusions.	We recommend that an annual school improvement "challenge" process should be set up where schools review their data on Behaviour and Safety [under the new OFSTED criteria], including Raise online exclusion data and agree actions school by school to meet the challenge of being outstanding re Behaviour and Safety.	School Standards and Quality / Youth Inclusion	Annually from 2012	All schools (not academies) receive at least 2 visits per year and where exclusions are high data is questioned and processes challenged. Schools who are likely to be inspected will explain all the Ofsted criteria in greater depth. New Ofsted framework has raised the bar on outstanding behaviour. School training has been done on the new Ofsted framework, including evidence of good behaviour
Recommendation six (paragraph 52) We recommend that training for teachers to deal with challenging behaviour and opportunities to consider different approaches is built into the supervision process	Training for Teachers would be identified on a school by school basis as part of the action under recommendation 5	School Standards and Quality / Youth Inclusion	Annually from 2012	CPD will be a product at schools internal monitoring and teaching (these are supported by the IA where required).

Recommendations	Proposed Action	Lead Responsibility	Timescale	Progress and Position to date
Recommendation seven (paragraph 53) We recommend that teachers can access information on reflective practices through on- line training, and material that can be downloaded from the internet	Online forums are available nationally and it would not be cost effective to develop materials on a local basis.			N/A
Recommendation eight (paragraph 54) We recommend that an on- line forum is developed so that schools can share good practice about how to improve behaviour in school.	There is not good evidence of takeup of online fora. It would not be cost effective to take forward this recommendation.			N/A

Recommendations	Proposed Action	Lead Responsibility	Timescale	Progress and Position to date
Recommendation nine (paragraph 56) We recommend that each school determine the number and length of fixed term exclusions that will trigger an in- depth assessment of that pupil's situation. Schools should share the results of this process with the council. Advice should be sought from the Education and Youth Inclusion Manager on where the trigger could be set.	We recommend that each school review its processes for the identification, tracking and support of individuals or groups with particular behavioural needs, so the school can evidence improvements in behaviour over time [OFSTED].	Schools	Spring – Summer Term 2012	SIMS behaviour module (or similar) is used to track pupils and evidence for Ofsted.
Recommendation ten (paragraph 66) We recommend that schools are encouraged to maintain links with pupils and their families in alternative education and develop a plan to re-integrate them back into the school where possible. Attention should be given to the level of pastoral care that the pupil will require on re-intervention.	We recommend that schools review how effective their processes are for maintaining links with parents and pupils where they are placed out on alternative education.	Schools	Autumn term 2012	B&A partnership has discussed this issue. A full time pastoral worker is now in place at SMART. Pastoral support is a theme of the new SMART/Melrose partnership.

Recommendations	Proposed Action	Lead Responsibility	Timescale	Progress and Position to date
Recommendation eleven (paragraph 67) We recommend that schools should also consider whether a pupil would benefit from bi-weekly/monthly meetings within the school with the alternative education provider for an agreed period of time once they have completed a period of alternative education and whether such an agreement would reduce the need for longer term exclusions.	Action in recommendation 10 will review how each school maintains links with its parents and pupils when a child is on alternative education. Schools already attend regular review meetings for timed intervention at SMART centre where pupils are placed on alternative education for a fixed period there should always be review meetings. The majority of alternative education placements are in year 11 so the young person is not returning to mainstream.			Under discussion with schools and other providers. To be considered as part of re-commissioning of alternative education.
Recommendation twelve (paragraph 68) 6We recommend that the Council should consider finding ways of making schools carry more of the financial burden if pupils are in alternative education for more that six months. This will have the effect of encouraging schools to re-integrate pupils back into school as quickly as possible	Alternative education placements made through the Youth Service are subsidised through a top slice of the direct schools grant. If schools make direct placements they pay 100% of the cost of the placement thus all the costs of alternative education are met from within the DSG or Academy funds.			Funds for alternative education are with schools and in the high needs block. The commissioning role at SMART/Melrose will look to achieve better value for money.

Recommendations	Proposed Action	Lead Responsibility	Timescale	Progress and Position to date
Recommendation thirteen (paragraph 73) We recommend that Merton Schools jointly commission alternative education provision, where this can be demonstrated to be more cost effective and focussed on the needs of pupils.	Melrose, SMART Centre and Alternative Education will meet to consider the cost effectiveness of joint commissioning some of their placements.	Melrose, SMART, Youth Service	Summer Term 2012	Joint commissioning is part of the new SMART/Melrose project.
Recommendation fourteen (paragraph 76) We recommend that the lead for alternative education in all schools should also be involved in quality assuring the alternative education process and be consulted on what form alternative education should take.	Quality Assurance of alternative education is undertaken on behalf of schools by the 14-19 strategy manager. Alterative Education leads are already invited on an individual basis to undertake specific quality assurance visits.			Q/A visits carried out regularly on alternative education provision. Visits do include school staff. All visits are joint visits including cross borough.

Recommendations	Proposed Action	Lead Responsibility	Timescale	Progress and Position to date
Recommendation fifteen (paragraph 77) The council should consider if more alternative education could be provided from within the authority if this is cost efficient.	If the Council were to provide additional alternative education places this would require either an expansion of the SMART centre or setting up of a new PRU. At present an expansion of the SMART Centre would need to be agreed by schools forum. Alternative Education provided by private providers are set up within the market where there is demand from schools. There has been a significant expansion over the last 4 years within this market.			There has been an expansion of providers who have been quality assured and are part of the 14-19 partnership. Number of places in alternative education were reviewed in establishing the new funding of SMART Centre. Medical provision has been expanded.

Recommendations	Proposed Action	Lead Responsibility	Timescale	Progress and Position to date
Recommendation sixteen (paragraph 84) We recommend that Merton Council increase the number of apprenticeships in the borough, by developing further links with local businesses and within council services and by reviewing incentives for business to take on apprentices from Merton. Merton to seek innovative ways to encourage council departments and other service providers to take on apprentices through the commissioning process and by other means.	We recommend that this action is to be taken forward at the 16+ Scrutiny Task group.	Scrutiny	Jan 2012	
Recommendation seventeen (paragraph 85) We recommend that thought should be given to creating a post to support the creation of links to business and creation of apprenticeships	We recommend that this action is to be taken forward at the 16+ Scrutiny Task group.	Scrutiny	Jan 2012	

APPENDIX 2
ACTION PLAN FROM SCRUTINY REVIEW ON POST 16 CAREER PATHWAYS

Actions	By when	Lead dept/ officer	Next Steps/Outcomes	Progress
Recommendation 1				
Council to support the further development of existing links between businesses, schools and universities to support post 16 career pathways.				
• Consult with schools to identify current partnerships and opportunities for development • Consult with schools to identify possible new local business partners • Consult with schools to identify possible future HE and FE partnerships • Agree joint/individual approaches and follow up actions • Consult with future Merton Business Growth Officer to identify possible local business partners • Merton to host raising awareness event during National Apprenticeship week	Jan 2013 Nov 2012 Feb 2013	CSF JM/ PMcG SW 14-19 Apprenticeship Group	All schools have employer engagement activities as part of PSHE programme All yr 10 or 12 pupils to have a minimum of 5 days WRL	National Apprenticeship week activities in schools and further bespoke opportunities being organized by EWG Schools are offering WRL in year 10 and 11 Some schools hosting employer engagement events, e.g. Careers Academy at RPHS Project Search commenced at Cricket Green School Economic Well-Being Group established. RPA action plan has been tabled at DMT All secondary schools have a range of HE aspiration days Merton College Oxford HE aspiration day held in Oct 2013. Opened by Leader of the Council

Recommendation 2				
Council to engage relevant departments and seek to increase the number of apprenticeships and opportunities available to young people through the Tendering process; Community Plan; Regeneration Plans for Merton; Family Poverty Strategy and Action Plan; and Existing links with schools				
Tendering Process:		CSF	Other Council departments engaged through strategic plans and procedures	Apprenticeship week activities held at LA, Merton Priory Homes
• Consider options within CSF procurement processes and schedules	Oct 2012	JM/YS		
• Consider options with corporate team	Nov 2012	CSF		
• Ensure that LA officers liaise with 14-19 Apprenticeship Group when planning and delivering new Apprenticeship offer	Jan 2013	JM/TP	Increase current 2013 Merton LA Apprenticeship target from 30 to 60 in 2014	Merton and Sutton joint Apprenticeship Forum established
Community Plan:		PB/TP	Increase Merton resident apprenticeship starts from 956 in	
• Liaise with CMT lead and consider options for inclusion in CP	Oct 2012	JM/YS	2011-12 to 1100 in 2013-14	
• Develop and incorporate feasible options	Nov 2012			
Regeneration Plans:		JM		
• Meet with Environment and Regeneration AD to discuss	Jan/Feb 2013			
• Follow up actions as		YS/AJ		

appropriate	Nov 2012			
• Merton Priory Homes to commence Apprenticeship programme for 50 Merton residents	Nov/Dec 2012	KES/ PMcG		MPH program commenced
Family Poverty Strategy/Action Plan: Troubled Families team to develop new Apprenticeship offer				
Links with Schools:				
• Develop current apprenticeship CEIAG and offer in schools				
• Explore further opportunities and funding options to develop offer				Merton Apprenticeship Ambassador facilitated CEIAG events at schools during Apprenticeship week and arranging follow up bespoke activities.
• Continuation of Adult Education pre-Apprenticeship programme				LA officer identified to provide CEIAG Apprenticeship support to schools

Recommendation 3				
Council to act as a point of contact for voluntary and community sector groups seeking to engage with the apprenticeship and citizenship opportunities, where possible using appointed champions in the council				
• Liaise with Apprenticeship lead officer in HR and receive updated information on current position. • Liaise with 14-19 Apprenticeship group • Liaise with National Apprenticeship Service(NAS) • Review existing plans to develop apprenticeships and identify possible further options • Work with officers to support relevant groups considering apprenticeships.	Oct/Nov 2012	CSF JM		Continuation of VCM sixth form volunteer program in sixth forms for 60 pupils. NAS represented on Apprenticeship Forum TRP identified as Merton Apprenticeship Ambassador LA Apprenticeship event for Managers in March 2013

Recommendation 4

Council to audit and bring together the range of initiatives currently delivered across the borough to ensure a cohesive service is offered online and ensures improved access to information for young people, parents, carers and schools.

• Review on line current offer and links to other services.	Dec 2012	CS/CSF PMCG JH	All young people have access to online CEIAG resources.	Achieved. All schools have access to resources via LGFL
• Review current improvement plans				*Some* secondary schools share use of careers advisor
• Schools to share plans for on-going CEIAG delivery	Oct 2012		Schools to work in partnership to deliver CEIAG offer	16-19 Merton prospectus updated Sept 2012. All providers have course details on UCAS progress
• All schools receive training on UCAS Progress(16-19 Prospectus)	Sept 2102		All pupils are aware of 16-19 offer at schools, South Thames College Merton, and training providers	All secondary schools have a participation support officer to work with pupils at risk of NEET
• Update the Merton 16-19 prospectus				LA RPA workshop held Jan 2013

Recommendation 5				
Schools to be encouraged by the Council to build upon the existing positive collaboration between institutions to further improve the vocational offer at sixth form.				
Merton schools 6th Form forum to lead on this – to consult with heads first

In preparation for RPA, schools and colleges to develop vocational offer at entry and level1-2 | Nov 12 ongoing | SOH/

PMcG | All pupils have access to entry to level 3 16-19 local offer | Schools have reviewed their 16-19 offer for 2013 in light of RPA

Continuation of vocational offer at South Thames College

Melrose and SMART centre consultation document |

Recommendation 6

A dedicated officer to be identified to develop relationships with local businesses to increase the support and opportunities available to young people.

• Through discussions with corporate colleagues and DMTs identify the resource within departments	Jan 2013	JM	One LA officer acts as key liaison with local employers.	Designated LA officer in Future Merton appointed to broker links between employers and schools and young people
• Co-ordinate working group around these resources				
• Seek to develop further through service reviews/ restructures trying to identify part of officers roles which support this work	Nov 2012			
• Liaise with FutureMerton to engage with businesses and preparing and employment and skills strategy				

Recommendation 7

Council to look to develop a mutually beneficial partnership approach with local businesses to encourage them to offer apprenticeships, sponsor school events, advise on career paths, undertake a mentoring role and to sit on school governing bodies.

• See above • Governor support service to promote opportunities through website and contacts • Headteachers supported where possible in seeking community Governors for their schools and sponsorship from local businesses • Headteachers consider further options for mentoring • FutureMerton and the Economic Wellbeing Sub-group of the SCTP Partnership to develop opportunities with local businesses	Oct 2012 Nov 2012	JC JM		Economic Well Being Group established, with elected member representation Merton Chamber of Commerce launching Take One" campaign in April 2013. TRP(Merton Apprenticeship Ambassador) represented on Schools Forum Schools hosted employer events, e.g. Speed Careers/Careers Academy UK Career Academy at South Thames College
Further Aims				
Raise awareness with CSF Lead Members in order to facilitate discussions with Cabinet Colleagues				