

GREAT MISSENDEN C of E COMBINED SCHOOL

CONVERSION TO ACADEMY

PROJECT SCOPE/DESIGN PROPOSAL



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1. BACKGROUND

Great Missenden Church of England Combined School (the “School”) is a large school in an advantaged socio-economic area with a reputation for ensuring the successful integration and development of all children, especially those with learning difficulties. 380 children between the ages of 3 to 11 are on the roll, the majority being white British

At its last OFSTED inspection in November 2006 the School was rated as outstanding.

A more recent SIAS inspection in February 2013 also rated the School as outstanding in all areas assessed.

As noted by both OFSTED and SIAS the School has an experienced Head and Senior Management team supported by a committed board of governors.

“The staff and governors are always seeking ways to improve the school”. (OFSTED 2006)

“The Head and deputy have an inspirational vision to ensure that every child has the best opportunity to learn in a Christian environment which is shared by staff and governors” (SIAS 2013)

Until this juncture the pursuit of “Academy status” has not been high on the School’s agenda. It has been a standing item at Governor meeting’s in terms of monitoring the success of this government initiative, but until this point the advantages to be gained were not obvious. The Staff and Governors were able to provide an outstanding level of education for children under the current structure, and it was felt that there was no necessity for change.

However, more recently two significant challenges have emerged which “Academy Status” has the potential to mitigate.

1) Budgets have been progressively cut

Over the last two or three years the budget allocated from County has progressively diminished with the carried forward surplus being gradually utilised to cover the operating shortfall. As of June 2013, the Bursar is predicting that for the year ended March 2014, the carried forward surplus will be zero and that the £14k carried forward from April 2013 will be fully utilised.

Moving forward from this point, if all remained equal, the School would therefore experience a shortfall in 2014 /2015. The Bursar has expressed concerns, based on her current understanding of future budgets, that there could be less money in future years, which can only have a negative impact on Great Missenden pupils.

Academy status would mean:

- Funds provided to the LA for services to schools would come directly to the school
- the School having greater control over the service providers that it uses and therefore more ability to select based on cost and/or quality.

2) Admissions numbers are not within the School’s control.

The School cannot operate on a three class in-take basis at Key Stage 2 every year because of the lack of classroom facilities. County will not commit to

expenditure for additional classroom facilities, and have indicated that they might prefer the School to operate on a two class intake basis every year despite the high demand for places from parents.

Any reduction in in-take numbers is likely to have a negative impact on pupils as some economies of scale would be lost and proportionately more money per pupil would need to be spent on overheads rather than improving outcomes.

Academy status would allow the School to set its own admissions policy and tell County how many places are available. It might also (to be confirmed) mean preferential access to capital grants direct from government which would allow the school to build an additional permanent classroom facility.

Given these considerations the Governing Body has agreed that the School should register an interest in becoming an Academy, and has established a Steering Group to investigate in more detail the pros and cons of Academy status.

The Academy Project Steering Group is tasked with the initial objective of making a formal recommendation to the Full Governing body as to whether Academy status should be pursued, or not. If Academy status is recommended, the Steering Group (with composition and structure modified as necessary) would then be responsible for the transition process and putting in place the required management structures / administrative procedures associated with the new legal status.

All members of the Governing Body are agreed that the overriding project objective is to identify the operating structure for the School which provides the best outcomes for the children.

2. SCOPE

2.1 Project Approach

The approach to the project is set out below. Phase Three is outside of the scope/remit of the current project team.

Phase One – Investigation

In order to make a formal recommendation to the Governing Body based on clear and objective analysis, three major questions need to be answered.

- 1) Will the school be better off financially as an Academy?
- 2) Will taking control of the admissions numbers deliver the class size / class numbers which the school's Governors and Senior Management team feel is optimum?
- 3) How does the School's current Voluntary Controlled status compare with Academy status from the perspective of Administration, Human Resources, Legal, School Management and Governance? In light of this, are there any reasons why Academy status should not be pursued? Would Academy status provide a more flexible structure giving advantages such as fund raising capability?

It may be difficult to answer these questions definitively in which case it will be important to clearly understand the information gaps and take decisions based on judgements around the "balance of probability".

It is also acknowledged that some pertinent information might only become available once the conversion process is actually underway. It is therefore envisaged that Phase One of the project will, to some extent, run concurrently with Phase Two - Conversion (see below).

The government provides funding of up to £25k to assist schools with the conversion process and this is paid whether Academy status is ultimately achieved or not. The School is applying for this funding and will utilise it to engage third party support to inform Phase One and, as applicable, advance Phase Two.

Phase Two - Conversion

The majority of the preparatory work will already have been completed under Phase One, so if conversion to Academy status is approved, Phase Two would be to actually deliver Academy status on time and on budget. Main tasks at this stage are understood to include:

- informing key stakeholders of decision and rationale behind it;
- putting in place an appropriate legal structure and defining any new roles and responsibilities;
- making all necessary changes to staff T&C's (TUPE);
- ensuring all services provided by County are either still in place or transferred to new providers as appropriate; and
- organising a celebratory event!

Phase Three - Realisation

Realise the Financial and Admission procedure benefits identified (not within scope) but included in this project outline document for completeness

2.2 Deliverables

It is envisaged that answers to each of the three major questions forming Phase One of the project will be documented in such a way as to clearly summarise the factual position, provide an evaluation of the key considerations and set out the resulting conclusions / recommendations.

Assumptions, if any, should be documented, recommendations should be based on evidence rather than intuition, and sources of information referenced.

The Project Manager will be jointly responsible, with identified Governor(s) on the Steering Group, for preparing the documentation for each major question. This will then be considered and ratified by the Steering group as whole before presentation to the Whole Governing Body.

Recommendations should be considered and made from the view point of all Stakeholder groups as a far as practicable and input sought from the identified "Stakeholder Representative" member of the Steering Group.

The exact content of the documentation forming the output from **Phase One** cannot be determined at this stage but is likely to cover:

Financial

- The likely impact on money received
- The likely impact on money to be spent
- Opportunities to raise additional funds and make savings on expenditure
- Additional funds available to improve outcomes for children
- The cost of conversion

Admissions

- The likely implications of non-conversion
- The likely implications of conversion
- The likelihood of securing additional funds for classroom expansion

Legal/Administrative

- Major implications of conversion on stakeholders
- Identification of issues/challenges
- Plan for stakeholder communication
- Stand alone or consortium based
- Identification of Third Party partners
- Conversion plan capable of delivering on time and on budget
- Roles and responsibilities after conversion

A comprehensive list of questions worthy of consideration, which were the result of discussions with schools that have already converted, has been circulated by Belynda Cook. These provide an excellent starting point for the working groups.

The **Phase Two** deliverable is conversion itself, but will include legal documentation, new governance structures etc.

3. STAKEHOLDERS

The table below details the key project stakeholders identified.

Stakeholder	Potential Impact
Children	Educational Outcomes
Teaching Staff	T&Cs/Resources/Career Development
Governing Body	Governance/Time/Responsibilities
Parents	Educational Outcomes/Uncertainties
Church	Legal/Christian Ethos/Land
Local Community	Concern about the unknown

All of these groups have a vested interest in this project and their input should be invited and any concerns managed at the appropriate juncture. A project team member has been assigned responsibility for “representing” each of the main stakeholder groups to look at the schools plan from each group’s perspectives, elicit input, and manage communication flows.

4. PROJECT PLAN

4.1 Project Team

The individual members of the Steering Group have been allocated specific roles on the project team as follows:

Name	Job Title	Project Role
Roz Thomson	Head	Sponsor
Lynda Read	Bursar	Project Manager
Caroline Taylor	Deputy head	Human Resources
Iain Colling	Parent governor	Finance
David Battman	Parent Governor	Finance
Wyn Griffiths	Foundation Governor	Admissions/Curriculum Stakeholder Mgmt. / Insight (Church)
Belynda Cook	Chair of Governors	Admin/Legal
Catherine May	Parent Governor	Admin/Legal
David Boyd	LEA Governor	Admin/Legal
Kate Wilson	Teacher rep	Stakeholder Mgmt. / Insight (Staff)
Bruce Kirk	Teacher Rep	Stakeholder Mgmt. / Insight (Children)
Julie Gannon	PTA Chair	Stakeholder Mgmt. / Insight (Parents & Community)
Greg Nicholls	Parent Governor	Branding/Celebration

Each team member has been allocated a main area of responsibility to support the internal Project Manager (Lynda Read) in delivering the project outputs.

Outside resources such as legal representatives will be required in addition to the resources identified above.

An external project management resource might also be necessary, the requirement for which will be kept under review by the Steering group.

4.2 Timescales

An outline timetable assuming access to and availability of key personnel is detailed in the table below. At this stage target dates have been driven by the project requirement to have achieved Academy status, if pursued, by January 2014.

	Milestone	Target
Project Design Approval	Project plan and responsibilities agreed	14/07/2013
Investigation Feedback	Finance and Admissions Investigation etc. Findings	20/09/2013
Solution Design	Preferred structure, partners identified & priced	01/11/2013
Governing Body sign off	Decision on future structure	13/11/2013
Academy Launch	Live	Jan 2014

5. RISKS & DEPENDENCIES

Stable Senior Management team throughout the process

Availability of governor resource before and after conversion

Approval of Diocese

Agreement of stakeholders

Availability of Government conversion funding

6. NEXT STEPS

Approval to proceed on the basis outlined, including agreement on roles and responsibilities, is sought from the Steering Group as a matter of urgency.