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SOME OF THE ISSUES ARISING FROM THE AMALGAMATION
OF SCHOOLS - AN ADMINISTRATIVE AND MANAGERIAL STUDY

Gwynnedd Jyl Haynes

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1987



ABSTRACT

Some of the issues arising from the Amalgamation
of Schools - an Administrative and Managerial Study

Gwynnedd Jyl Haynes

The thesis is based on a case study of the amalgamation of two comprehensive schools in County Cleveland in response to Government demand to reduce surplus places in secondary schools. It looks at the effects of this process on school ethos, curriculum and personnel.

Chapter 1 outlines the changing educational and political background to the study from the late 1970s to the present day. In Chapter 2 the various responses of four other North Eastern local authorities to the challenge of falling rolls are outlined along with that of Cleveland. Chapter 3 examines the process of amalgamation and describes the two schools before the event. Chapter 4 gives a complete curriculum analysis of these two schools and of the resulting amalgamated school in order to assess the effect on curriculum. In Chapter 5 the effect on personnel is investigated in some detail. The stress levels of staff are analysed and the reasons for this stress are examined. Methods of minimising this problem are suggested in managerial terms. Stress of pupils is assessed by looking at attendance rates, truancy and in-school vandalism. Chapter 6 presents an outline of the changes needed to cope with the new situation and looks at methods of preparation for change which could have been helpful. Chapter 7 outlines two major experiments within County Cleveland which could be viable alternatives to amalgamation, i.e. consortium and cluster arrangements. The final chapter attempts to sum up the whole process and outcome of the amalgamation and considers what better preparation might be made should further contraction occur.

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FOREWORD

The purpose of this study is to examine some of the issues within an amalgamated school's situation: it is a case study of the school in which I work.

Before the subject can be meaningfully explored the scene must be set against which it may be viewed, i.e. a brief look at the changing emphasis in education and at the political climate obtaining from the late 1970s to the present day.

CHAPTER 1

THE BACKGROUND



Twenty years ago considerable amounts of time, money and energy were spent on the discussion, development and implementation of a new-style curriculum: in the 1960s the DES's spending on In-Service Courses for teachers rose from £18k to £100k.¹ A viable curriculum model was being sought with research occurring in America and England: the result at that time was that millions were spent on the Nuffield Foundation project and similar projects where the emphasis shifted from teachers as instructors to teachers as managers in a learning situation. In a similar way the next twenty years will probably bring changes of emphasis not only in the teacher's role but also in curriculum content and with this a continual analysis of curricular needs and evaluation. In the current social/economic climate the curriculum needed is very different from that of the booming sixties. There are many factors which will affect change in the present-day curriculum, all are inter-related and cannot be scrutinised singly. The most important of these factors was the dramatic fall in school rolls, high unemployment, the changing face of industry, the introduction of the GCSE examination and the trend towards accountability. In January 1979 Lord Carr was quoted by the TUC and CBI²:

"We do not see the function of schools as being to persuade young people to enter industry and commerce, but we do regard the preparation of young people for working life along with the improvement of general understanding of the means by which the nation's way of life and standard of living is sustained as being amongst the most important issues as regards education in schools. Bearing in mind that young people will grow up in a country in which they have an increasing share in the decisions which will affect their working lives, we do see a case for teaching many subjects with some general regard to their vocational relevance."

In saying this he was voicing the growing awareness for the curriculum in schools to be more meaningful for the majority of pupils and with the introduction of TVEI project by MSC the method of approach, evaluation and experience has leapt forward and is making inroads across the curriculum. The important feature of this is that it is helping schools to move away from being examination oriented towards the development of the well-integrated pupil; a goal towards which all teachers strive but often have to neglect because of examination demands.

In the mid-sixties there was a 'bulge' of school-aged children; school rolls were high, classes full and new schools were built to accommodate the increased numbers. In 1974 Government legislation introduced ROSLA, i.e. the Raising of School Leaving Age from 15 to 16, which meant that children were kept in full-time education for a further year - no longer on a voluntary basis. This increased the school population even further - some 40% of children due to leave school, and who would normally have chosen to do so, had to stay. There was a need for curriculum expansion so that the extra year was not simply to dilute that already offered.

In this climate subjects blossomed, option choice increased, pastoral systems sprang up, high-flying groups could be creamed off for selective teaching while small, slow-learning groups were also viable: all educationally desirable and possible in this period of rapid expansion. Many of these features remain today, albeit in reduced form in some cases, but with falling rolls and the obvious contraction needed, the reverse must happen or a viable alternative be offered. As school rolls fall then staffing numbers must also fall

and this affects the diet on offer; minority subjects decline as specialist staff leave and are not replaced, option choice narrows and hence group-size increases despite union objection. Pastoral systems are dated - "pastoral staff" now often being "academic staff" as well, which as a side effect reduces the more social extra-curricular activities as staff are diversified and find less time to fulfil any one role. As these effects become more widespread then it will become increasingly difficult to offer a balanced curriculum in smaller schools. Amalgamation is the logical step if the wide range of subjects on offer is to be maintained, or a large number of peripatetic staff touring many schools will be required to supply the minority needs: there must be some form of pooling human resources or something to replace the teacher.

As the effects of falling rolls become more apparent then the curriculum offered must be continually monitored to ensure that what is offered is what is needed: there is no justification for J.A. Peddiwell's "Saber-tooth Tiger" syndrome.³ Until the mid-1980s one of the strongest incentives for children to work in school was the carrot of examination success not as an end in itself but as the opening into the world of work; good examination results tended to lead to reasonable employment. With the projected figures for unemployment in the 1990s being about 5 million⁴ then this incentive is unrealistic - new methods of motivating children to work must be sought since only very few are self-motivating. Learning must become self-fulfilling and enjoyable as teachers become more and more managers of learning situations rather than disseminators of facts - since class-size along with wider ability ranges probably preclude this

anyway. Therefore children must be taught to seek answers for themselves - they must learn how to learn. The Nuffield projects began using this method but became narrowed by too much guidance with examinations in mind. Children need to learn how to find facts rather than the facts themselves - a radically different concept for them, and in teaching them to do this they should experience many diverse sources under the teacher's guidance. At the same time the status of those subjects such as the crafts, art and music must be raised so that they are not seen as time-fillers. It is important that the creative arts are encouraged in all schools as the unemployed will have more time for leisure activities than ever before. Individual sports should be encouraged also since team sports may not be possible after school finishes; we should train the pupils for leisure rather than exclusively for work. Those recreations like "pop-mobility" usually on offer as extra-curricular activities should be incorporated within games lessons so that pupils can continue with them when they have left school. It is also important that pupils should be made more socially aware both of the community and the environment in which they live, so that the long-term stress brought about by unemployment is not manifest in anti-social behaviour. Social education programmes should increase across the ability range so that all are aware of current problems and polarisation of socio/economic groups does not occur or class differentiation may increase. Basically this would mean an acceptance of a new concept of the work-ethic since this is so engrained it is probably one of the biggest adjustments children will have to make; it is a problem which the curriculum should help to eliminate by changing emphasis from examination success to the

production of well-adjusted young adults. All this follows the criteria put forward by the Further Education Unit in "A Basis for Choice" which recommended courses should have a 60% common core and 20% each of vocational oriented courses and job specific experience. Pring, Professor of Education at Exeter, summarises these ideas in "Preparation for Life - A Challenge for Education"⁵:

"... there is a development of a more practically based curriculum for many youngsters that will (in theory at least) relate more closely to their personal needs and to those of the wider society."

As the curriculum shifts emphasis from fact-learning to fact-finding a new challenge must be met, i.e. the use of micro-processors in most information based fields of work. To use many of the teaching aids available, e.g. CAL, Prestel and computers themselves a basic knowledge of computing is both helpful and desirable. TV, video and video-games have opened many pathways to the below average and have given them a base from which to progress. The ability to handle micros will become increasingly important as more industries become computerised. The micro cannot be denied, the changing face of industry has to be accepted: traditional industries are dying as the Third World takes over the labour-intensive field. With LEAs' grants micros are now in most schools and some skill in their handling is essential across the ability range.

It would be an easier task to cope with new technology, a changing world of work and contraction in schools if the external pressures from LEAs, the DES and inevitably the examination boards was reduced. Instead these pressures seem to increase with ever-increasing demands for accountability for new methods of teaching and a revision of curriculum

content. The present Minister for Education, Mr. Baker, has also hinted at a mandatory national curriculum.⁶ With the advent of GCSE new syllabi new teaching methods are dictated simply by the course requirements; this is time consuming and in an era of contraction time is an important issue.

By the late 1970s the growing concern of the DES with respect to the falling number of live births and hence the decline in school population was made public. At the North of England Education Conference in January 1977 the Secretary of State said:

"The first consequences of that decline (in population) are visible in the half-empty classrooms in the infant schools of some of our new towns and big local authority estates as well as in inner city areas."

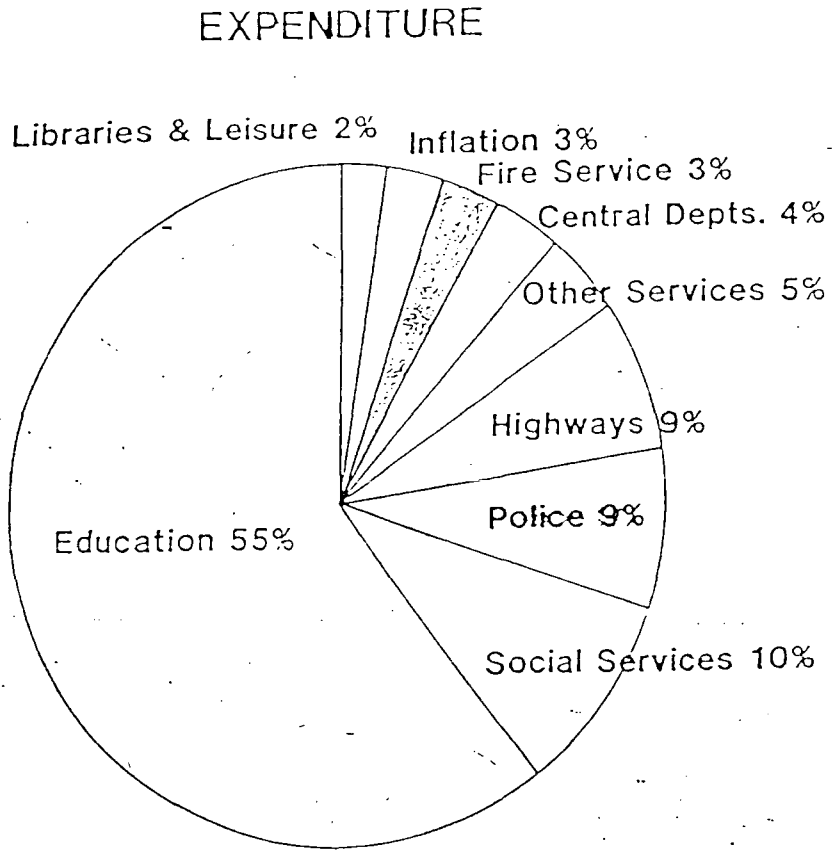
DES Circular 5/77⁷: Falling Numbers/School Closures was to highlight the problems facing educational establishments and in particular the primary sector since it would be the first area in which the problem would be manifest. In response to this document there were widespread changes within Cleveland County which resulted in a number of school closures and amalgamations at primary level. Cleveland took this opportunity to bring Primary Education into one seven year block. It had previously been in two parts - Infant: 3 years; Junior: 4 years. On each base, where an Infant and a Junior School could be placed under the leadership of one Headteacher, and the number on total roll was less than or equal to a two form entry, this arrangement was considered as viable. Each case was looked at individually and the ease with which each site could be rationalised in this manner was studied. In every case a simple procedure was followed whereby all relevant bodies met and apparently agreed on the proposed mergers. Public notices were

issued but no public meetings were deemed necessary since no objections were raised against any proposal. The whole programme has taken 10 years to date but is now seen by the Assistant Education Officer i/c Primary Education as having been completed satisfactorily.

At secondary level there was very little concern apparent but by the publication of the DES Report 96⁸ in November 1979 it became obvious that dramatic changes had to occur at secondary level to embrace the contents of that report. The figures which were as accurate as possible showed that by the early 1980s falling rolls meant that schools were no longer being used efficiently. Rolls were forecast to fall from around 9 million in 1979 to 8 million by 1983 with a further decrease to about 7.5 million by the end of the 1980s.⁹ This meant that the physical capacity of the buildings was under-used and of even more economic importance the schools were becoming over-staffed.

At this time there was increasing Government pressure being applied to Local Governments in terms of the penalties being imposed when they failed to meet their budgets. For this to happen expenditure had to decrease and since in Cleveland County some 55% of the total figure went to the Education Sector it became an obvious target for cuts (see Figure 1). Coupled with this pressure from Government there came another DES Circular, i.e. 2/81¹⁰ which made it clear that the number of surplus places in schools was not being decreased as quickly as the Government wanted. This document was to bring to Cleveland widespread changes in the secondary sector in the form of amalgamation of schools across the county.

Figure 1



Extract from "County Council's Financial Position" Nov. 1985

The Education Committee and Authority formulated plans of amalgamation to meet the demand of the Government to rationalise the falling roll effect and hence take out surplus places and under-used buildings (see Appendix 1). The amalgamation which I have used is only one of many proposed and effected within the authority: there are still amalgamations being lobbied against and some still to be put into operation in this enormous task of reorganising the secondary schools within the County to comply with the Government's requirements. Within the area there have been numerous reorganisations as the County boundaries changed and earlier the LEA itself changed with the birth of Teesside and later Cleveland from a mixed background of County Durham and North Yorkshire. Within the framework of changing educational needs and the need for rationalisation of schools' surplus places, the amalgamation process which was to affect the schools featured in this study began.

Change is not unusual to teachers as a profession since one must be constantly evaluating and adapting to meet the different needs of pupils; so the amalgamation process should not have been a wholly new experience. There are many teachers who are reluctant to change but in this case the words of Bacon¹¹ are extremely pertinent:

"He that will not apply new remedies must expect new evils; for time is the greatest innovator."

Man cannot stand still since the passage of time must bring change whether or not it is desirable.

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- 4 Guardian Newspaper, December 1986.
- 5 Pring, R.: 1984 "Preparation for Life", Money Management Review No. 10. Peter Rutland Publications.
- 6 Times Education Supplement, December 12 1986, "Baker Proposal Bemuses DES", p.3.
- 7 DES: June 1977: Circular No. 5/77 "Falling Numbers/School Closures".
- 8 DES: November 1979: Report No. 96 "Trends in School Population".
- 9 *ibid.*
- 10 DES: June 1981: Circular No. 2/81 "Falling Rolls and Surplus Places".
- 11 Bacon: 1625 "The Essays of Bacon", from "Helping Schools Change". H. Heller, CSCS, January 1985, p.1.1.

CHAPTER 2

LOCAL LEAs' RESPONSES TO THE DES CIRCULAR 2/81

Cleveland

Durham

Gateshead

N. Yorkshire

Sunderland

This study is primarily concerned with the process of amalgamation within the county of Cleveland. For comparison the surrounding LEAs, namely N. Yorkshire, Gateshead, Durham and Sunderland, are briefly studied. Geographically these are the closest LEAs to Cleveland. Educational changes occurring within the county and where applicable amalgamation procedures, redeployment of staff and the terms of early retirement schemes are outlined. These topics have been discussed at length with the most senior administrative officer in charge of secondary establishments and Appendix 5 includes all the relevant documentation. A nationwide comparison was unnecessary for this study since the matters are governed by legislation, practices in all LEAs have much in common and hence the differences between those studied and others could only be marginal.

Although the DES 2/81 paper would suggest that rolls are falling everywhere, this is not the case and even within these LEAs studied there are areas of growth where pupil roll is increasing steadily and where from births already recorded this increase will continue. These areas are exceptional within all the LEAs studied but are worthy of note since some flexibility in terms of redeployment is possible. The LEAs have been studied separately and comparisons drawn to highlight major differences.

In January 1982, shortly after the DES report 2/81, Keith Joseph, then the Education Secretary, told the North of England Conference in Leeds that compulsory redundancy among teachers should be used.¹ He said that this "would not only save money but also rid the education service of "ineffective" teachers". He went on to say that natural

wastage and early retirement would not be enough. This message, however, was unheeded since each of the LEAs, where I discussed the problems of shedding staff, has a no-redundancy policy. In August 1986 Cleveland's "Evening Gazette"² reported the current Education Secretary, Kenneth Baker's view. By 1991 he wanted to see 350,000 places removed from primary education and 800,000 from the secondary level. The aim was to save £750 million over a five year period. To do this he called for "a dramatic increase in the rate of school closures and amalgamations".³ In Report No. 117⁴ from the Audit Commission, it is suggested that the equivalent of 1,000 secondary schools would have to be closed to eliminate the surplus places. The Government's proposal of 600 school closures means approximately six in each authority, but this would still not eliminate all the surplus places. It would be the LEAs' decision which schools were to be named for closure. In Cleveland this was reported in the local press in August 1986 while amalgamation proposals were still being studied by the DES. This statement from Mr. Baker was seen as "sealing the fate" of some of the proposed closures.

It is interesting to look at the different responses from the nearby LEAs to the same problem of surplus places. From the five which have been studied only two have had the same response while the others have a variety of solutions to the problem. The reasons for the differing responses may be due to any number of factors from geographical problems to political pressures. For this study it is sufficient to note the differences.

Cleveland LEA has stated that amalgamations within the county are designed to cut costs while maintaining education standards. The LEA has been generous over the past years in the pupil/teacher ratio, as shown in the following analyses. With this in mind as well as the fact that 68% of the total cost of running a school is on staff salaries then the obvious way of cutting costs is by reducing staff numbers. Smaller schools have to be staffed generously to maintain the curriculum balance so the next logical step is not to have small schools. This is the purpose of the amalgamation programme, however when it is not possible to amalgamate smaller schools due to awkward geographic locations then those schools must remain despite the expense. (In fact the county has other plans which are discussed in the following chapter). The history of reorganisation within the county has already been explained in earlier chapters so here only the redeployment procedures and early retirement schemes will be discussed.

Over the past five years, i.e. since the initial DES Circular 2/81, the shedding of staff and pupil places have become crucial issues of County policy. To lose staff in large numbers solely by natural wastage is unrealistic so incentives have to be offered. The incentives available are very limited and some are short-term. Courses and retraining programmes can solve individual schools' problems for a period of time but those teachers involved are still being paid and so while the body count in a given school may be correct, the salaries bill does not diminish. Staff may be "loaned out" to other schools which have a subject teacher shortfall, but at the end of the period of loan the problem returns. It is always the hope of the LEA that

while short-term solutions are being used, a long-term one may appear!

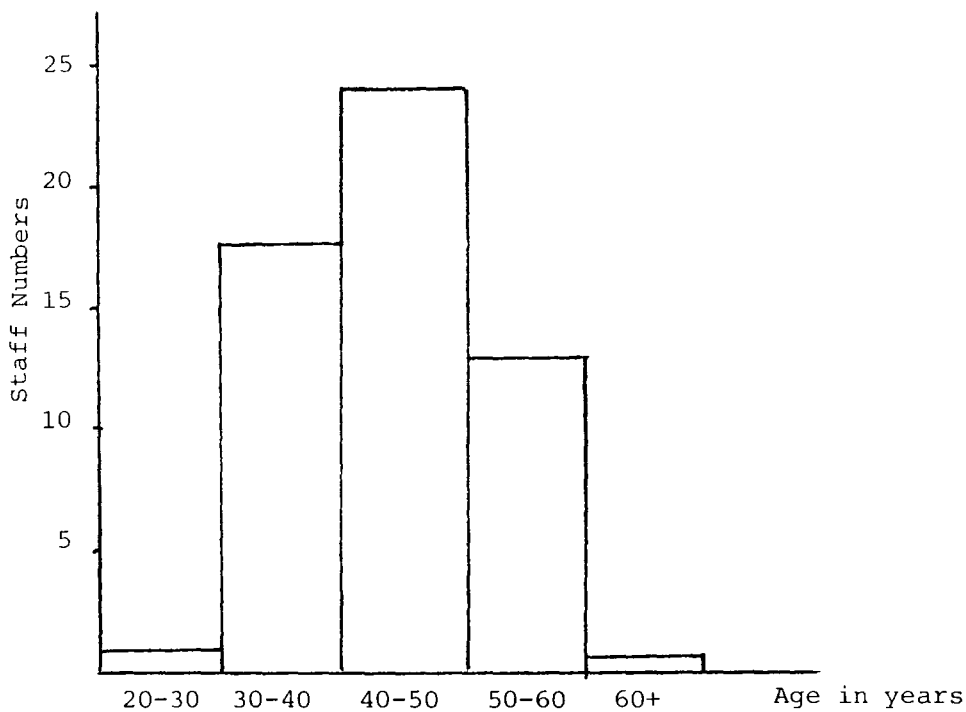
The methods used to shed staff within the County are the same as those in all the neighbouring authorities. It is probably nationwide since the only other real alternative is redundancy. This is a term from which all officials within the LEAs visited appear to shrink and certainly there are 'no redundancy' policies operating in all of them. The authority only gives temporary contracts to staff replacements; they also try not to replace staff if the school has a staffing surplus, i.e. they encourage flexibility within the staff. This latter method has been very successful in Brackenhoe School where, for example, one Science teacher has taken on an Electronics/CDT element so bridging the two areas of study very effectively. Perhaps it is this flexibility which will enable the curriculum to be maintained or even enriched if sufficient satisfactory courses and retraining programmes are available. Courses for teachers are costly and in Cleveland alone some £1,207,000⁵ was spent in 1985-6 on in-service training.

Over the past five years the trend for early retirement requests has been upward, peaking in 1984-5 as shown overleaf. The breakdown of these figures into the three levels of education, i.e. Primary, Secondary and Further Education, are shown for comparison purposes. It is interesting to note that the peak occurred one year after the biggest group of amalgamations had been effected; also that in the current year the number of requests has dropped considerably, possibly due to the pending pay awards, but all requests have been approved so far. The number of requests has meant that the enhancement allowed has had to be kept to a minimum thus causing a disincentive for people

<i>Cohort</i>	<i>Total no. of requests</i>	<i>Approved</i>	<i>Not Approved</i>	<i>Not Accepted</i>
1982-3	106	73	28	5
1983-4	144	120	17	7
1984-5	154	120	21	13
1985-6	135	105	16	14
1986-7 (up until March only 1987)	27	27	0	3
	+ 70 to go before the approval board board for August 31 1987			

<i>Sector</i>	<i>Primary/Special</i>				<i>Secondary</i>				<i>Further Education</i>			
	<i>82/3</i>	<i>83/4</i>	<i>84/5</i>	<i>85/6</i>	<i>82/3</i>	<i>83/4</i>	<i>84/5</i>	<i>85/6</i>	<i>82/3</i>	<i>83/4</i>	<i>84/5</i>	<i>85/6</i>
Requests												
Approved	42	55	54	48	26	45	46	41	5	20	20	16
Not approved	13	8	3	1	5	4	13	9	10	5	5	6
Not accepted	2	1	6	6	3	5	6	6	0	1	1	2

to leave. Within Brackenhoe the distribution of age in teachers is shown below.



This shows that a significant proportion of the staff in their 50s could leave if the incentive was sufficiently large. All of those people in the 50-60 range are highly paid staff, with one exception. In effect because of the low enhancement offered, staff eligible do not retire and therefore the promotion prospects of younger staff are lowered. This, coupled with the low number of new teachers being recruited nationwide, will result in two-thirds of the teaching force being 40+ by the end of this century.⁶

Redeployment of teachers within the County is effected by mutual agreement between the member of staff moving and the receiving Headteacher. An 'early warning' system is in operation with appropriate staff being alerted to vacancies before they are advertised in the local bulletin. Within any amalgamation or reorganisation some staff will not secure posts at their substantive levels; these people are then paid at their previous level while filling a post which does not justify that salary. These people are the most vulnerable since they are economic misfits. If staff and Head agree that the move is acceptable then the advisory service together with the two Headteachers agree on a mutually convenient date for the transfer. If the member of staff or the Headteacher does not support the transfer for legitimate educational reasons then the move may be refused. However, if it is refused by the teacher for other reasons the County has the right to reduce the salary to the level which the post actually justifies. The details of this procedure are set out in Appendix 5: Gateshead. One result of the recent amalgamations within the County is the large number of staff being paid at their substantive levels while occupying more lowly posts of responsibility. Within Brackenhoe there are seven of these in a staff of sixty-one. With the next wave of amalgamations now approved by the DES this number can only increase.

The Director of Education of Durham County produced a report in July 1980 for the County Council Education Committee, highlighting the problem of falling rolls in the secondary sector. It reminded members of the problems which had arisen in the primary sector in the late 1970s and also forecast those in the late 1980s as the school populations decline. Within this report the pupil numbers are shown until the end

of the decade and with them the reasoning behind the need for planning to deal with the problem. The decline within the County is the equivalent of closing eleven eight-form entry schools⁷, i.e. a fall of about 14,000 pupils. This was an opportune time for new strategies since the forty-eight secondary schools within the County were originally designed for 1,000+ pupils and by 1989 the average size would be about 750.⁸ The LEA had already decided in an earlier study that the optimum size for a comprehensive school was about 900 pupils.⁹ The report suggests strategies which could be employed within the County to overcome the problem.

As with Sunderland LEA, it was made clear to Education Committee members that if the outcome was to be amalgamations and closures then staff needed to be made aware of this before the local press published it.¹⁰ It is satisfying to note that some of the LEAs realised the importance of this; others may have been aware of it but did not ensure that it happened. In Cleveland the amalgamation of Brookside with Bertram Ramsey was leaked to the press before the staff of each school had been made aware and while the Authority apologised for this and agreed it was "unfortunate", it was then too late. The suggestions for amalgamations and closures are all put forward in the same pattern, i.e. looking at each school's roll for the next five years; the geographical location with respect to a possible movement of pupils from that school to nearby alternatives; the physical state of the buildings and finally a recommendation. These recommendations formed the basis for negotiation. Another report went to Buildings and Resources Committee which was similar in content but had a well-defined section on the effects of falling pupil numbers in schools if no action to streamline the

secondary sector was taken.¹¹ The streamlining proposed the discontinuation of 11-18 schools and the establishment of 11-16 schools and Sixth Form Colleges. It is unfortunate that these facts and proposals were not published for the general public, but only for Committee members.

The procedures which concerned staffing were published in February 1982. Redeployment procedure was clearly set out, including voluntary redeployment or secondment to other establishments. A new element was noted here in "Designated Transfers",¹² this is an area which in the other LEAs was left undiscussed. In the Durham publication it is offered as another procedure and when asked, the LEA representative agreed that this was the case. Other LEAs hoped that this would never happen since it causes confrontation situations and can be misconstrued. However, Durham firmly sets down the guidelines and is adamant that it has been used and would be used again. Premature retirement is dealt with as in the neighbouring LEAs, with each one judged on its merit and with the best economic terms for the Authority.

Over the past years Durham schools have had the reputation of being poorly staffed compared with other authorities. In January 1987 the Director of Education for Durham issued a statement to the press¹³ that the PTR in the Authority would improve from 16.5 to 15.6. This would mean that the 144 teaching posts due to be lost could be kept to a loss of 39, i.e. the number of requests for premature retirement: the Director himself plans to take early retirement this year. If this does indeed happen then the savings must be found elsewhere but the gesture could only be interpreted as one of support for teaching staff during the critical period of amalgamations and the onset of the GCSE examinations.

The reorganisation within Durham is not complete and, as in any other authority, by the time the current programme is completed then the next problem will need to be assessed, i.e. post-1991. All LEAs look to 1991 when a small rise in school population is due to occur, but it has to be remembered that it will not reach the peak seen in the late 1970s. The birth rate seems to have declined again and the slight rise in the early 1990s does not look as if it will be maintained.

Gateshead is a Metropolitan Borough LEA which at the present time is not amalgamating secondary schools but is undergoing equally disturbing changes due to a reorganisation of 11-18 education. There is currently a mixture of 11-16 and 11-18 schools; the change is to establish 11-16 schools and Sixth Form Colleges. The problems of this kind of reorganisation are very different from those of amalgamation and are not within the scope of this study. However there are some areas which are the same, i.e. redeployment procedures and early retirement schemes.

The Authority is, however, amalgamating infant and junior schools into a primary education system. This has been effected, as far as possible, in an ad hoc manner, taking advantage of situations which have arisen, e.g. when two schools on one site were left for whatever reason with only one headteacher, then that head was appointed for the amalgamated school. This causes little upset since both establishments tend to continue as they had previously. The Secretary of State is not involved in these since approval for the scheme has been granted and it is up to the LEA to effect the change as smoothly as possible. There

are exceptions of course; one being discussed currently is the Barley Mow Infant and Junior schools where the public notice stage brought sufficient objections to necessitate investigation. If at the public notice stage there is no response or it is not sufficient, i.e. less than 10 persons objecting, then the LEA is able to proceed without involving the Secretary of State. The proposal is that these two schools should amalgamate after August 31 1987. There is a problem here since there are two headteachers, neither of retirement age.¹⁴

The Gateshead LEA suffered from amalgamation problems in the early 1980s when there were changes made involving the closures of old buildings. The pattern of housing changed and there were schools under-used while others were at capacity. By rationalising the schools it was possible to withdraw old buildings from use and hence reduce the maintenance bills. At a conference at Beamish Hall entitled "Education in the 80s" in June 1981, Mr. R. Jobson, then Assistant Director of Education, discussed the amalgamations. He said that from the amalgamation of two schools the result had been "50 demotions and 2 promotions": this was a frightening thought at that time, but one which has now become acceptable. Though Gateshead is not undergoing the problems of amalgamation at present, it has had to cope with them in the past. Probably due to their past history, effective forward planning for the current change means that in the reorganisation programme much of the basic work has already been done. As staff have left over the past two years, only temporary contracts, or fixed term contracts, have been given to replacement staff: these make the reduction in staff numbers more readily achieved since these contracts are simply not renewed.

Gateshead's policy for the redeployment of staff is very similar to that of Cleveland as is that of most LEAs since they have to conform to the recommendations of the Burnham Report or Remunerations of Teachers Act of 1968.¹⁵

The Early Retirement Scheme follows a similar pattern in all the LEAs in the North East. Enhancement is being made to the best possible advantage of the local authority. From the information given Gateshead began the 1980s with a very favourable scheme with 100% enhancement if no replacement was needed or 50% if the retiring member was 55+ and a replacement was required. This was very generous and would have been expensive to maintain and so the scheme was revised in July 1985.

Having discussed the reorganisation programme with a representative of Gateshead LEA, there would appear to be opportunities for recruiting new staff as well as job enrichment for existing staff. Staff may be able to teach age-groups which they have not previously been in contact with. This is a positive advantage and must be morale-boosting for staff for whom there are few promotion prospects. The sensitive handling of staff in this way could avoid many frustrations and create an exciting climate with well-motivated staff for the new establishments.

North Yorkshire County Council Education Committee controls education in the largest county in England. There are over 500 schools in the county which vary greatly in size and type. For example, in most areas of the county the secondary education is of a comprehensive nature but there are still areas such as Ripon and Skipton where there is still selection at 11+. There are parts of North Yorkshire where the amalgamation of two or more schools would be economically desirable. However, since the geographical location of these schools is such that

this is impossible, then the Authority acknowledges that it must maintain some establishments which are expensive both in staffing and upkeep. Where it is possible to rationalise schools, i.e. in the larger urban areas and cities then this has occurred. Because of the geographical size of the county it is divided into five areas for administration purposes. Each area complies with the Authority's policy and there are no differences in procedures between areas. For this study I have used the York area as an example.

In the late 1970s York had already partially reorganised into a three-tier system of 5-9, 9-13 and 13-18. Within five years, another reorganisation programme became necessary. Between 1980 and 1985 when rolls were falling, it had been the policy of the Authority not to replace staff as they left and to make full use of the redeployment scheme to maintain the curricula of its schools. In July 1985 all the secondary schools closed. In September 1985 seven 11-16 comprehensive schools, one sixth form college and one Roman Catholic 11-18 comprehensive school opened. This was neither a true amalgamation nor simply a reorganisation exercise but a complex mixture of the two. Some 2,000 staff were involved, which was a massive exercise for the LEA to handle.

The York area had planned ahead for the falling roll problem because it was obvious that York would be among the first areas to be affected since there is little population migration from the area. The plans had included the distribution of a curriculum model (see Appendix 5: N. Yorkshire) by the LEA¹⁶ to ease the problems of maintaining a reasonable curriculum despite the reduction in staffing. The LEA was aware that key subject teachers would have to be retained in any circumstance but even of them some flexibility was required.

Perhaps the most significant recent development within the NYEC has been the production of a paper by a Working Party which examines the viability of schools. The initial paper of November 1986 suggests criteria for judging the viability of small primary schools with a question/answer type of format.¹⁷ It is clear and simple to follow and should enable all concerned to appreciate the nature of the problem. If staff and parents are aware that there are possibilities of school closures and amalgamations they can plan for the future rather than react to an unanticipated situation (see Appendix 5: N. Yorkshire).

From this background it is clear that North Yorkshire Education Committee and Authority are working towards the rationalisation of all schools within the area. In York this was completed for the secondary sector in 1985 with the minimum disruption. The reduction in staff numbers was effected by natural wastage and by the termination of short-term contracts which is now the accepted method of reducing numbers without resentment. Relocation of staff within the area was more readily achieved than would be possible in the more rural areas since the schools concerned are comparatively close together. The relocation procedure adopted by NYE Authority is similar to that of the other local authorities. This procedure is set out in Appendix 5: Gateshead, and there are no differences in the North Yorkshire Education Authority.

The early retirement scheme of North Yorkshire also follows the same pattern as that of Gateshead (see Appendix 5: Gateshead) with the emphasis on securing the best economic terms for the LEA. Since the number of requests for premature retirement increases annually, the LEAs cannot afford to be generous.

The actual amalgamation procedure is presented by the Secretary of State with only minor variations being possible and those only in the early discussion phases. Since this procedure is not set down by any of the LEAs I have contacted, I have summarised the main features putting in time scales and other relevant details.

1. Discussion of rationalisation of schools by Education Authority in response to 5/77 and 2/81 Papers from the DES.
2. Report to Education Committee.
3. Committee reply to report from LEA.
4. Scheme put to schools, governors, parents: public meetings arranged.
5. Feedback of information from the above meetings to Education Committee and LEA.
6. Public notices posted (8 weeks allowed for responses in writing to Committee).
7. Committee and LEA discussions of objections (if any).
(Objections may be withdrawn up to 4 weeks after closing of objection period - in writing).
8. Scheme from LEA and Committee to Secretary of State.
9. Reply from Secretary of State.
10. Information to schools and press.
11. Interviews for Headteachers.
12. Curriculum and structure from Head designate to LEA for approval.

13. Interviews for Deputies.

14. Interviews for staff.

In August 1983 the Borough of Sunderland produced a public document which collated all the information concerning the reorganisation of the education system within the area.¹⁸ It is concise and intelligible, but a simpler, shorter version was also published so that even the few who could not assimilate the larger booklet had an opportunity to become familiar with the main proposals. It is the only authority in the North East to have done this. It is an admirable publication and an example to neighbouring authorities of what can be done to prevent speculation and the spread of rumour. However, the assurances given by the Director of Education that "no decisions had been made"¹⁹ and that the booklet was "a consultative document"²⁰ were probably received with some scepticism as are most statements made by people in authority about contentious issues. The booklet sets out the pupil roll, the surplus capacity, suggestions for reorganising schools and the methods to be used. It is an effective document putting forward statistics and arguments in a logical sequence for each area within the Borough.

However, it was not until September 1985 that the LEA's proposals were finalised and published. In November 1986 the proposals with some minor amendments were accepted by the Secretary of State. Since the reorganisation within the Borough is not simply to amalgamate schools, but is also to change to a tertiary system, the time taken is usually longer. The Secretary of State put back the LEA proposals in some areas by a year and in others brought forward the dates by up to

two years. For example, in one area where three schools were to be amalgamated to form an 11-18 establishment, the completion date was brought forward from September 1989 to September 1987. This then had to be effected within eight months of the DES acceptance of the proposals. The time scale was extremely short for such a complicated exercise.

Once the Authority had clearly planned the way ahead, the problem of surplus staff had then to be tackled. The same policies were implemented as in other authorities. As staff left, only temporary contracts were given to replacement staff and where possible they were not replaced at all. Staff on temporary or short-term contracts were the first to go, unless they were teachers of minority subjects or in shortage areas. Those who requested early retirement were looked on favourably although the Authority had to ensure the best economic terms: enhancement was minimal. The numbers applying for early retirement are increasing countrywide and therefore the terms of enhancement are tending to become less than generous.

Sunderland's policies therefore are very similar to those of the surrounding LEAs. They have taken the current need to reduce places and hence staffing as an opportunity to restructure the Education Service within the County to make it more streamlined and coherent, rationalising the 11-16 range where possible and introducing a tertiary college.

An interesting comparison arises from this study of the North Eastern LEAs. The responses to the falling rolls and surplus places problem are shown in the table overleaf. An interesting exception is

<i>LEA</i>	<i>Reorgan- isation</i>	<i>Amalgam- ation</i>	<i>Vith Form Colleges</i>	<i>Tertiary Colleges</i>
Cleveland		✓	✓*	
Durham	✓	✓	✓	
Gateshead	✓		✓	
Sunderland	✓	✓		✓
N. Yorkshire	✓	✓	✓	

* Vith Form Colleges were already in existence.

Sunderland which established Tertiary Colleges rather than Vith Form Colleges. Being surrounded by other LEAs undergoing reorganisation, it might have been assumed that they would have followed a common policy. From the table it can be seen that most LEAs, with Cleveland as the exception, opted to reorganise the entire system while reducing the number of schools by amalgamations. Perhaps because Cleveland had already set up Vith Form Colleges the 11-16 range was more easily rationalised. A feature not shown on the table was that within each LEA separate Infant and Junior Schools were already combined, or were in the process of being combined under a single Head. This has wide-ranging effects on staff numbers, can facilitate the closure of buildings, and therefore the removal of surplus places.

Another outstanding difference amongst the LEAs was the way in which the suggestions for rationalising the schools, and the reasoning behind the suggestions were made public. Cleveland's public document-

ation was poor and the fact that staff learnt about amalgamations from the press was not only unfortunate but demoralising. The publications from both Durham and Sunderland were extremely good. They were clear, concise and above all, logical in approach. Both of these LEAs are to be commended in that they published as much information as possible, with suggested alternatives and the projected outcome of each alternative. In Sunderland the documents were put into the public libraries or could be collected from the Education Offices. In Durham they were circulated to Committee members and LEA officers only. N. Yorkshire had more problems in making the facts available to the public since each area had to be treated differently due to geographic location or other individual features. The result was that each area had a publication explaining the changes for that particular part of the County. The details for the proposals for this area which covered the entire reorganisation were so involved that they were not published but were available at County Hall for anyone who wished to inspect them. Notices to this effect were posted on public library noticeboards and in schools. Gateshead did not publish a booklet about the proposed reorganisation but since this was not truly an amalgamation this omission could be justified. In all only Sunderland prepared information especially for the public and did so in a highly acceptable manner. Durham, however, was the only County to state that it was important for those establishments involved to know what was happening before information went out to the rest of the public.

Legislation and nationally agreed procedures remove much of the LEAs autonomy when dealing with their staffing problems. In many cases the legislation protects but in others, where perhaps more

generous settlements or more realistic redeployments could be managed, it is limiting. The professional bodies have to take a global view and ensure the best terms for most members so it is the exceptions which tend to lose out. The agreements for redeployment of staff were drawn up in 1968 in the Burnham Report: the Remuneration of Teachers Act, with the agreement of the teaching unions. Early retirement schemes were not formally agreed until 1975 under the Employment Protection Act. The Superannuation Act of 1972 with the Redundancy Payment Act of 1965 have had effects in that they govern the maximum amounts payable. Details of all of these schemes and relevant legislation are published in the 'Burgundy Book' which is concerned with the Conditions of Service of Schoolteachers in England and Wales. Staff can consult this book in their schools or obtain it from their union representative.

As a teacher involved in an amalgamation, my criticism of all the LEAs is their apparent lack of concern for the people involved. The mechanics and logistics behind each school closure, reorganisation or amalgamation are no doubt highly sophisticated but the people-skills used are not of an equal standard. Of all the LEAs only Durham appeared to be aware of the need for personnel management as well as general management.

References

- 1 Times Educational Supplement, January 8 1982.
- 2 "Evening Gazette", Cleveland, August 6 1986.
- 3 *ibid.*, January 1987.
- 4 National Audit Office for DES: "Falling School Rolls", December 19 1986, No. 117, p.5, para.17.
- 5 Cleveland Statistics 1986, p.32.
- 6 DES Report No. 98, March 1983, p.5.
- 7 Appendix 5: Other LEAs: Durham: Director's Report, 16 July 1980, Summary.
- 8 *ibid.*
- 9 *ibid.*
- 10 *ibid.*
- 11 *ibid.*
- 12 *ibid.*
- 13 Darlington and Stockton Times, January 1987.
- 14 Appendix 5: Other LEAs: Gateshead.
- 15 *ibid.*
- 16 Appendix 5: Other LEAs: N. Yorkshire.
- 17 *ibid.*
- 18 Sunderland publication.
- 19 Sunderland Director.
- 20 Sunderland Director.

CHAPTER 3

THE INTRODUCTION OF THE IDEA OF AMALGAMATION

(looking at the two schools in question before the event)

The Process of Amalgamation of
Brookside and Bertram Ramsey

In Autumn 1981 there were many rumours that amalgamation of the two comprehensive schools, housed in three buildings, on the Prissick Base in Cleveland, was imminent. These rumours were a result of the County policy of reorganisation and rationalisation of schools in response to the DES Circular 2/81: Falling Rolls and Surplus Places.¹ Since the two schools in question were within 500 yards of each other and offered similar curricula it seemed amalgamation was the logical result. Also the Headteacher of one school was due to retire: an opportune moment!

Early in December the Assistant CEO (Secondary) and the Chief Adviser (also advisor to both schools) visited the schools to talk to staff about the possibility of amalgamation. The reaction of the two staffs was very different. The larger school, Bertram Ramsey (roll approximately 860) had expected it and had, to some extent, accepted the idea. The smaller school, Brookside (roll 650), had feared it and in no way was willing to accept it at that stage.² The rumours and suppositions had by that time become fact: amalgamation was being seriously appraised by the LEA. Parents of the present and the future pupils were next invited to an open meeting in the evening and again the reactions were very different - apparent acceptance by the larger school, since only 25 parents attended that meeting, and strong dissent from the smaller where attendance was around 200.irate parents who supported the small school ideal voiced their objections and the meeting was stormy.

At this stage the LEA and the Education Committee put forward three valid, as far as they were concerned, reasons for amalgamation, based on two Circulars from the DES: 2/81 Falling Rolls and Surplus

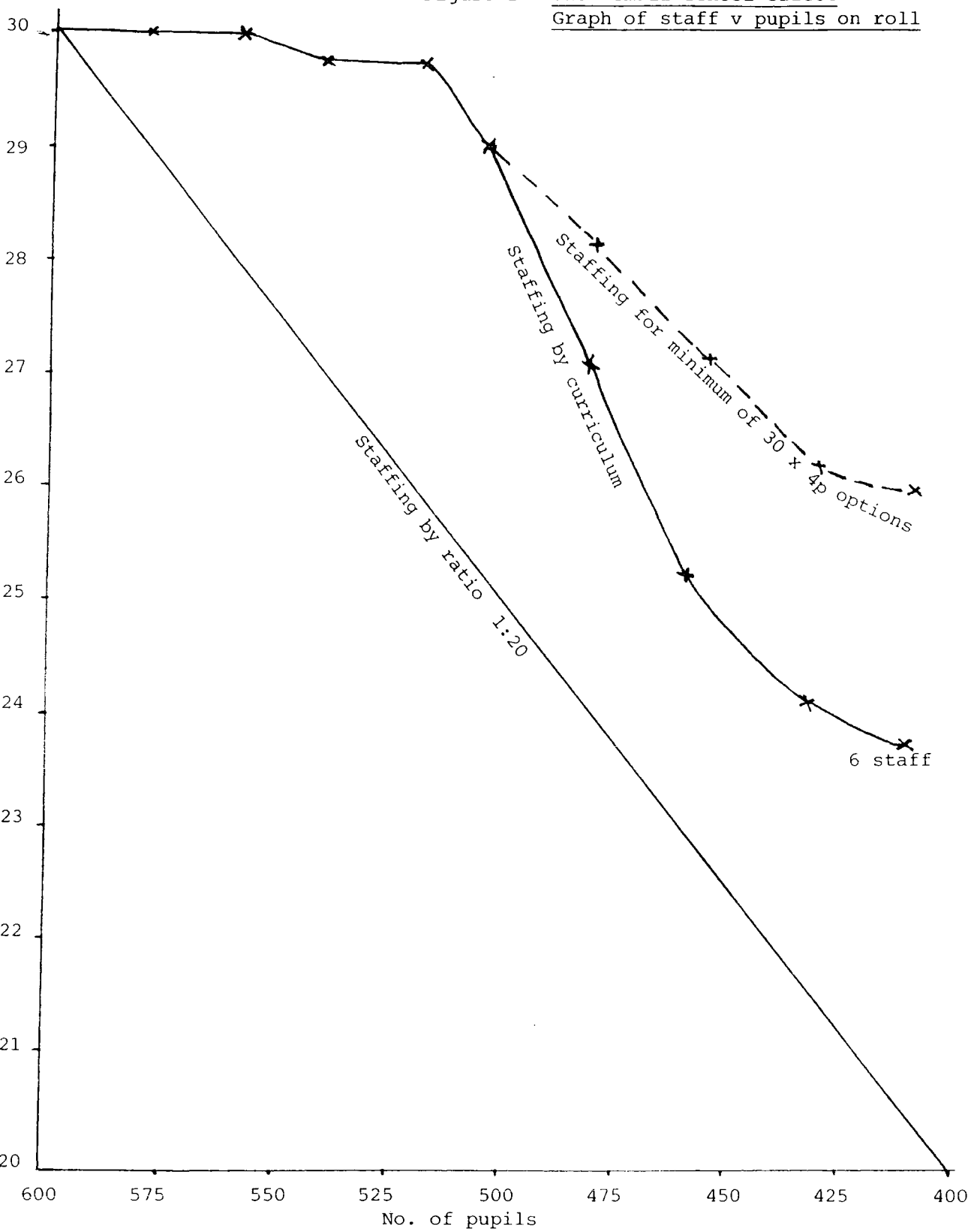
Places and 5/77: Falling Numbers/School Closures.³ They were:

1. The rolls of the two schools were falling and therefore there were spaces in terms of pupil numbers⁴ (see Appendix 1 - 5.5.2, p.8).
2. The economic factor of being able to remove one of three buildings from use and hence save on heating/lighting etc. since, numerically, the pupils could be accommodated in two.
- 3 The "small school effect" of Brookside School (see Figure 2).

Assurances were given to parents that the standard of education would not fall, the standard of care would not decrease and that the then current curriculum would continue. Repercussions followed; petitions from parents, pupils and staff were collected and duly forwarded to the LEA and Education Committee. Documents from the staff of both schools, either supporting or opposing, were submitted; these included one from the Head of Bertram Ramsey who was trying to maintain a reasoned calmness in a turbulent situation (see Appendix 2).⁵

While the arguments and counter arguments proceeded the deadline set by the Secretary of State, in DES Circular 2/81 Para. 27, i.e. December 31 1981, for the County's reply to the problem, came ever closer. Since logically and economically there was no viable alternative, other than maintaining two small schools which would be expensive and increase the small school effect on the base not decrease it, the proposal for amalgamation was duly sent to the Secretary of State, despite the misgivings of many.

Figure 2 The "small school effect"
Graph of staff v pupils on roll



At this point it is important to explain the background of the two schools, in particular the congruency of the curriculum and organisational structure within the two. In short how effective was each? Physically the two schools were very similar, both having been built in the 1950s; they shared ground facilities and had the same internal facilities like sports halls, labs., HE blocks, etc. Having stated these facts, the more elusive factors like management style, internal organisation and ethos/climate may now be examined. Congruency of curriculum and organisational structure within any school is essential for the sanity of both staff and pupils. Since I belonged to Brookside's staff, in fact as Deputy 1, I have chosen to describe in detail the organisation and curriculum of that school and will use it to compare and contrast that of Bertram Ramsey.

Brookside School : Roll 600

Organisation

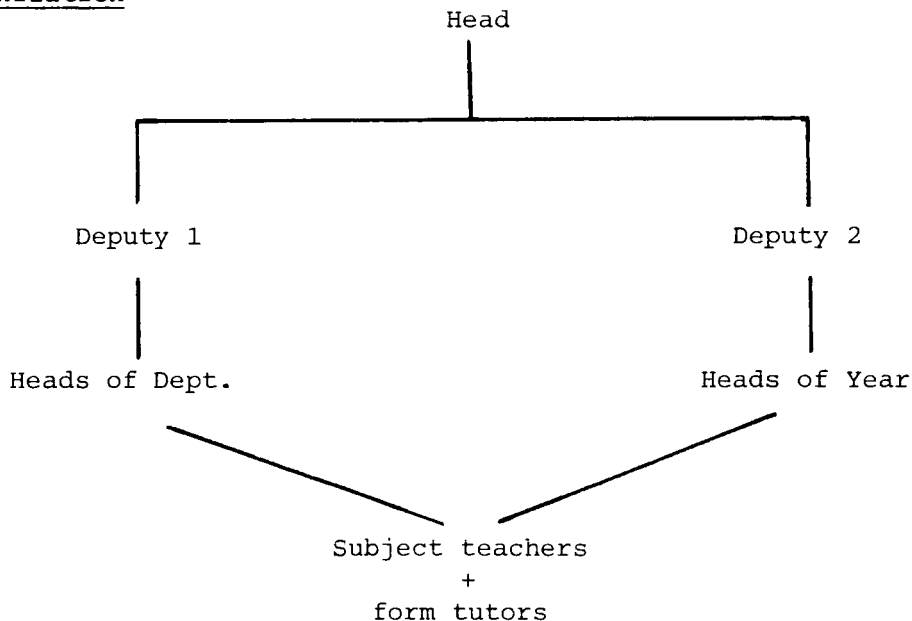


Diagram 1

The preceding table shows Brookside's triumvirate of managers and their supporting management team of Heads of Department and Heads of Year Groups. The two deputies, one male and one female, had distinct and differing roles. Deputy 1 had the overview of curriculum, timetable construction, management of external examination entry and liaison with Heads of Department. Deputy 2 had overall charge of pastoral matters, guidance, counselling and discipline and liaison with Heads of Year Groups. Already the schism between academic and pastoral matters is evident: Deputy 1 attended HOD meetings, Deputy 2 attended HOY meetings and the Head attended both intermittently. All staff belonged not only to their subject departments but also to a year group, most staff being form tutors. Tutors attended Year Group meetings with their Head of Year and departmental meetings with their Head of Department. It was only at this level that the boundaries between pastoral and academic matters became blurred.

Although each HOD belonged to a year group they saw themselves as academics and ran their departments on a subject, not needs, based ideology. There was very little inter-departmental communication and HOD meetings were fraught with misunderstandings or non-understanding. Each HOD guarded his/her domain jealously and appeared to regard communication about that domain as an intrusion into their own area of authority and hence a weakening of their own role, especially if enquiry was made in a meeting. Whenever the questions of time allocation, capitation, option groupings, etc. were asked, each one demanded more time, more money, more appearances on option tables, etc. - in short, more status for their own department. All seemed only to be

interested in their own department and uncaring of the need for an overview of the whole curriculum on offer. However, we had a very good academic record if that record is based on the examination pass rate criteria. Using Bernstein's model⁶ we operated a "collection code", not an "integrated code", with each specialist teacher teaching his/her own subject in a highly personalised manner with little regard as to how anyone else in the school worked. This method was successful with our brightest pupils, i.e. the top 20%, since they appeared to be stimulated into widening their fields of knowledge for themselves. Our remedial department, catering for the bottom 20% was excellent; without the constraints of examinations the knowledge content of its work was given less emphasis than the skill of learning how to learn. But we failed for many of the middle 60% - they left the school with unrelated parcels of knowledge (many could not relate facts learned, for example, in Biology to work in Home Economics); many were unable to make critical, logical appraisals of the work in which they had been involved for five years. We neglected the DES 1981 proposal (p.12)⁷ that:

"... schools should plan their curriculum as a whole ... the curriculum received by individual pupils should not be simply a collection of separate subjects."

I cannot, in fairness, say that the organisation of my school had any measurable, detrimental effect on the amount of knowledge learned, in fact it was possibly the reverse in that we were so exam-oriented, but the skills involved were of memorising and reiteration rather than enquiring, discriminating skills - it was a passive process rather

than an active one. But here the question of the validity of teaching facts must be posed since the knowledge content of many subjects now changes at such a rate that unless teachers see the curriculum as a "continuing process of evolution and planning"⁸ (Kelly, p.28) then the facts become valueless.

Having accepted that the knowledge content of the curriculum was not apparently adversely affected, the same cannot be said of the skills learned. At the transition period we performed a series of tests: the Richmond Tests on our children and built up from the results the beginning of a profile of skills for each child. We ran the next stage of these tests at the beginning of the 3rd Year and again used the results to continue the profile of each child. These profiles were available for all departments to use but they remained undisturbed in my filing cabinet from one year to the next. I have already said that inter-departmental communication was minimal but intra-departmental communication was almost as poor, only two of the major departments seemed to be aware of a need for checking on skill acquisition throughout the department and had a systemised approach to this checking; they were the Foreign Language department and the Remedial department. All others appeared to leave any skill acquisition to chance and certainly made no attempt to monitor this. We as a school ignored, for the most part, the recommendations of the DES, HMI, Schools Council and Bullock for a co-ordinated approach across subject boundaries. In his paper entitled "Curriculum Integration" (1970), Pring⁹ looked at a cross-curricular approach with support given to the ideal of a close liaison between departments so that subject areas did not have widely varying approaches. Because we

lacked any cross-curricular liaison our pupils must have lost out since in some learning situations, e.g. Sciences, Maths, Computer Studies, they were actively encouraged to develop an enquiring approach, while in History, Geography and English they were spoon-fed with carefully regulated amounts of facts. Since there was no uniformity of learning method the child had to adapt each time a different member of staff taught him. We did not encourage the child to reinforce the skills acquired in one subject area by requiring him to use those skills in other areas.

As a school we needed a co-ordinated, formalised approach to the acquisition of skills; we needed to set out skill targets and the methods to be used to achieve them as well as formulating a concise, precise way of appraising both the methods employed and the achievements made. Until we reached an accepted, overall view of the curriculum we, as an organisation, would never have achieved a means of assessing the effectiveness of our teaching or of our curriculum in terms of teaching skills or developing attitudes.

Our catchment took in an inner-city type area, through an old re-furbished council estate, a new selective council estate to a private development area for those aspiring to the middle classes. The attitudes expected at home in many cases were at variance with those expected in school and we had examples of disturbed behaviour probably resulting from conflicting expectations of peers, family and school. The pupils from the inner-city area were generally in our lower streams. We grouped our intake by the results of transition testing and Junior School reference. There was little mobility between streams - especially upwards - and they lived up to expectation,

i.e. a self-fulfilling prophecy. Marten Shipman expresses concern for this in his paper entitled "Curriculum for Inequality" (1969):¹⁰

"Academic, discipline-centred, formal, exam-oriented work for the few and integrated, inter-disciplinary work for the many, may divide education into two systems in the 1970s as effectively as selection has done in the past."

It seemed that my school was following just such a course of division. However, in the last year of Brookside's life changes had been made in encouraging pupils' attitudes towards an acceptable code of behaviour without the authoritarian overtones we employed previously. More positive rewards were being used with privileges for those who deserved merit and this was lessening the tension in the school. A happier, more relaxed atmosphere was developing, in school and staffroom, while standards did not appear to be declining. Out of school activities had also increased and attracted a fairly wide range of pupils, probably the most popular of these being a STEP course originally aimed at the less-able fifth year but which had a waiting-list for course membership! Within the school-day some attempt had been made to set up EPR courses across the whole age and ability range and, while some staff stayed non-committal, the pupils thoroughly enjoyed them and were developing some social awareness and self-knowledge. This manifested itself in an increased support for charity appeals, community work, hospital support etc. within our immediate environment. Voluntary work was undertaken by some, albeit only a few, but this was seen as a positive step towards community responsibility and positive attitudes to the world outside.

The major problem in my organisation was one of inheritance. The ex-headmaster, who retired just as amalgamation was suggested, was a strict disciplinarian and believed that if no noise was issuing from

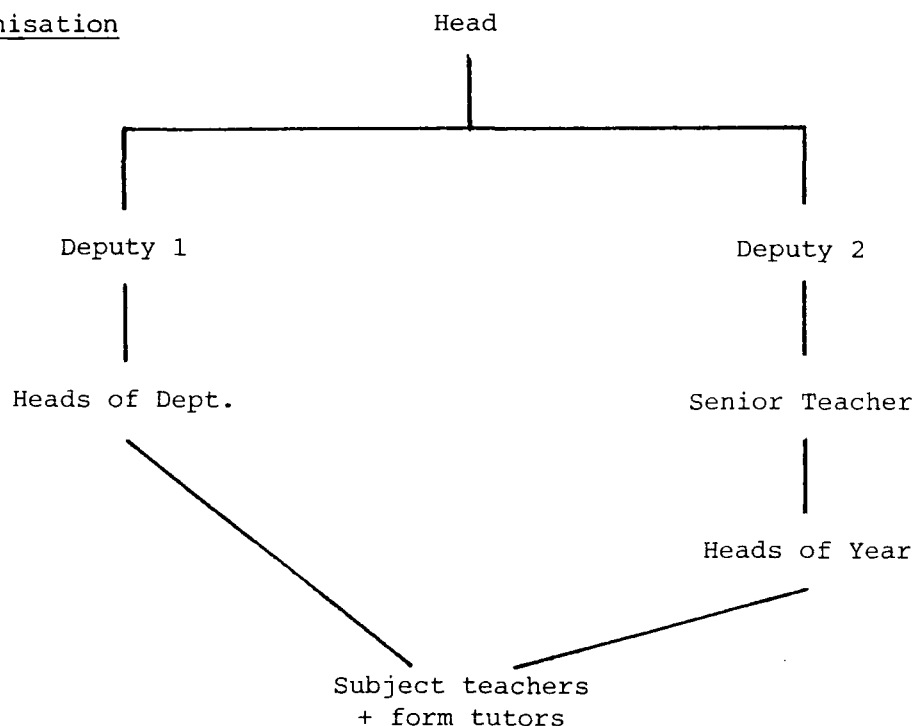
any classroom, then meaningful work was going on. His deputy was in his image; he became acting head when I took over the Deputy 1 appointment. Before this I was Deputy 2 and had just begun to make meaningful progress on the pastoral side. Amalgamation was imminent and the acting head began a waiting game: curriculum innovation, integration, appraisal were all desperately needed but did not occur as policy decisions were shelved. There was both time and opportunity to make radical changes, at least in areas where existing examinable courses would not be interrupted, but the opportunity was ignored.

To sum up, then, Brookside before the retirement of the Head had had a bureaucratic and mechanistic style of organisation; it had begun to move towards a more participatory and organic style after his retirement in the short period of 18 months before the amalgamation.

Much of what has been written about Brookside's organisation obtains for Bertram Ramsey.

Bertram Ramsey : Roll 950

Organisation



The organisational form was exactly the same as at Brookside, as were the duties of Deputies, HODs and HOYs. The schism between pastoral and academic staff existed in this school also. One telling difference occurred in the pattern of meetings: in Brookside the Head attended irregularly the HODs' and HOYs' meetings, whereas in Bertram Ramsey there was a more formal approach with the Head attending regularly. The struggle of HODs and HOYs for power and status was apparently very similar but with more emphasis on the pastoral side in the everyday running of the school. HOYs dispensed discipline rather more than those in Brookside where everyone was involved. Authority in Bertram Ramsey appeared to come from the pastoral staff and the HODs and not from the Head who appears to have kept his role distance. In this sense the management styles varied tremendously. Simplistically, Brookside's Head was authoritarian while Bertram Ramsey's Head was *laissez-faire* - neither statement is completely true but those terms used in the famous Lippett and White experiments¹¹ serve to give the broad picture. The general atmosphere in Bertram Ramsey was noisy with children always up and about in classrooms and corridors; the whole feeling was very different from the quiet orderliness of Brookside. However, I am assured that in fact the apparent involvement in participative learning by the children was superficial and that Bertram Ramsey had the same problems as Brookside with each department having its own methods and a lack of any overview of the curriculum. Departments had their own methods of evaluation but there was no ordered approach or inter-departmental links to encourage the acquisition of skills and the ability to transfer them from one subject to another. It would seem that the same criticisms can be levelled at

Bertram Ramsey as at Brookside and so, even in our failures, the two schools were alike.

Having looked at the two schools, the question must be posed: why were parents and staff opposed to amalgamation if in fact the two schools were so alike? Perhaps the answer was that Brookside gave the impression of having a more academic, formal approach to education, with firm discipline and strict rules, while Bertram Ramsey did not. The parents and staff who approved of the formal approach dissented, while the others who may not have been in favour of amalgamation and all the upheaval it must cause, were willing to accept change as a necessary step.

It is pertinent to note that although geographically the two schools were very close, there was a definite competitiveness between them and the staffs did not mix with one another. We might have been miles apart for all the integration which had occurred over the years. All of us were quite convinced that we worked in the better school, had higher standards and had nicer children: we could not all be right.

On 26 November 1982 a letter was issued by the LEA advising the staff of both Bertram Ramsey and Brookside of the acceptance by the DES of the proposed amalgamation of the two schools.¹² At the request of the Headteacher of Bertram Ramsey School, a meeting took place of the management teams of both schools on 29 November.¹³ At that meeting it was made clear that only one candidate for the position of Head of the new school was eligible to apply, i.e. the Head of Bertram Ramsey. At this time only the unlikely event of that candidate not being appointed would have made the staff of Brookside see the merger as anything but a take-over by the larger school.

When the approval of the DES was received by the LEA there arose a question, which to anyone not directly involved may seem to be irrelevant, i.e. what to call the new school? On this site there had been before 1960 and the advent of comprehensive education, three schools, one a Technical School for Boys called Brackenhoe, and two Secondary Schools, Brookside and Bertram Ramsey. When these schools were reorganised the Technical School and Bertram Ramsey Secondary became one school, i.e. Bertram Ramsey Comprehensive and Brookside remained on its own. Now it was time to name the new school and staff and parents were asked for suggestions. It was psychologically important that neither name was retained, since whichever one was rejected would certainly make the personnel from that school feel as if they had been "taken over". The name Brackenhoe is that of the previous landowners of the site on which the schools are built and, since it was acceptable to all concerned, it was adopted for the new school.

The staffing of the new school began with the official appointment of the Head Designate. His interview and appointment took place in December 1982. In the Spring Term of 1983 the Head Designate produced his suggestions¹⁴ for the organisation of the new school: this had to be approved by the LEA. His task was to ensure that all staff involved were to have meaningful jobs and not just titles. Since there was considerable weighting at the higher pointed posts it was necessary to introduce a system in which these people were used to best advantage. The school had been placed in the Group 11 band and in the second quartile: 116, i.e. having 66-79 points available. This was a generous allowance granted for the interim period while the Fifth Year

groups of each school completed the courses in which they were involved. Staffing numbers were to be reduced to 82.5 staff, a loss of 8.6 for the first year of the new school.

The task of the LEA was to appoint the most appropriate staff to fit the new school's structure. There were excellent people on both schools' staffs but some selection had to be made. At the same time as this amalgamation was occurring another two schools in the Authority were undergoing a similar process (see Appendix 1). The officers and advisory staff worked at full stretch to ensure that the new schools were staffed and ready to function for the new academic year. There were less than seven months to complete all the necessary procedures for this, to begin redeployment of displaced staff and to negotiate early retirement schemes. The teaching staff may have felt that the LEA was uncaring, indeed this opinion was voiced regularly, but in the context of the schedules of the officer in charge and of the advisory staff involved, this was unjustified. What was unrecognised by teachers was that they had a far wider view than we had and far more information to work from than was imagined. Even before amalgamation was heard of on the base, possible structures were discussed and predictions were made, or at least intelligent guesswork was used to determine possible staff placements and early retirement requests. The LEA always stated that there would be no redundancies because of amalgamation and therefore natural wastage was the only way in which to reduce staff numbers.

Once the structure was accepted by the LEA the business of amalgamation began in earnest since the two schools were to become one in September 1983; only six effective months in which to complete the whole process and for the school to be ready to open. The Deputy Heads were

called for interview late in January 1983: four people, myself included, all of whom qualified for the two posts available. Two senior staff had then to be deposed and either relocated or have their salaries maintained while they occupied more lowly positions. In fact one retired, i.e. the one who had run Brookside as the Head for the previous 18 months, and one was redeployed into an equivalent post. The interviews were held at the Education Offices and all four of us were ushered into a small waiting room. We were called for interview in the following order: Deputy 1 Brookside; Deputy 1 Bertram Ramsey; Deputy 2 Brookside; Deputy 2 Bertram Ramsey. The usual selection committee was present for that level of post and the Head Designate was also present: psychologically bad for the two from Brookside as we both felt that he knew his own Deputies very well - both had been with him for his entire career at Bertram Ramsey - and did not know us at all. We were told by the selection committee that in fact the Head Designate was not there to ask any questions or to give his opinion on the interviews - even worse knowing that every word was being processed and evaluated in a detached manner. It did not help when the two successful candidates were invited back to the selection committee, leaving colleagues behind to be told quietly that they would be contacted about their future careers! I was appointed as Second Mistress/Deputy 2. The Head Designate tried to bridge the gulf between the two staffs by suggesting meetings either of a formal or informal nature but by the time the interviews started many had not even met their counterparts from the other establishment. It seemed that staff believed that the selection of staffing had already occurred and that the process was simply acting-out the necessary charade.

Before the interviews took place the proposed format for staff was published in both schools with guidelines explaining who could sensibly apply for which jobs.¹⁵ Some of the jobs were self-explanatory and the candidates obvious, but the new posts, such as Head of Faculty, Scale 3 for Evaluation and Extension, were not quite so clear. This in itself caused concern and staff became wary of any innovation which appeared, always questioning and yet not believing any answers given. It was all viewed as being highly political and a money-saving exercise, having little regard for the personnel involved. The morale of the staff was abysmally low; everyone was slightly off-balance, not really knowing with any degree of certainty what was going to happen to them. Yet curiously, each staff became more united within those few months, gathering strength from each other and finding comfort in the knowledge that many felt the same way.

In Brookside I ran many meetings with any staff interested in the process and philosophy behind the amalgamation. I tried to defuse an unpleasant situation by sharing any knowledge I had with the rest of the staff. I believed that the only way to ease the way was to continue being the Deputy of Brookside first and the Deputy designate of Brackenhoe second. I must make it clear that I was not privy to the reasoning behind the staff format for the new school and I was never approached by the Head designate for any opinions at this time. I ran the meetings with four points in mind:

1. To create awareness of the procedures;
2. To encourage acceptance of the amalgamation and positive attitudes towards it;

3. To evaluate the individual's position and help those who could not evaluate the situation for themselves;
4. To make plans for role acceptance in the future establishment, knowing that the individual might not be successful in the appointment.

I acted as a change agent in the sense which Bennis¹⁶ uses the term, and indeed, Robert Chin¹⁷, who postulated that:

"new people technologies must be experienced, understood and accepted by teachers and administrators before they can be used effectively with students."

How could we as staff expect co-operation and understanding within the new situation if we ourselves did not understand or co-operate in the process?

The programme of interviews began. An assurance had been given by the LEA that staff already in the two schools would be given first chance of any position within the new school. There were still doubts being voiced about the truth of that statement and anxiety showed itself in most faces with "that continual 'out-there' gaze"¹⁸ and little eyeball contact.

The posts for the next tier of management, i.e. the Heads of Faculty, were the first for which interviews were held. They took place at the Education Offices and at those interviews were present senior staff from other bases who were eligible to apply. They started in the early afternoon and were completed at about seven in the evening. Four of the five posts were given to incumbents who were already on Scale 4 posts. The others who were not appointed simply returned to the pool. At the onset an assurance was given, due to

union pressures in the 1960s when this type of process had occurred before, that although personnel were not appointed to the scale post for which they were being paid, the salary would remain the same, i.e. nobody would lose money because they failed to be reappointed to a post which they already held.

The next series of interviews was fraught with difficulties: personnel on Scale 3 posts often wear two hats, i.e. were eligible to apply for more than one post and invariably that is what happened. So when any Scale 3 interview occurred the successful candidate was not necessarily informed since the appointments had a knock-on effect to another appointment, e.g. one man applied for three posts, was successful in one but could not be told until all three interviews had been completed; a time-consuming and exhausting exercise for all concerned.

These interviews took place on the base. The Head designate organised these so that for each post the interviews occurred in each school on an alternative basis, so that no staff could say that there was any unfair advantage of being on home ground. This resulted in senior personnel dashing back and forth for interviews. The Acting Head of Brookside, who had decided to retire since he was not appointed to the new school, felt distinctly *de trop* when his office was used for interviews in which he had no part. This I felt was insensitive and unnecessary, since in the period between the appointments of the two deputies of the new school and these interviews, there had been no contact from the LEA concerning his future career and other offices were available.

In the staffroom at Brookside a league table was pinned up and after each round of interviews this was updated and a tally kept of which parent school the successful candidate came from. It became a release of tension for staff to fill in the chart and to see how the "league table" was looking; but the anxiety remained.

The Scale 2 appointments and Scale 1s followed the same pattern as the Scale 3s. Often interviews were held in the mornings and again in the afternoons. The time taken was reduced as the Scale posts diminished in status. At various times other personnel from other bases were present at interviews where there was no incumbent and staff from the base were applying for possible promotion or a new appointment not previously present in either establishment. In one such case an outside applicant was successful and there was, and still is, much resentment felt by the other home-based applicants. This was seen as being a denial of the assurance given by the LEA; however it was not, since the post did not have an incumbent suitable except by promotion. Promotion was scarce, in fact only five promotions in all were made, three of which went to Brookside personnel (myself included; I changed from Group 10 to Group 11).

Within the staffing structure devised by the Head designate, there were various staff who by nature of their current jobs, did not have a job for which to apply. Strange titles were devised, usually suited to one particular member of staff so that most had an area of responsibility by the time the interviews ended; some still do not.

When all the interviews were over and posts were settled there was the task of devising titles for those on Scale posts who had not

been appointed to the obvious post. We have many highly-pointed post holders who are actually doing Scale 2 jobs; one for example is a previous Head of Department from Brookside paid on a Scale 4 but actually being a substantive 2 in the current department. The more professional ones of the deposed Scale post holders realise the situation which has arisen is beyond the control of anyone in school and simply 'get on with the job'. There are some who are still extremely resentful towards the successful post-holder and are being as awkward and unsupportive as they possibly can. This leads to confrontation and even more stressful situations occur.

Dr. John Isaac¹⁹ postulates that there are four major factors which should be taken into account in any amalgamation situation: (1) self-esteem; (2) anxiety; (3) role and (4) territory. None of these factors can be viewed in isolation from the rest since they are all equally important and inter-related. All of the personnel involved with any amalgamation need to be aware of the effects of these factors if the resultant staff is to avoid having the debilitating feelings caused by poor management. It is unfortunate that when many staff are in need of reassurance from the Head or the LEA the pressures are so great upon these people that there is little opportunity to give that reassurance. At amalgamation I felt it my responsibility to try to remedy and consequently I held my meetings. Since the staff of Brookside tended to seek me out regularly I was constantly aware of the level of anxiety of many staff. This need to be close to a member of senior staff appointed to the new school is one which is not unusual and is supported by John Isaac's research. So the personality and the managerial skills of that person become of paramount importance.

With this support the whole situation can become less fraught and the attitudes of staff can assume a positive tendency rather than the reverse. In future amalgamations it may be a positive step forward if the appointed senior staff were actually directed to carry out this personnel function and not leave it to chance. I wished to understand the amalgamation process either at a formal or informal level which is why I took the opportunity to study it as it occurred at my own school. Perhaps this knowledge made me more aware of the procedures; it certainly encouraged me to document them and to read the relevant research studies.

Throughout the interviewing programme those people who had chosen to leave, either for early retirement or to do other things, were able to take a detached view of the proceedings since they would not be personally affected by the outcome. Those who left Brookside were relieved to be going; they had been part of a small, closely-knit community and to many of them "small was beautiful".

At the end of the Summer Term of 1983 the two schools closed. The administrative tasks necessary for the new school to open, such as timetable, day to day procedures, organisation of duty teams, etc., were completed by the two deputies and were as ready as possible for September and the beginning of the new school: Brackenhoe.

At the initial meeting with the Assistant CEO and the school advisor, the time scale was discussed and there were hopes that the Secretary of State would agree to September 1984 as the formal date of amalgamation. This would have given an extra year in which to complete the procedures. In retrospect it was probably an advantage

that the amalgamation was completed in September 1983 because more time would not necessarily have improved the result. Certainly during that period the LEA officials involved were over-worked but there was a clarity of purpose and a continuous focussing on the problem. Having discussed this with the officials they agreed that in retrospect it was better to have it completed as quickly as possible.

References

- 1 DES: 1981 Circular 2/81 "Falling Rolls and Surplus Places".
- 2 Appendix 1: March 1982 Middlesbrough and South Teesside County Comprehensive Schools, "Pupil Forecasts and Surplus School Places", Para. 2.2.5 ii and iv.
- 3 DES: 1977 Circular 5/77 "Falling Numbers/School Closures".
- 4 Appendix 1: op. cit. October 1981. Para. 5.5.2, p.8.
- 5 Appendix 2: January 1982 "Cases for and against Amalgamation of Brookside and Bertram Ramsey Schools".
- 6 Bernstein, B.: 1971 "Education Cannot Compensate for Society", in Cosin, p.61-6. Routledge and Kegan Paul.
- 7 DES: 1981 "The School Curriculum", p.12. HMSO.
- 8 Kelly, A.V.: 1982 "The Curriculum - Theory and Practice", p.28-9. Harper.
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- 13 *ibid.*, p.3.
- 14 *ibid.*, pp.4-7.
- 15 *ibid.*, pp.8-12.
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CHAPTER 4

THE CURRICULUM ANALYSES OF THE
THREE SCHOOLS UNDER INVESTIGATION:

Brookside
Bertram Ramsey
Brackenhoe

At the preliminary meetings with the Assistant County Education Officer and Senior Adviser certain assurances were given to both parents and staff of the schools. At this stage it is possible to look again at these assurances and to assess the truth and indeed the practicality of them. To do this three areas will be examined:

1. The present curriculum of Brackenhoe in order to assess growth or contraction with respect to the two original schools;
2. The cost-effectiveness of the operation;
3. The children's reaction and the staff reaction.

This last point will be examined in more detail in a later chapter. The three areas have been chosen because they are all susceptible of objective analysis, e.g. staffing ratios, curriculum content, curriculum costing and the effectiveness of staffing and facility deployment. Ethos and climate are difficult to evaluate since they are personal value judgements and hence subjective observations which cannot be factually upheld. For these analyses T. Davies' method has been used, all the symbolic notation and details are given in Appendix 4, but results are tabulated where possible and the essential points are discussed. All three schools are examined individually and all three compared. The analyses for the original two schools were for the last academic year in which they existed separately, i.e. 1982-3, and that for the new school was for 1985-6. This is the first true curriculum for the new school since the years 1983-4, 1984-5 had the upper schools of both schools passing through, completing courses to which they were committed pre-amalgamation.

Brookside School:

Brookside pupil numbers and the distribution are shown in Table 1.

Table 1

To show pupil numbers and distribution
in year groups for Year 1982-3

<i>Age in years</i>	<i>11</i>	<i>12</i>	<i>13</i>	<i>14</i>	<i>15</i>	<i>Total</i>
Boys	58	60	52	46	56	272
Girls	60	64	63	73	62	322
<i>Total</i>	118	124	115	119	118	594

Staffing Total = 36.2

Therefore Pupil/Teacher ratio = $\frac{594}{36.2} = 16.4$

Using T. Davies' notation for curriculum analysis as follows:

- N = number of pupils
- T = number of staff
- n = number of teaching spaces
- C = contact ratio
- X = number of curriculum units
- B% = relative bonus

Stage I: Counting "Teacher Periods"

Using the information from Table 1: the ringed numbers are teaching periods; by adding these we get the total number per year group:-

$$\begin{array}{lcl}
 \text{4th Year} & \text{Pupils} & = 119 \\
 & \text{TPs} & = 244 \\
 \text{4th Year provision} & = \frac{244}{4.44} & = \underline{54.95 \text{ cu}}
 \end{array}$$

$$\begin{array}{lcl}
 \text{5th Year} & \text{Pupils} & = 118 \\
 & \text{TPs} & = 244 \\
 \text{5th Year provision} & = \frac{244}{4.44} & = \underline{54.95 \text{ cu}}
 \end{array}$$

Stage III: To work out "Basic Provision"

By dividing number of pupils per group by 3.

$$\begin{array}{lcl}
 \text{Year 1} & \frac{118}{3} \text{ pupils} & = \underline{39.33 \text{ cu}} \\
 \text{Year 2} & \frac{124}{3} \text{ pupils} & = \underline{41.33 \text{ cu}} \\
 \text{Year 3} & \frac{115}{3} \text{ pupils} & = \underline{38.33 \text{ cu}} \\
 \text{Year 4} & \frac{119}{3} \text{ pupils} & = \underline{39.66 \text{ cu}} \\
 \text{Year 5} & \frac{118}{3} \text{ pupils} & = \underline{39.33 \text{ cu}}
 \end{array}$$

Stage IV: Work out "Bonus"

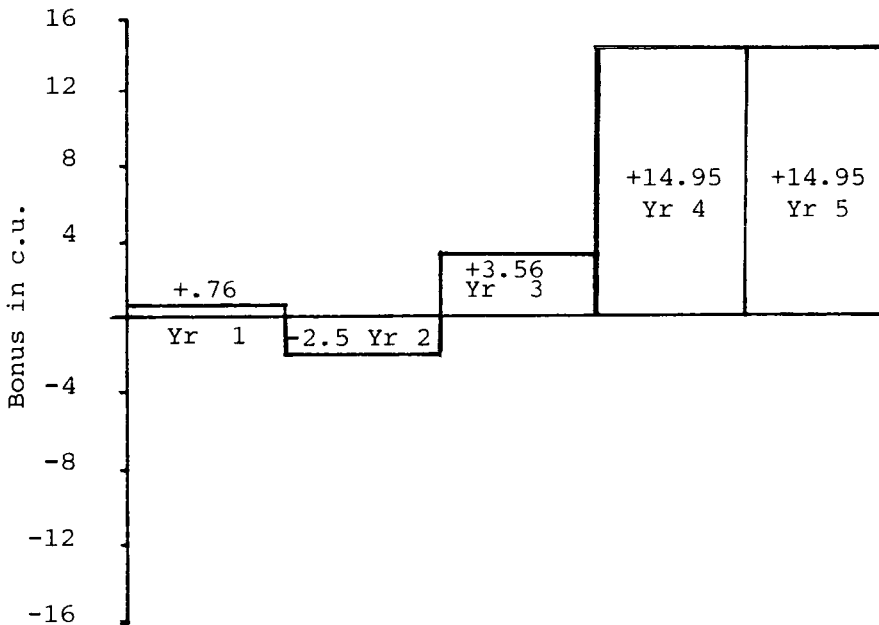
Bonus is defined as: (Actual provision - Basic provision) c.units.

Therefore:-

1st Year Bonus	=	40.09 - 39.33	=	<u>.76 cu</u>
2nd Year Bonus	=	(39.5 - 42)	=	<u>-2.5 cu</u>
3rd Year Bonus	=	(42.56 - 39)	=	<u>+3.56 cu</u>
4th Year Bonus	=	(54.95 - 40)	=	<u>+14.95 cu</u>
5th Year Bonus	=	(54.95 - 40)	=	<u>+14.95 cu</u>

Table 2

To show "Bonus" distribution



Scale: 1 cm represents 4 bonus cu on y axis
 2 cm represents 1 year group on x axis

Working on Davies' theory it would appear that in the first year class size is approximately 27, i.e. zero bonus - true because our average class size was 29.5, in second year a bonus of -2.5 cu shows an average class size of 27+ - again true since our average was 31. In third year a bonus of +3.5 shows an average class size of <27, and fourth and fifth years each having a bonus of 14.95 shows average class size as <27: in each case it can be seen that while we allowed classes in option groups to run at numbers of 7+ the average size would always be less than 27 since no class was ever greater than 30.

Continuing, using T. Davies' notation for the curriculum equation $X = 9 CT$, then:

$$232.05 = 9 \times C \times 36.2$$

$$C = \frac{232.05}{9 \times 36.2}$$

$$C = \underline{0.712}$$

So our contact ratio was 0.712 - fairly low. This suggests that we perhaps had more staff than we really needed!

Our bonuses in cu = actual provision - basic provision

$$= 232.05 - \frac{(594)}{(3)}$$

$$= 232.05 - 198$$

$$= \underline{34.05}$$

Hence the relative bonus for the school b% may be calculated:

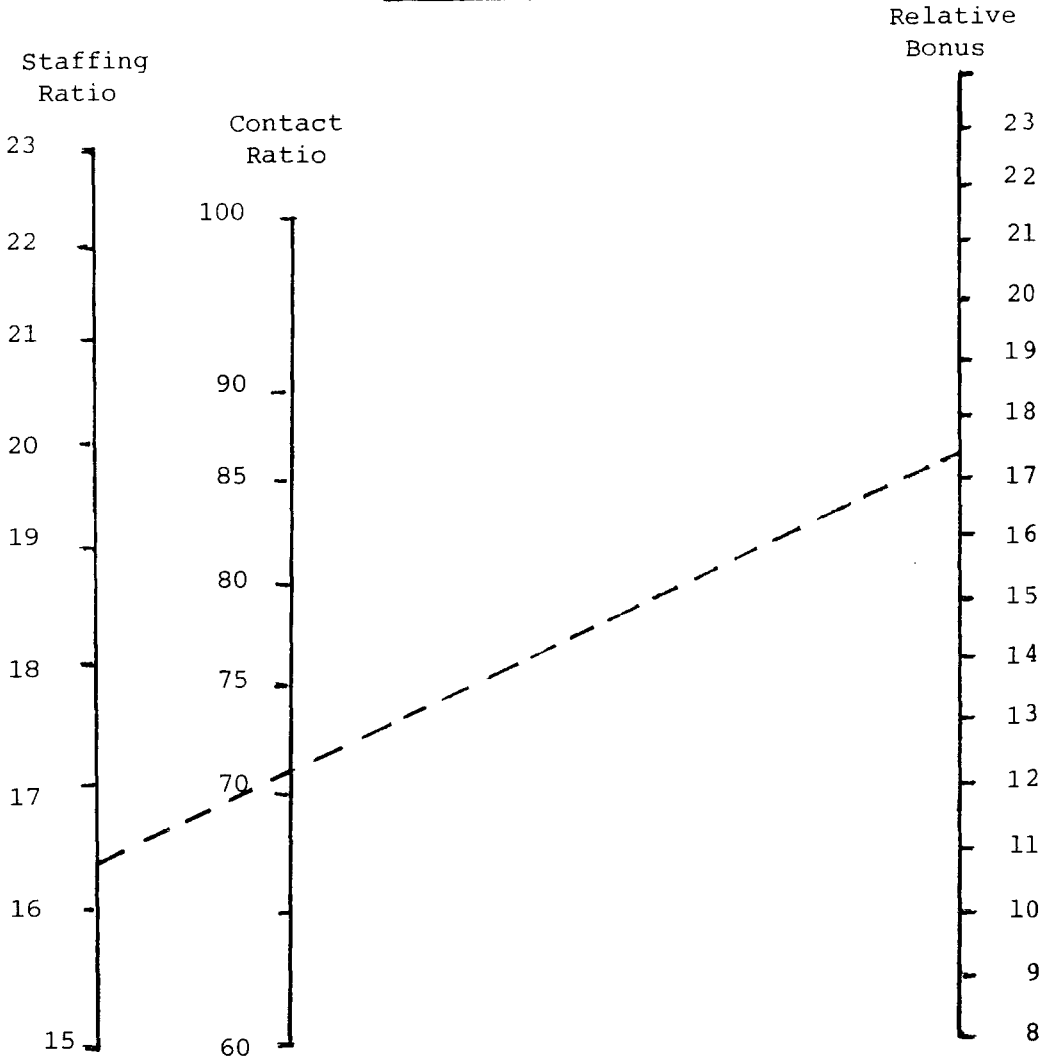
$$b\% = \frac{\text{total bonus cu}}{\text{total basic cu}} \times 100\%$$

$$= \frac{34.05}{198} \times 100$$

$$\underline{b\% = 17.19} \quad (\text{see Table 3})$$

Table 3

The nomogram



A line joining staffing ratio with contact ratio, if projected, will show relative bonus.

Since HMI recommend that a range of relative bonus of 10 to 20% is acceptable then we appeared to be within the accepted range.

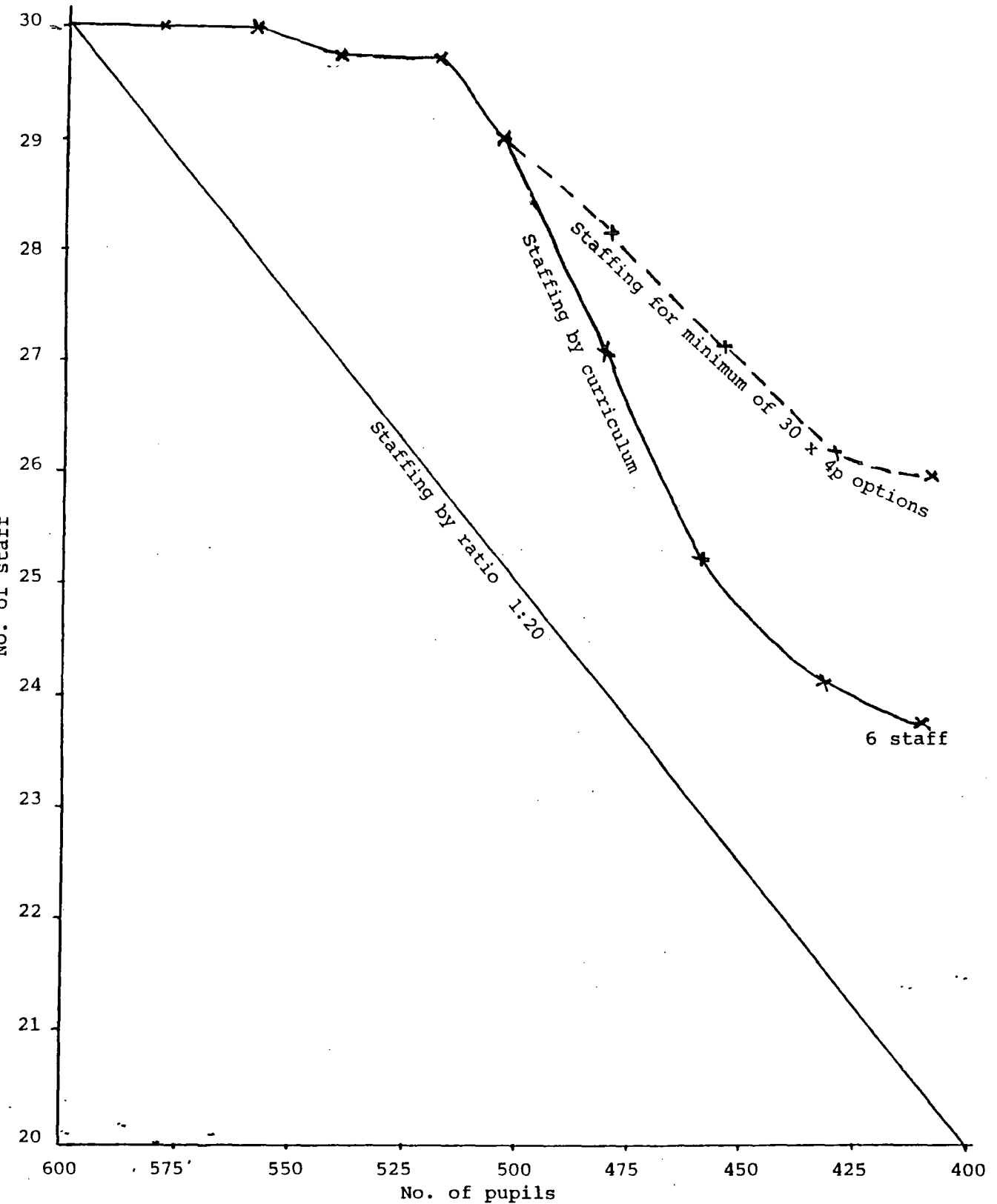
Using all the previous data the question of fairness of distribution of bonus must be considered - we taught most classes in 1st and 2nd years as full classes, except in practical areas, while in the 4th and 5th years we allowed option groups to run with as few as 6 pupils. To be fair the viability of such groups should be seriously queried since the lower end of the school would benefit tremendously from smaller group size, e.g. in the introduction of a foreign language, in mathematics sets and in science.

Being such a small school we also had to consider the "small school effect" on our curriculum as we tried to offer as wide an option choice as the larger schools. From Table 4 it can be seen that if we had been staffed by direct staffing ratio of approximately 1:18 then we would have had a shortfall of staff to offer the curriculum as it stands: in effect we would have lost approximately 3.2 staff which, assuming contact ratio to be stable, would mean a loss of approximately 20.46 cu.

$$\begin{aligned}
 \text{i.e. } 3.2 \text{ staff} \times .71 \text{ contact time} &= (3.2 \times 28) \text{ teaching periods} \\
 &= 90.88 \\
 &= \frac{(90.88)}{(4.4)} \text{ cu} \\
 &= \underline{20.46 \text{ cu}}
 \end{aligned}$$

This is 'actual provision' we would lose since 'basic provision' would remain the same.

Table 4

The "small school effect"Graph of staff v pupils on roll (600 pupils)

$$\begin{aligned}
 \text{Therefore Bonus} &= (\text{actual} - \text{basic}) \text{ provision} \\
 &= ((232.05 - 20.46) - 198) \\
 &= \underline{13.59 \text{ cu}}
 \end{aligned}$$

Therefore Relative Bonus would correspondingly drop (see Table 2):

$$\begin{aligned}
 b\% &= \frac{\text{bonus}}{\text{basic provision}} \times 100 \\
 &= \frac{13.59}{198} \times 100 \\
 \underline{b\%} &= \underline{6.87}
 \end{aligned}$$

Since this would then be lower than the recommended lower limit from HMI for curricular flexibility the contact time would have to increase to maintain the status quo.

$$\text{If} \quad C = \frac{X}{9T}$$

$$\text{Then} \quad C = \frac{232.05}{9 \times 33}$$

$$\underline{C} = \underline{.78}$$

The contact ratio would need to increase to .78, but in real terms this would mean a teaching load of 31/32 periods out of a 40 period week - is that horrendous? Hence my earlier suggestion of being very generously staffed ... not over-staffed! However since we were staffed according to curriculum our staff allowance was generous and allowed us the flexibility to achieve the curriculum capacity needed for the option system we employed. It is obvious from Table 4 that our 'bonus', in the main, was used in the upper school and since academic achievement was one of our prime criteria then our loading of bonus could not have been too far awry. Now let us look at a similar exercise for Bertram Ramsey.

2nd Year	Pupils	=	159		
	TPs	=	294		
2nd Year provision		=	$\frac{294}{4.44}$	=	<u>66.8 cu</u>
3rd Year	Pupils	=	171		
	TPs	=	339		
3rd Year provision		=	$\frac{339}{4.44}$	=	<u>77.05 cu</u>
4th Year	Pupils	=	191		
	TPs	=	340		
4th Year provision		=	$\frac{340}{4.44}$	=	<u>77.3 cu</u>
5th Year	Pupils	=	180		
	TPs	=	323		
5th Year provision		=	$\frac{323}{4.44}$	=	<u>73.4 cu</u>

Stage III: To work out "Basic Provision"

By dividing number of pupils per group by 3.

Year 1	$\frac{159}{3}$ pupils	=	<u>53 cu</u>
Year 2	$\frac{159}{3}$ pupils	=	<u>53 cu</u>
Year 3	$\frac{171}{3}$ pupils	=	<u>57 cu</u>
Year 4	$\frac{191}{3}$ pupils	=	<u>64 cu</u>
Year 5	$\frac{180}{3}$ pupils	=	<u>60 cu</u>

Stage IV: Work out "Bonus"

Bonus is defined as: (Actual provision - Basic provision) c.units.

Therefore:-

$$\text{1st Year Bonus} = (64.09 - 53) = \underline{9.09 \text{ cu}}$$

$$\text{2nd Year Bonus} = (66.8 - 53) = \underline{13.8 \text{ cu}}$$

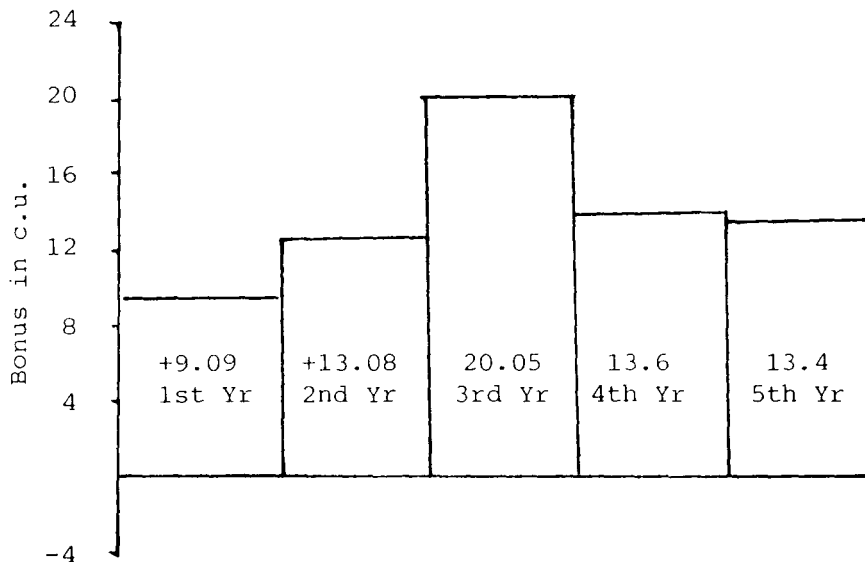
$$\text{3rd Year Bonus} = (77.05 - 57) = \underline{20.05 \text{ cu}}$$

$$\text{4th Year Bonus} = (77.3 - 63.7) = \underline{13.6 \text{ cu}}$$

$$\text{5th Year Bonus} = (73.4 - 60) = \underline{13.4 \text{ cu}}$$

Table 2a

To show "Bonus" distribution



Scale: 1 cm represents 4 cu bonus on y axis

2 cm represents 1 year group on x axis

This shows that in fact all class sizes must have been considerably lower than 27 per group - the number at which there is zero bonus.

Using Davies' notation for the curriculum equation $X = 9 CT$, then:

$$358.6 = 9 \times C \times 55$$

$$C = \frac{358.6}{9 \times 55}$$

$$C = \underline{0.72}$$

So contact ratio was 0.72.

Bonus in cu = actual provision - basic provision

$$= (358.6 - 287) \text{ cu}$$

$$= \underline{71.6 \text{ cu}}$$

Hence the Relative Bonus for the school b% may be calculated:

$$b\% = \frac{\text{total bonus in cu}}{\text{total basic provision cu}}$$

$$= \frac{71.6 \times 100}{287}$$

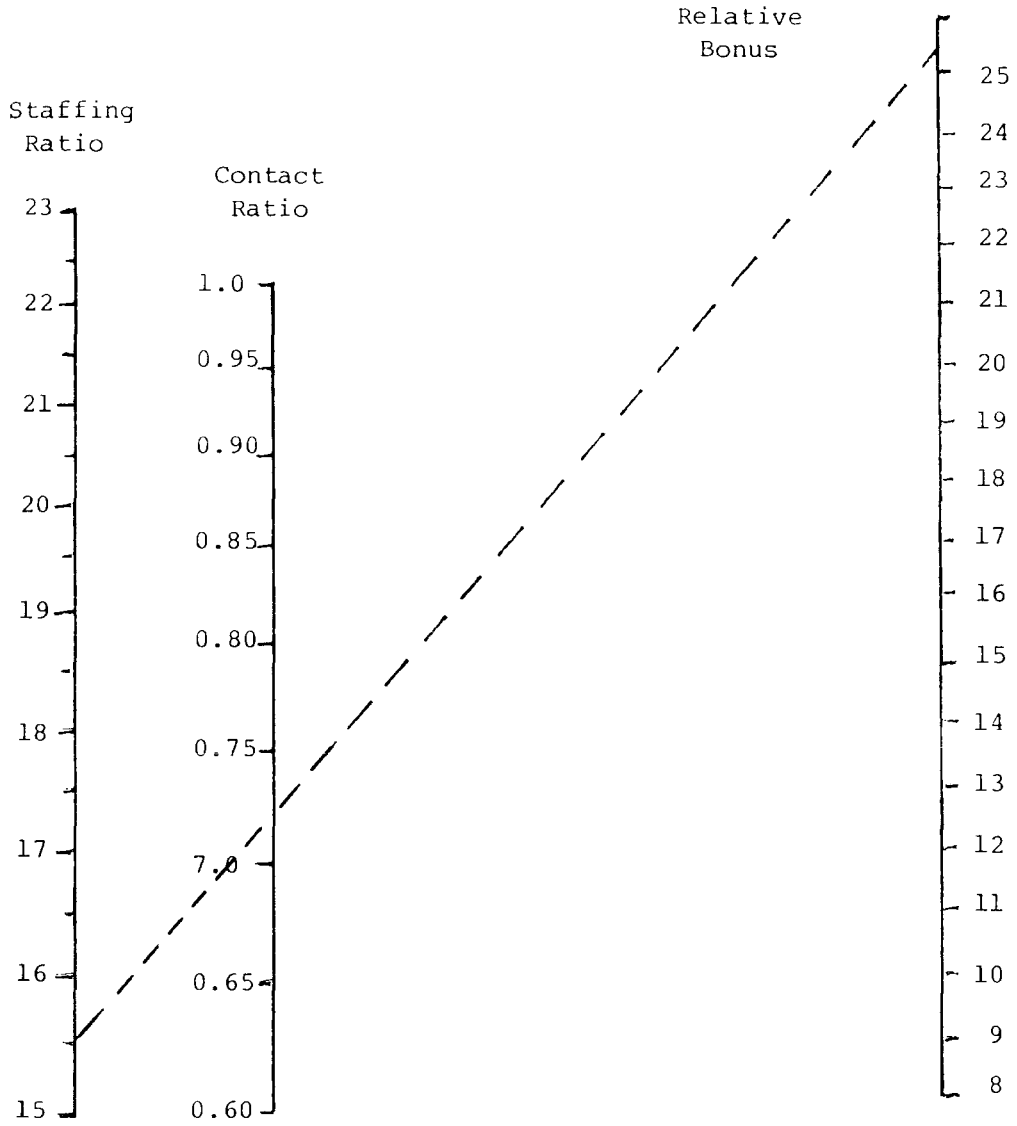
$$\underline{b\% = 25}$$

This is greater than the range of relative bonus acceptable to HMI of 10 to 20%. This can clearly be seen on the nomogram (see Table 3a).

Being termed a large school and hence not apparently suffering from the "small school effect", the pupil/teacher ratio was extremely low for the County, 1:18 being the then accepted norm. If in fact the school had been staffed as such and still maintaining the relatively low contact ratio of 0.72 against the more usual 0.8, then the staff should have been 47.7, i.e. $\frac{860}{18} = 47.7$.

Table 3a

The nomogram



A line joining staffing ratio with contact ratio, if projected, will show relative bonus.

It would appear then that the school was grossly over-staffed and that the number of staff above the normal quota, if direct 1:18 staff ratio were to be implemented, would have been at least seven. This was in fact a worse situation than the Brookside staffing, where staffing by curriculum was used. Here was another economic reason for amalgamation if the surplus staff could be redeployed then savings would occur.

Brackenhoe:

Table 1b

To show pupil numbers and distribution
in year groups for Year 1982-3

<i>Age in years</i>	<i>11</i>	<i>12</i>	<i>13</i>	<i>14</i>	<i>15</i>	<i>Total</i>
Boys	90	103	101	111	122	527
Girls	93	112	111	143	157	616
<i>Total</i>	183	215	212	254	279	1143

Staffing Total = 71.3

Therefore Pupil/Teacher ratio = $\frac{1143}{71.3} = 16.03$

By referring to Tables 3³ and 3a⁴ we can now analyse the curriculum using T. Davies' method as before.

$$\begin{aligned}
 \text{5th Year Pupils} &= . \\
 \text{TPs} &= 292.5 \\
 \text{5th Year provision} &= \frac{292.5}{2.77} = \underline{105.6 \text{ cu}}
 \end{aligned}$$

Stage III: To work out "Basic Provision"

By dividing number of pupils per group by 3.

$$\begin{aligned}
 \text{Year 1} & \quad \frac{183}{3} \text{ pupils} & = & \underline{61 \text{ cu}} \\
 \text{Year 2} & \quad \frac{215}{3} \text{ pupils} & = & \underline{71.6 \text{ cu}} \\
 \text{Year 3} & \quad \frac{212}{3} \text{ pupils} & = & \underline{70.6 \text{ cu}} \\
 \text{Year 4} & \quad \frac{254}{3} \text{ pupils} & = & \underline{84.66 \text{ cu}} \\
 \text{Year 5} & \quad \frac{279}{3} \text{ pupils} & = & \underline{93 \text{ cu}}
 \end{aligned}$$

Stage IV: Work out "Bonus"

Bonus is defined as: (Actual provision - basic provision) c.units.

Therefore:-

$$\begin{aligned}
 \text{1st Year Bonus} & = (72.2 - 61) & = & \underline{11.2 \text{ cu}} \\
 \text{2nd Year Bonus} & = (81.2 - 71.6) & = & \underline{9.6 \text{ cu}} \\
 \text{3rd Year Bonus} & = (89.3 - 70.6) & = & \underline{18.7 \text{ cu}} \\
 \text{4th Year Bonus} & = (108.5 - 84.66) & = & \underline{23.84 \text{ cu}} \\
 \text{5th Year Bonus} & = (105.6 - 93) & = & \underline{12.6 \text{ cu}}
 \end{aligned}$$

This shows that all classes run with numbers much less than 27 and in 4th Year the bonus is so high that this reflects tiny groups in option blocks.

Using Davies' notation for the curriculum equation $X = 9 CT$, then:

$$456.8 = 9 \times C \times 71.3$$

$$C = \frac{456.8}{9 \times 71.3}$$

$$C = \underline{.71}$$

The contact ratio is fairly low and a cause for concern, for although it was accepted that in the initial stage of amalgamation staffing would probably be generous because of the over-staffing problems of the two schools, we are now into the third year of amalgamation.

Bonus in cu - actual provision - basic provision

$$= 456.8 - 380.86$$

$$= \underline{75.94 \text{ cu}}$$

Hence the Relative Bonus for the school b% may be calculated:

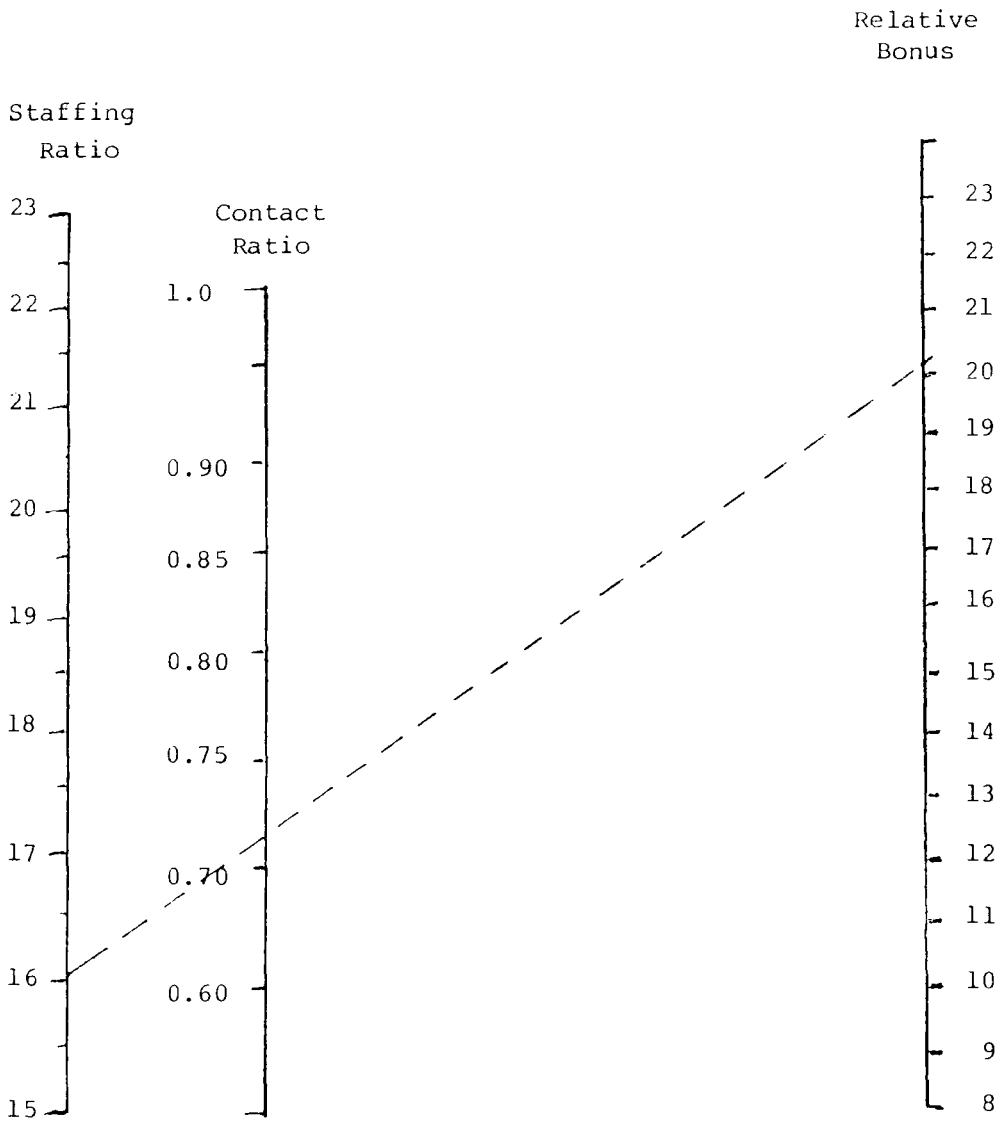
$$b\% = \frac{\text{total bonus in cu}}{\text{total basic cu}} \times 100$$

$$= \frac{75.94}{380.85} \times 100$$

$$b\% = \underline{19.9}$$

This is just inside the accepted range of bonus from HMI, that being 10 to 20%. This can be seen in Table 3b overleaf.

Table 3b



From this analysis the following observations can be made:

1. The staffing ratios of the two parent schools were similar, i.e. Brookside 1:16.4; Bertram Ramsey 1:15.6 and Brackenhoe 1:16.03. All are lower than the LEA norm of 1:18.
2. The argument of the "small school effect" in Brookside did not apply since the PTR of Brookside was closer to the LEA norm than in the larger school.
3. The staffing of Bertram Ramsey was costly: staff could have been lost and the curriculum maintained within the LEA accepted PTR and HMIs' recommended curriculum bonus costing.
4. The deployment of staff as shown by the curriculum bonus distribution of each parent school shows a very different pattern with a very unusual peak in 3rd Year in Bertram Ramsey. However, it is difficult to comment since this pattern may have changed had the PTR of Bertram Ramsey been closer to the accepted norm. It is interesting to note that the distribution of Brackenhoe now peaks in 4th Year which is more usual.
5. The curriculum for the new school has remained very much the same as that for each of the two parent schools. There are some areas where there has been a shift of emphasis, e.g. in the PE department where the number of periods allocated is lower but this has allowed a greater number of periods in the practical areas.
6. Some innovation has been available for all pupils, i.e. TVEI. If we had remained as two schools then it is likely that only one would have benefitted from the MSC initiative in the TVEI courses.
7. Spanish has taken over as the second foreign language as it was in Bertram Ramsey and German, which was taught in Brookside, has been phased out. This is due to personnel since we have a full-time teacher of Spanish and the German was taught by a part-time teacher.

8. Since the allocation of bonus is so high in the 4th Year, very small option groups are possible and this allows for enrichment in that minority subjects, e.g. music and geology, can be taught to the very few pupils interested.

However, these curriculum changes are minimal and we can safely accept that although very little enrichment has occurred as a direct result of the school's policy, and here I exclude the MSC input since it is outside of the school's control, at least we have not had any contraction of subjects. In this area, then, the assurance from the LEA holds true. The only criticism I would make is that the provision for early entry to external examinations in subjects such as Mathematics and English, which was available in Brookside, has been removed and we have no early entries.

If we now look at the cost effectiveness of the exercise, the situation is not as clear as the curriculum analysis. By referring to Appendix 4 (Table 4), showing the County Council typical expenditure for 1983-4, it is obvious that the Education Bill takes a large proportion of that expenditure; in fact for that year 68% - this varies only slightly from year to year as seen in the Statistics for Education¹ produced by Cleveland County. By looking more closely at the Education Committee Budget then obviously it is the teaching staffs' salaries which take up about 63% of the revenue. It would be logical, therefore, to expect that in an amalgamation the largest savings would be in reduction of teacher numbers. However, if this is examined the argument does not hold: the present PTR is more favourable than in either of the parent schools, the contact ratio is still well below the average for the county: this is shown in the preceding analysis. If the savings,

therefore, are not to be made in terms of staffing reduction then they must be made in some other way. The three buildings have remained in use for the past two years but now only two are in use. This means that savings in fuel, upkeep, etc. will be about one-third of the previous total. This looks encouraging on the surface, but there have been numerous alterations carried out to enable the contraction to occur, e.g. new laboratories have been created; new workshop facilities for the CDT areas and new Art suites, etc.: a substantial bill of £194,924² - this for buildings alone, and does not include furniture and refurbishings. But the message is clear: the savings in heating, lighting and upkeep of the building being taken out of use will quickly be absorbed by the bill for the refurbishment of the two kept in use. It is pertinent to note that the new laboratories, workshops, etc. were not planned prior to amalgamation and would not have been created if one building had not been withdrawn from use. However, since this is capital expenditure and hence does not affect the costs of education as such, the savings from the upkeep of one less building are real, albeit long-term. The table overleaf shows the distribution of the costs of running a 1,200 pupil secondary school.

The average cost is £1 million per annum, or approximately £1,000 per pupil, as shown in the Education Statistics for Cleveland County.³ Repairs and maintenance of the school are included in the total cost but capital expenditure is not included. To the casual observer who is not aware of these facts, it would appear that it could have been less costly to maintain the two separate schools and eliminate the need for new building and equipment. It would be worthwhile if these facts

<i>Payments made</i>	<i>% of total</i>
Teaching salaries	68.0
Non-teaching salaries	11.7
Transport of food, books, etc. to site	5.5
Capitation	2.4
Playing field maintenance	1.6
Rates	3.6
Insurance	0.2
Heating, Electricity, Telephones	3.7
Repairs and maintenance	3.3

could be made public by the Local Government for all to understand since that would avoid much of the criticism both by parents and teachers. Local Government assumes that the ratepayers understand the local budget and this is not necessarily true.

So the argument put forward by the LEA that there would be savings by amalgamating the two schools is also upheld. These savings should increase with the fall in staffing as rolls decline even further since with careful planning and redeployment this school should achieve more closely the LEA PTR norm as it is still over-staffed in some areas of the curriculum.

References

- 1 See Appendix 4.
- 2 See Appendix 4.
- 3 Education Statistics 1986: Cleveland County.
- 4 See Appendix 4.
- 5 Education Statistics 1986: Cleveland County.
- 6 *ibid.*, p.31, Table 20.
- 7 *ibid.*, p.1, Table 1; p.32, Table 21.

CHAPTER 5

STRESS AND TEACHERS

During the 1980s the word 'stress' has become a common one in the popular press as well as educational journals. The depth and detail of discussions about stress vary with the audience at which the publication is aimed. Nevertheless the articles are ever present and cannot be ignored. Many authors use the word freely as in 'Growing Classroom Stress'¹ (Garner, 1965), 'The Stress Taboo'² (Budge, 1980) and 'Stress in Teaching'³ (Dunham, 1984). Stress is accepted as an occupational disease amongst teachers according to a report from the International Labour Office, which reports on research from Europe and the US. Why then should teachers in the 1980s feel this burden of stress? Before this can possibly be answered there must be an agreed definition of the word and an acceptable means of measuring it. The definition of stress is one which varies with the perception of the individual. In 1979 Pratt⁴ carried out a survey of the meaning of stress by simply asking teachers what the word meant to them. He ended up with a long list as diverse as fear, frustration, unhappiness, anxiety and inability to cope. In 1985 Farrell⁵ suggested that the term is applicable when the individual's integrity or well-being is endangered. He took integrity to include values, hopes, aspirations, standards and self-image. It is clear from these two pieces of work that stress is a personal judgement of the individual's feelings, one person may find a given situation stressful while another is comfortable in the same situation. Teachers do not like to admit their shortcomings and would probably shy away from admitting feelings of stress in fear of its being judged as a sign of incompetence. The measurement of stress must therefore also be subjective and one can only look at trends and tendencies, not numeric measurements.

If the theory proposed by Maslow⁶ in his 'Hierarchy of Needs' is applied to teachers then the individual's recognition of stress and ability to cope with it is of enormous importance. It is part of the self-esteem and self-realisation goal to which we aspire. In the search for understanding the nature of stress in teaching Dunham⁷ has identified three major approaches: (1) pressures which cause stress (called stressors); (2) teachers' reactions to stressors and (3) methods of coping with stress. He also suggests a parallel between Hooke's Law of physics and the stress levels on teachers. As pressure increases the ability to adapt increases also until a point of no return is reached - the yield point - when even if the load of stress is removed there is either physiological or psychological damage to the individual. In this model he is suggesting that stress is a collection of causes and as such is independent of the personality of the individual. A number of stressors have been identified by Kyriacou and Sutcliffe⁸ (1977); they have been grouped into four broad areas:

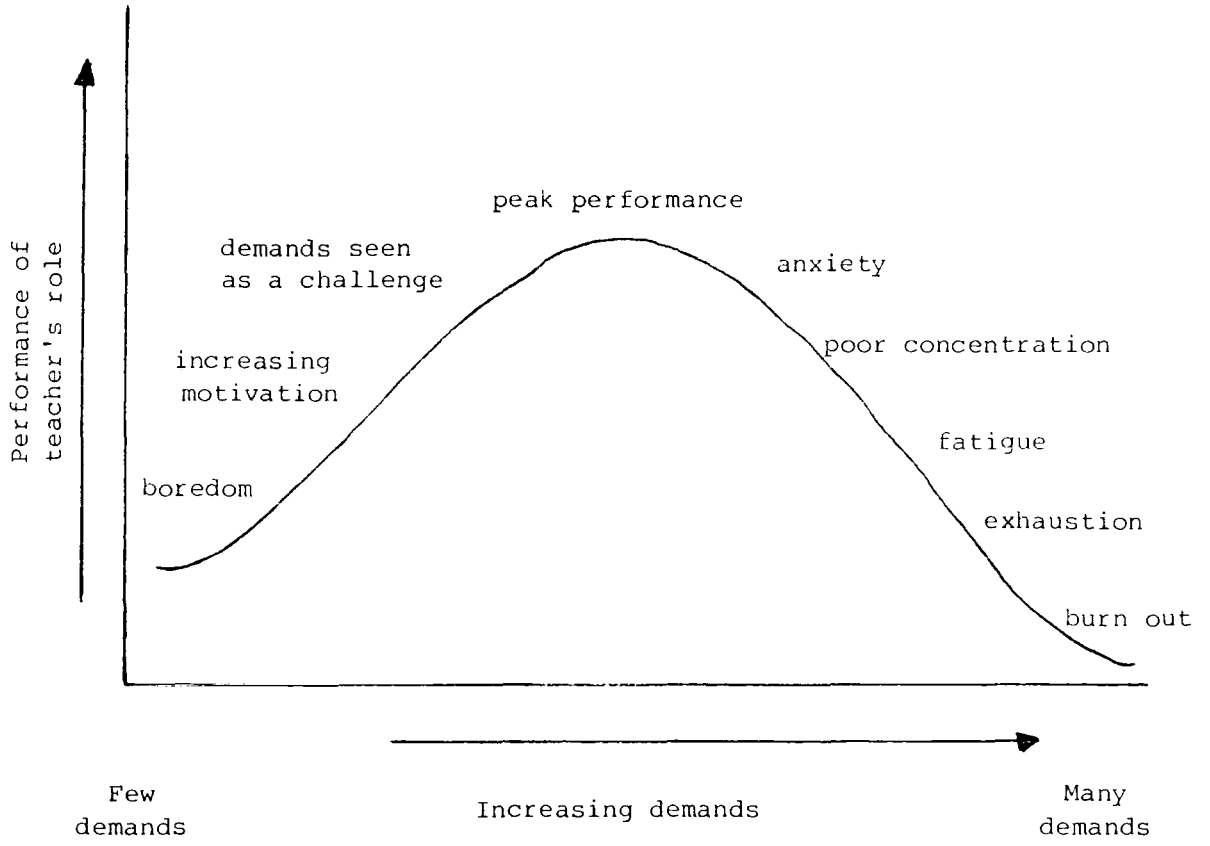
1. Pupil misbehaviour including noisy, rude behaviour needing further disciplinary action outside of the classroom.
2. Poor working conditions covering a wide range from physical conditions, poor resources and overcrowded classrooms to poor career structures.
3. Time pressures - too little time to do all that is expected of them.
4. Poor school ethos arising from problems of conflicting ideas of standards within the school and lack of agreement between staff and management.

These areas can be readily compared with Herzburg's⁹ hygiene and motivator factors. The hygiene factors being (a) policy, pay, working conditions and environment, while the motivators include (b) job content, recognition, responsibility and achievement. His theory is that if (a) is satisfied then (b) becomes important. If (a) is not satisfied then (b) may still be important but the individual is unhappy and (b) suffers. In short, the level of non-satisfaction of (a) has direct proportional bearing on (b). In the teacher's case if (a) is not satisfied then the individual will be suffering from such a degree of stress that it is highly unlikely that (b) will ever be satisfied despite the level of importance of (b) to that individual.

If the concept of stresses is accepted then the next stage in the stress cycle is to look at teachers' reactions to stress. These reactions can be grouped into four main categories: (a) behavioural; (b) mental; (c) emotional and (d) physical. Dunham¹⁰ suggests that teachers pass through successive stages as the perceived pressures increase. If the behavioural changes do not bring relief then the mental and emotional stages are manifest in anger, anxiety, poor concentration and frustration. At their most severe these stages can result in psychosomatic illnesses which lead to the final stage when fatigue and nervous exhaustion become real. Table 1 shows the relationship as Dunham sees it, between performance and the increasing demands made of the individual (see overleaf).

In 1983 Dunham carried out a survey on stress with the staff of three comprehensive schools in England. Teachers were asked to indicate on a check list which reactions they had experienced during the last academic year and their frequency. (This survey was also used

Table 1



with the staff of Brackenhoe School, except for the 'Any Other' category). Table 2 overleaf shows the original survey results.

Even with these facts it must be emphasised that stress is a personal judgement on how events are perceived and the response to these events. Alix Kirsta¹¹ states:

"Stress is more likely to occur if you find yourself caught against your will in a certain way of life or if you cannot shape or amend your lifestyle to suit your needs."

Teachers have been given much publicity with regard to their stressful lifestyle. In a recent survey¹² carried out by Dr. Jennifer Lisle, an occupational physician specialising in stress management, teachers are an easily identifiable, highly stressed group.

All individuals at some time experience stress and have different methods of coping with it. There is an abundance of literature on the management of stress but since a lack of time appears to be one of the higher stressors, it is unlikely that those feeling the strain will take the time to read about it. The important factor would seem to be the recognition of what causes us stress before we try to cope with it. Simply the recognition of what the cause is can begin to relieve the strain. It is satisfying to note that according to Lisle's survey¹³, teachers make a far greater effort (double in fact) to regulate their stress levels than any other group. The methods of coping with stress have been identified by Gardell¹⁴ as personal, interpersonal, organisation and community resources. The personal resources used by teachers include switching off, coming to terms with a stressful situation, acceptance of problems, keeping home and school as apart as possible and by taking courses to improve self-confidence/competence. Inter-

Table 2

TABLE : Percentage of staff in three English Comprehensive Schools identifying stress reactions.

Please tick any of the following reactions to occupational stress which you experienced this school year. Could you also indicate which of them (if any) you experienced very often (V.O.), Often (O.), Sometimes (S.) and Rarely (R.).

	SCHOOLS		
	A	B	C
1. Large increase in consumption of alcohol	0	10	3
2. Marital or family conflict	3	5	14
3. The marked reduction of contacts with people outside school	36	22	35
4. Displaced aggression – displacement on to children or colleagues or people outside school	20	18	14
5. Apathy	25	18	14
6. Wanting to leave teaching	25	15	20
7. Unwilling to support colleagues	0	0	3
8. Strong feelings of being unable to cope	7	16	8
9. Irritability	18	34	24
10. Moodiness	7	19	22
11. The inability to make decisions	0	4	6
12. Feverish activity with little purpose	7	18	10
13. Inability to concentrate	14	8	10
14. Absenteeism	0	0	3
15. Depression	3	11	8
16. Tension headaches	14	15	18
17. Feelings of exhaustion	36	46	41
18. Frustration because there was little sense of achievement	32	30	16
19. Withdrawal from staff contact	14	7	14
20. Anger	7	11	12
21. Anxiety	3	23	16
22. Loss of sleep	14	15	14
23. Loss of weight	0	5	0
24. Feelings of isolation in school	10	8	11
25. Feelings of fear	0	8	3
26. Feelings of guilt	7	10	9
27. Over-eating	14	15	14
28. Skin rash	3	5	0
29. Large increase in smoking	0	4	9
30. Hyper-sensitivity to criticism	7	11	18
31. Back pain	7	8	7
32. Any other			

personal methods include discussing the problems with other people either within the school situation, for example in the department, or with people unconnected with teaching. By talking out the problem the tension is released and while the problem remains the individual sees it as being more manageable. Organisation resources include departmental, pastoral and management teams to give support to staff. In-service courses and staff development courses should also be included here. These give teachers the opportunity to share experiences with others and generally let off steam. Community resources used by teachers are those which give them the chance to pursue a sport or recreation within the community which is very different from work. Two ways of coping with stress - exercise and relaxation - are dealt with by Leitner, Lester and Posner¹⁵, their theory being that stress causes the body to be kept in a state of readiness and that by exercise the day's tensions can be released. By increasing the general condition of the body by exercise, the feeling of well-being also improves the ability to cope.

Having accepted that teachers justifiably or not feel that they are subjected to high stress levels, it is important in this context to look at how these levels are affected by the amalgamation of schools. On the Social Readjustment Ratings Scale devised by Holmes and Rahe a change of job or job responsibilities, loss of job and trouble with employers and colleagues all rate a mention. All of these states are experienced to some degree by all teachers involved in an amalgamation of schools and therefore it would suggest that the stress levels of those teachers must increase accordingly. Dr. John Isaac of Oxford Polytechnic produced two papers based on his PhD thesis¹⁶ which are

directly applicable to this situation: 'Amalgamation and Teachers' and 'Amalgamation of Schools - Effects on Quality of Work'. In these papers he is concerned with the two most important issues involved in amalgamating schools, i.e. the effect on the lives of the people involved and the standard of work produced by those people in the resulting school. The logistics and economics are not featured in the papers but the feelings and attitudes of teachers are discussed and some of the factors about which teachers feel strongly. The effect of falling rolls in schools has been discussed fully within this document as well as the results from amalgamating schools in curricular terms. Here the effects on people are to be examined and the changes which have occurred because of the amalgamation.

From his survey of six schools, Isaac put forward four factors which, from both his observations and feed-back from the staff involved, were key issues. They were:

1. self-esteem
2. anxiety
3. role
4. territory

It is important for the administrators who manage amalgamations to keep these factors in mind since it is a period of high stress for all staff concerned. Unfortunately education administrators are overworked and have little time to become actively involved with the personalities rather than the titles or even numbers of staff. The senior management teams of amalgamating schools must here play an important part in the support of staff. If each of the key factors is considered there is a wealth of literature to support the importance of each. This literature

has been produced over the last fifty years dating from Mead in 1934 through to current publications. One would have thought that with all this evidence mistakes could be avoided and the number of cases of teachers suffering mental ill-health minimised. Self-esteem, as has been mentioned previously, is important to us all but in amalgamating schools there are many situations where this appears to be lost, for example:

1. a direct loss of status within the new school;
2. a loss of esteem when one member of a group is promoted and another is not;
3. loss of mastery of a situation, usually when skills are not required but new ones are demanded;
4. loss of contact with others due to geographic location;
5. a loss of feeling of self-importance; that one's views matter.

Some of these areas can be overcome by sensitive management by senior management within the new school but care must be taken to avoid creation of 'non-jobs'. These are often so artificial that they are readily detected as such even by the children. The major difficulty here is loss of motivation by staff who experience loss of self-esteem. It is so easy to lower aspiration levels and hence lessen the feeling of failure as part of the defence mechanism operating within oneself. If this is not detected early enough or if it is not acted upon then staff will retreat to a 'safe' position, refusing to take on new tasks, leaving those who are willing or have the greater flexibility to absorb all the changes.

Loss of self-esteem is related to the second key factor, i.e. anxiety. This is a subjective state since it varies from one to another. The behaviour of one teacher can affect others and while the performance of the teacher may not suffer, the cost to the self may be high. If the coping skills as previously discussed do not readily overcome the problem then a whole range of symptoms may be experienced, for example, sweating fits, headaches, palpitations, etc. Anxiety is an emotional state which is often brought on by the feeling that the organisation is chaotic, not directly controllable or not progressing in the desired way. It can be summed up in five categories:

1. anxiety in relation to self-esteem;
2. anxiety about the change of responsibility;
3. the implications on career;
4. anxiety because of the increased attention from 'superiors';
5. general anxiety due to changing environment.

If teachers are in an anxious state then they will not be able to learn new tasks and the feeling of anxiety will increase. Management can improve the general tone of the new school by issuing policy on the everyday matters such as assembly rotas, lunchtime arrangements, punishment of pupils, etc. These may appear to be mundane issues but they increase in importance to the anxious teacher out of proportion to their actual importance. Research shows that it is necessary for teachers to know these basic policies, especially pupil control, and when they are known teachers will cope more readily (Willower, 1969).¹⁷ There is a tendency in unsettled situations for the individual to become immersed in routine tasks. To avoid this state positive directions

need to be issued to all staff as quickly as possible so that meaningful work can be carried out. This is easier in theory than in practice since pre-amalgamation and even during the appointments schedule the roles of the individuals are not clear. Staff and indeed the officers seem to believe that when appointments are made the role of that person is made clear; this is not the case. When job titles are identical the tasks may be the same but the role differs from one school to another. Teachers often find difficulty in leaving their old role behind and acquiring a new one. In simulation exercises this is always a problem, even though it is only role-play. Various influences affect the degree of comfort felt in new roles: group pressures and personalities can greatly inhibit the acquisition of a new formal role especially when the informal one does not change. In pre-merger stages group pressures often distort the way the process is viewed and can lead to hostility between groups, one group viewing the merger as an amalgamation and the other viewing it as a take-over (Isaac, 1980).¹⁸ A difficulty for management often occurs at this stage in the emergence of robber-barons, who take advantage of the unsettled times to enlarge their own empires or areas of influence. Some teachers have a preconceived idea of their own roles within the new establishment and find it difficult to adjust if their expectations are not fulfilled. These people are those who aspire to certain roles and have to be 'cooled-out', for example a head of department who has aspirations to become Senior Teacher, as described by Goffman (1952).¹⁹

The last factor which appears to be of major importance is that of territory. The question "Where will I be teaching?" is one which is constantly asked. For some teachers the area in which they will

teach is well-defined and therefore is not a cause for concern, for example science and craft subjects. Other teachers are more vulnerable in terms of physical territory. John Isaac suggests four aspects of territory:

1. Physical territory
2. Social distance
3. Quality of space
4. Psychological territory

In an amalgamation the school units which are to be merged are known well by only part of the staff, i.e. their home base. If staff remain in the room which they have previously occupied they appear to have an advantage over those who have to move. Managerially it is advantageous for everyone to move and hence negate this effect. It is amusing to observe the different perceptions of the same physical space; staff changing rooms always seem to feel that they have the worst of the deal! For many staff it would appear from research carried out that it is desirable to be near colleagues. This would seem to be unnecessary since teachers have little or no contact with their neighbours between breaks. However it is deemed important and causes stress when friendship groups are separated. Another concern is the proximity to another of greater perceived importance or to the telephone! This area borders on psychological territory and differs from one individual to another. The quality of space is always a topic for argument: a well designed and equipped laboratory with preparatory space is envied by those teaching in a multi-purpose general teaching room. Carpeting appears to be synonymous with success.

Probably the factor of most managerial importance is the last one, i.e. psychological territory, since this covers the allocation of areas of responsibility especially of new courses within the new schools. Curriculum power is one of the greatest motivators within a school; the evidence for this can be seen at any Heads of Departments meeting. If this power is removed or reduced then the teacher concerned will feel anxious or even worse, will lower his aspiration level and become demotivated. This is the type of situation to be avoided in an amalgamation since it can affect the total effectiveness of the school. It is critical that management teams are aware of these factors and as far as is possible the problems arising from them are managed effectively. This attention would prevent more problems from arising in the future. Having discussed the relationship between stress and the teacher in general terms, the particular case of the amalgamated school, Brackenhoe, can be considered against this background.

After the initial shock of amalgamation being agreed by the Secretary of State, the process of merging two schools began. This has been discussed from the management viewpoint earlier but now it is to be viewed against Isaac's work in other schools. The four key factors which Isaac puts forward from this work are used as a format for investigating Brackenhoe but not in the order in which he presents them. The order in which they are to be presented for this particular case is as follows:

1. anxiety
2. role
3. territory
4. self-esteem

This order does not suggest any hierarchy of importance, simply a logical presentation of facts.

1. Anxiety

During the period before acceptance of the amalgamation proposal by the Department of Education, the staffs of each school were aware of their own worries about the merger. At this stage some staff were already feeling the strain since they had already undergone several reorganisations and mergers in the past. Other staff who had not experienced this did not appear to be affected at this stage. When the agreement was announced, staff reactions varied widely but the underlying common factor was one of concern. The degree of concern grew as time passed and no information was forthcoming. When the new Head designate was appointed the staff of the smaller school looked at the merger as a take-over since he was the Head of the larger school. Staff of the smaller school, the one in which I was working, then began to be anxious about their own jobs and the likelihood of being appointed or not. They queried their own career pathways. Some staff looked at the merger as a widening of experience and enhancing promotion prospects; others were not so optimistic. Areas of responsibility were guarded carefully and new tasks were undertaken by some who perhaps felt at risk. At this stage anxiety appeared as nervousness or even excitement, except in one case within this school where sleeplessness, shaking hands and 'switch-off' symptoms were reported. Other people may have been experiencing some anxiety symptoms but they did not discuss them at this time.

2. Role

The appointment of staff followed the routine set out in Chapter 3. There is no doubt that the Head designate genuinely expected newly appointed middle management to enter into negotiations with their underlings. This happened in very few cases. The assumption was made that the appointments necessarily defined the role and that staff would give respect to that role. The following table shows the appointments made in the new school and the posts held in the previous school with the scale post carried (see Table 3). The table shows that many staff were demoted and had to take on a new role with less importance attached to it. The personalities of some staff are such that this caused feelings of hostility or non-co-operation towards the appointee. Conversely the appointee often did not treat the deposed member of staff with the degree of sensitivity required in this situation. A major factor in the entire area of role and role expectation was that people did not know each other. Staff tended to group together with others from the same school, gaining comfort from shared experience with colleagues as part of their coping strategy (Dunham, 1984).²⁰ Some staff have had difficulty in adjusting their role behaviour to suit the new situation. The continual change within education also causes problems for some staff who do not have the flexibility to change. As the age of the staff increases this problem will be exacerbated. For everyone in an amalgamated situation, the role must change since the personnel, policies and working conditions change.

Table 3

To show changes in scale/status at amalgamation

B denotes Brookside School; BR denotes Bertram Ramsey School

Original School	Faculty/ Original post held	Original Scale	Promotion	Demotion	Equivalent	Post now held/Scale
<u>Communication</u>						
B	Head of Dept.	4			✓	Head of Faculty
BR	Head of Dept.	4		✓		i/c Scale 2
BR	Head of Dept.	4			✓	
B	Head of Dept.	4		✓		2
BR		2			✓	
B	i/c	3			✓	
BR	i/c	2		✓		Scale 2 but not i/c
B	i/c	3			✓	
BR		2			✓	
BR		2			✓	
BR		2		✓		1
<u>Counselling</u>						
BR	Senior Teacher	Senior Teacher			✓	Head of Faculty/ Senior Teacher
B	Ass. Head of Year	2	✓			Head of Year Scale 3
B	Head of Year	3			✓	
BR	Head of Year	3			✓	
BR	Head of Year	3			✓	
BR	Head of Year	3			✓	
BR	Head of Year	3			✓	1
BR	Head of Year	3			✓	2
B	Ass. Head of Year	2			✓	Scale 2 but now i/c
<u>Maths/Science</u>						
BR	Head of Dept.	4			✓	Head of Faculty
B	Head of Dept.	4		✓		Scale 3 i/c
BR	i/c	2			✓	
B	i/c	2	✓			Scale 3 i/c
BR	i/c	3		✓		Scale 3 but not i/c
Out		3	✓			Head of Dept. Scale 4
B		2			✓	
BR	i/c	2		✓		1
BR	i/c	2			✓	



Table 3 (cont.)

Original School	Faculty/ Original post held	Original Scale	Promotion	Demotion	Equivalent	Post now held/Scale
	<u>Human Studies</u>					
B	Head of Dept.	3		✓		2
BR	Head of Dept.	3			✓	
BR	Head of Dept.	3			✓	
B	Acting Dep. Head	Group 10		✓		Scale 4 Head of Fac.
BR	Head of Dept.	3			✓	
BR	i/c	3			✓	
BR		2			✓	
BR	i/c	3		✓		2 i/c
B	i/c	2				1
	<u>Creative</u>					
B	Head of Dept.	3		✓		2
B	Head of Dept.	3			✓	
BR	Head of Dept.	3			✓	
BR	Head of Dept.	3			✓	
BR	Head of Dept.	3		✓		1
BR	Head of Dept.	3		✓		1
B	Head of Dept.	3		✓		1
BR		2			✓	
BR	i/c	2		✓		1
BR		2			✓	
Out	Head of Dept.	3	✓			Scale 4 Head of Fac.
BR	Deputy Head	Group 11			✓	
B	Deputy Head	Group 10	✓			
Scale 1 posts are not shown						

3. Physical Territory

There are always amusing situations which arise in the midst of upheaval: one such one was the allocation of office space. The Head moved into a different building, i.e. the smaller school and took over the ex-Head's office. My office, which was next door, was given to a Head of Year. I was put into a converted cupboard in a different building, while the other Deputy stayed in his own office. Early planning enabled us to group subject teachers together for the facility of sharing resources and ease of access to departmental equipment. Initially the allocation of rooms was fairly satisfactory but then there were still three buildings in use. When the school had to vacate one building, i.e. for September 1986, the room allocation was not as satisfactory and more rooms had to become multi-purpose with considerable sharing. Since this came three years after the initial amalgamation it did not appear to cause as many problems as it might have done in the earlier stages. The only difficulty in room allocation was that only the smaller school had been very well looked after and was still well decorated at the time of amalgamation. The other two buildings were in a far worse state of decoration and were less desirable places to work, with the outcome that the Brookside building was the place to be. Ex-Brookside staff who were allocated rooms in the other buildings were decidedly discontented and felt that the distribution was unfair. The outcome of this was that the County found enough money to redecorate large areas of these buildings to make them more habitable. This removed some of the problems and overall this territorial aspect was solved fairly satisfactorily. The problem of psychological or curricular territory was not solved so

readily. New Heads of Department had varying ideas of the courses to be offered to the pupils. There was no directive or advice given from the Head and hence no overall policy. The result was chaos with sets of new textbooks being totally redundant and vast amounts of capitation being spent to replace them with others. In one department there were three sets of texts only one year old and they were all discarded. A new set was bought bringing the total of new texts in that department to around 300 in one year for one course. This was nearly the entire departmental capitation for the year. Expertise gained by staff running courses became irrelevant as new courses appeared. Staff having had responsibility for large areas of the syllabus of their subjects suddenly found themselves with a new syllabus and no responsibility.

4. Self-esteem

For all those staff who were not appointed to the post for which they applied and had held in their previous schools, the loss of self-esteem must have been overwhelming. Not only did they lose face in their own perception but they had to accept that pupils would also be aware of the loss of status or power. Children are very perceptive and will use situations to their own advantage if the need arises; many cases of disciplinary action needed for pupils arose because of this. Staff also had to accept that others were promoted or at least appointed to equivalent posts while they themselves were not. In some cases the people appointed were from outside of the two schools because of the relocation agreement and came already demotivated and bearing a grudge at having to be relocated. The loss of control over courses or parts of the syllabus meant again the loss of opportunity to make

meaningful contributions to the subject. New courses meant new skills or approaches and these were demanded when there was already a lack of self-confidence. The time was not opportune to ask staff to take on new tasks. All of these factors contributing to the loss of self-esteem also contributed to the very low morale within the new school and to the stress levels felt by the staff.

To try to measure the anxiety levels within the school, Dunham's test²¹ was used as a guide. It also gave a comparison with other schools. The test results are shown in Table 2a overleaf. About 74% of the questionnaire were returned from a total of 68 staff. From the results on the returned forms it is safe to deduce that the majority of staff were experiencing some symptoms of stress. To look at the problem more closely, the attendance rates of the staff were monitored. The results are shown in Table 4 (see p. 108). The figures used are for the academic year 1984-5 and the average attendance was about 87%. This figure includes the long-term absences as well as short-term. For comparison the rate is also shown for the academic year 1986-7 when the anxiety levels should be levelling out if the school is functioning as a viable unit. This is for the third year after amalgamation which should be sufficient time for pre-amalgamation stress to have dissipated and the general morale to have improved as staff begin to work in harmony. As can be seen from Table 5 (see p. 108), the rate of attendance has dropped even further to an average of about 81%. This figure does not include staff absent for GCSE training. It can be seen that attendance is highest just before a holiday and just after, but that it fluctuates quite markedly. Attendance in the Summer Term is much better than in the other two terms. This could be that

Table 2a

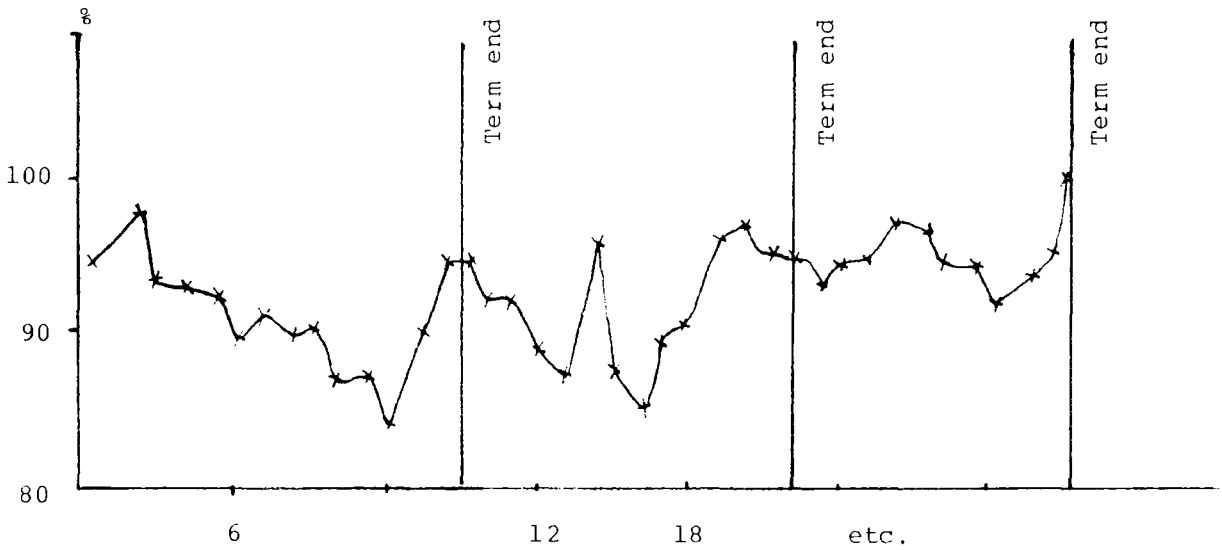
Percentage of staff in three English comprehensive schools identifying stress reactions

	<i>Schools</i>			
	<i>A</i>	<i>B</i>	<i>C</i>	<i>D</i>
Large increase in consumption of alcohol	0	10	3	2
Marital or family conflict	3	5	14	8
The marked reduction of contacts with people outside school	36	22	35	21
Displaced aggression - displacement on to children or colleagues or people outside school	20	18	14	14
Apathy	25	18	14	16
Wanting to leave teaching	25	15	20	15
Unwilling to support colleagues	0	0	3	0
Strong feelings of being unable to cope	7	16	8	7
Irritability	18	34	24	27
Moodiness	7	19	22	16
The inability to make decisions	0	4	6	8
Feverish activity with little purpose	7	18	10	18
Inability to concentrate	14	8	10	12
Absenteeism	0	0	3	16
Depression	3	11	8	14
Tension headaches	14	15	18	18
Feelings of exhaustion	36	46	41	36
Frustration because there was little sense of achievement	32	30	16	17
Withdrawal from staff contact	14	7	14	14
Anger	7	11	12	8
Anxiety	3	23	16	11
Loss of sleep	14	15	14	19
Loss of weight	0	5	0	6
Feelings of isolation in school	10	8	11	2
Feelings of fear	0	8	3	0
Feelings of guilt	7	10	9	0
Over-eating	14	15	14	13
Skin rash	3	5	0	4

	<i>A</i>	<i>B</i>	<i>C</i>	<i>D</i>
Large increase in smoking	0	4	9	12
Hyper-sensitivity to criticism	7	11	18	13
Back pain	7	8	7	6
Any other			-	

Table 4

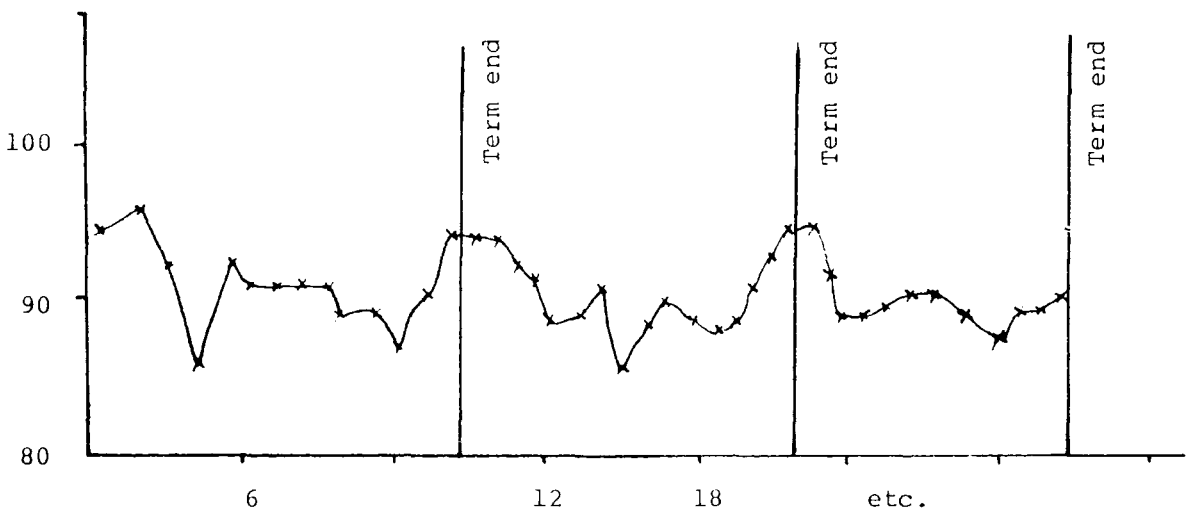
Graph to show attendance rate of staff for the year 1984-85



Scale: x axis 1 cm = 3 weeks
y axis 1 cm = 10%

Table 5

Graph to show attendance rate of staff for the year 1986-87



Scale: x axis 1 cm = 3 weeks
y axis 1 cm = 10%

the weather improves and infection rate declines or that the 5th Year pupils have left and hence work-loads diminish.

Since the amalgamation there has been evidence of serious problems with respect to staffs' coping ability with the levels of stress perceived. In the first year of the new school one male member of staff - 35 years old - had a nervous breakdown which resulted in his being awarded a breakdown pension. Effectively his career is over since he is now no longer allowed to teach. Two very senior members of staff, ex-Heads of Department, took early retirement. Three other teachers took retirement, one without any enhancement. In the next year another male teacher - 38 years old - had a nervous breakdown but because of his personal circumstances returned to school. He is now on a long-term absence with nervous debility. Three more staff retired early. In the third year there were four cases of absence with the cause being nervous debility but none actually had breakdowns. In the current year two very senior members of staff have had long-term absence due to nervous problems severe enough to query early retirement settlements. The reasons given for the short-term absences have included numbers of migraine attacks, unexplained rashes, vague back problems, chest pains and palpitations. In addition there have been the more usual colds, influenza and gastric upsets. The nature of the problems causes concern since so many of these are symptomatic of anxiety states. The picture emerges of an unhappy, highly stressed staff. Following Dunham's analogy of Hooke's Law of physics, some staff in this school have reached their 'yield point'. Initially coping resources were stretched and the demands made went beyond the level of peak performance but as the demands have both continued and

increased resources have reached overload. Demands are made on staff regularly, whether they are for new syllabi, as in GCSE, or for longer working hours, or even for pay settlements. These are all above the normal working day where the high absentee rate increases the demand on staff in attendance to cover colleagues' classes.

It is of value to note that the effect on morale is not confined to the staff: the pupils are also affected. Revan's study, 'Standards of Morale'²¹, showed that in hospitals the morale of the staff had direct effects on the efficiency of the establishment and on the convalescence rate of patients. Schools are not unlike hospitals in that they are institutions where teams of people work together for the benefit of their 'customers'. The effect on the children can be seen in numerical terms. Three areas of children's behaviour in schools can be taken to be indicative of the level of commitment: (1) attendance rates, (2) truancy rate and (3) behavioural problems. The attendance rate for the year 1984-5 was as follows: 1st Year - 88.1%; 2nd Year - 87.6%; 3rd Year - 84.3%; 4th Year - 79.5% and 5th Year - 77.4%.

Truancy figures are not readily available since much of the problem is in-school truancy. Children arrive for their register mark and then do not attend lessons. On a site where there are more than one building, this is easily managed as children can 'disappear' as they move between buildings. The Education Social Worker attached to the school is now keeping records of the truancy figures and a system of class registering was introduced this year in an attempt to reduce in-school truancy. The current climate of poor employment prospects could be blamed for apparent lack of commitment by the pupils. However, the courses offered are increasingly fitted to the more leisure-based activities and practical areas, which should appeal to most.

The cost of repairing buildings damaged by vandalism has risen significantly (figures for this were not available from the County Offices). Pupils show their discontent with increased anti-social behaviour, truancy and lethargy. Staff discontent is shown by poor attendance and lack of commitment. The two have to be viewed together since the school ethos and climate has to be a product of them both. At the time of amalgamation there was an ideal opportunity to bring staff together to create a good new school. This was missed and the outcome now shows the result of a lack of successful management in the early stages. In 1984 HMI issued a report in which it is said:

*"In nearly one-fifth of all schools visited, improved leadership by either Heads, Heads of Department or both was deemed necessary ..."*²²

Amalgamation was the time to ensure that the leadership was of the highest standard, appointments should have ensured this. Parents of some children are not satisfied with the situation and this has resulted in one of the Primary feeder schools being removed from the catchment area. This school is in the higher socio-economic area and the removal is due to parent/governor pressure. This has the effect of lowering the ability level of the top stream within the school since it is mainly from the better socio-economic areas which the high achievers come. In turn this affects morale of staff and the whole downward spiral of frustration and anxiety is reinforced. Isaac summarises the situation in these words:

*"The quality of work in an amalgamated school will reflect the degree of morale and motivation present in staff and students."*²³

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CHAPTER 6

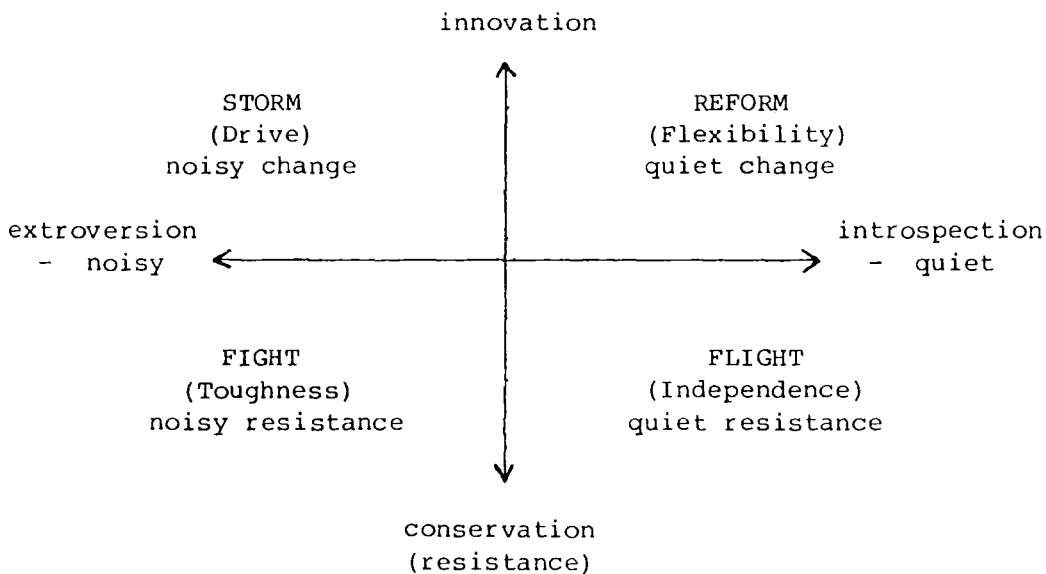
CHANGE

In the previous chapter anxiety levels and the general feeling of being stressed was discussed in some detail. The problems still remain of (a) what can now be done to alleviate the stress and (b) what could have been done to avoid some of the problems. The latter question is probably the more important since the answers could help to avoid problems in future amalgamations within the County. Clearly there is a need for change in approach, attitudes and managerial skills if contraction is to be made less stressful. Contraction of schools is a fact; school rolls have fallen dramatically and are still falling. The projected figures available only apply to the 1990s and there is no way of forecasting the birth-rate beyond this time. If the birth-rate continues to decline then there is always the possibility of another wave of amalgamations. Awareness of this possibility and the ability to manage it more successfully should be a high priority within any LEA.

Organisational theory stresses the concept of 'readiness'. If indeed schools were in a perpetual state of readiness for change then amalgamation would not be viewed as anything other than another change. Obviously schools on the whole are not in this Utopian state of being prepared for any challenge that appears. Perhaps one of the more positive results emerging from the amalgamation process is that more teachers and organisations may be better prepared for the next challenge. However, schools as institutions do not quite fit with organisational theory. Over the years they have managed to remain as fairly stable institutions, but this is changing. The changes are due to three factors: fall in school rolls, economic climate and the poor public image of schools. There are pointers that change is

occurring in the attempted restructuring of the profession and the more general acceptance of the need for shared goals within the schools themselves. Amalgamation is synonymous with change. Nothing within the system can possibly remain unchanged simply because the personnel change. Many aspects of the school could remain untouched in theory but the practical applications will change within the total organisation because of the variations in interpretation by the individuals.

There are various ways in which people respond to change. These can be shown as a quadrant (Heller)¹:



All people can be fitted into one of the groups within the quadrant: if they are pro-change they belong in the top half of the quadrant, anti-change or resistance oriented people belong in the lower half. The actual quarter is decided by the manner of the individual's approach. For a healthy organisation all four qualities need to be present. Within any amalgamation it is highly likely that all qualities will be present but yet again it is the management of these

which can create a worthwhile organisation. One criticism often made of management is that communication is not good enough and the 'open-climate' stressed in most organisational theory as a key to change is not achieved. Heller suggests a variation on this theory:

*"Open climate is a necessary but not sufficient condition for healthy organisational change."*²

The acceptance of change is dependent upon how it is viewed by the organisation. Bennis³ suggests that change will be resisted according to the degree of knowledge about the change, the level of trust in the source and the degree of influence in controlling the nature or direction of the change. For any change in schools or indeed any organisation to be effective, the implementation should take into consideration three factors proposed by Adair⁴:

1. the group-task;
2. the morale of the group;
3. the individuals within the group.

The definitions of the tasks involved should be clearly set out.

These should involve job-descriptions with the policy of the school as the background. The role played by staff should be congruent with school policy or conflicting behaviour occurs and this leads to chaos. Individual styles should not be dismissed but it must be made clear that whatever the style it must conform to overall policy. With contraction career aspirations usually suffer and hence morale declines. With good management every effort should be made to maximise the involvement of all staff in redefinition of job-descriptions, school policy, etc. Participative management here is of vital importance, if staff are involved with decision making they are more likely

to be contented with the outcome.⁵ Here individual differences of group members can be rationalised and each has the opportunity to give an opinion. This not only helps morale but by open discussion the stress is shared and kept to a manageable level. The management team must be able to balance these three factors bearing in mind that it is the group's perception of leadership which is important and not their own opinions of the leadership offered. Handy⁶ sums this up as follows:

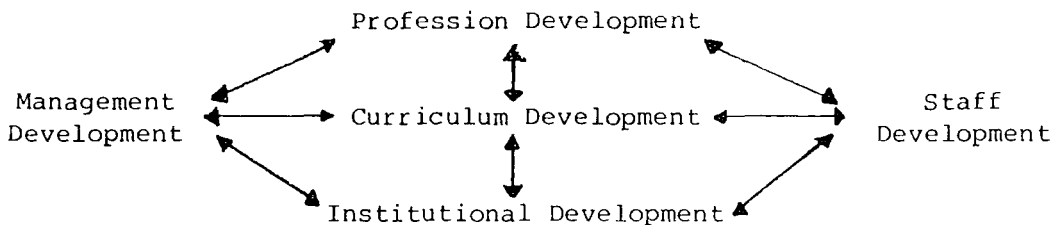
"... what the manager requires to satisfy the leadership function (more so with retrenchment than any other circumstance) is helicopter vision"

i.e. the ability to rise above events and take an overview through a wider perspective.

To implement change successfully the management should ensure that the following factors are satisfied:

1. The organisation should have as much understanding of the proposed change as possible. Information should be discussed openly so that the degree of trust in the initiator (LEA in this case) is as high as possible.
2. The effort made to implement the change should be seen as a group effort. By giving support to the change management can legitimise it.
3. The programme should take into account the emotional state of the individuals concerned while fulfilling the change needed.
4. Change agents could minimise resistance to change if they are accepted group members who can be seen to be working in support of the change while following the programme sensitively.

Change should be viewed as a developmental programme which is desirable and not as a threat. The following model of a development framework is suggested by ACSET⁷:



The advice of ACSET is that taking this overview of change and inter-relating all aspects will lead to 'more effective improvement in schools'. A great deal of work has been done to encourage schools to use GRIDS⁸ in their programmes in an attempt to stimulate development of both the individual and the curriculum.

Literature on change within organisations is divided into three categories; Isaac⁹ calls these:

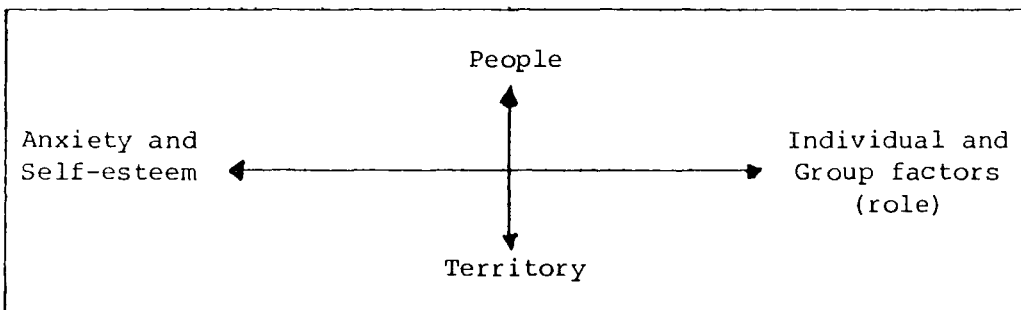
1. people-based studies
2. power-based
3. gradualist.

Chin and Benne¹⁰, while agreeing with this concept, give the categories different names. The titles are unimportant but the philosophies are important. They can be summed up as follows:

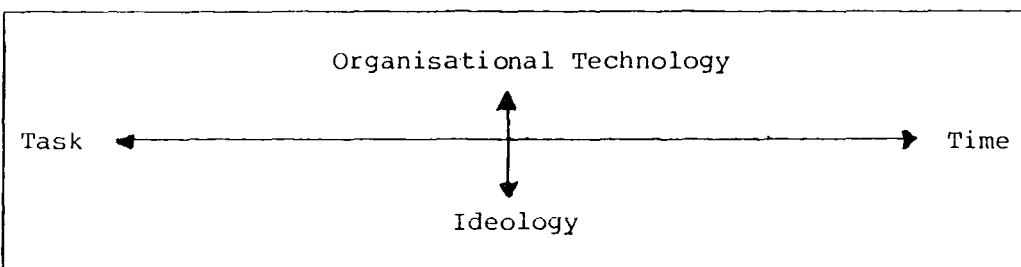
1. The way to change organisations is to change the way in which the people behave in them - this idea involves the use of change agents as discussed by Bennis.¹¹
2. The reason for change is bureaucratic.
3. The way to manage change in a gradual way.

It is this third group of studies which most nearly fits the way in which teachers actually work (Taylor).¹² While accepting that this is true in most circumstances, amalgamation is not a usual state and therefore the method of change is not in this case seen as gradualistic. It is more commonly thought of as bureaucratic and people based. Obviously the change in working conditions and/or environment is usually by authority decision. The change in the way people work within those imposed conditions depends upon the people. The four key factors discussed in the previous chapter as being those which contribute most towards stress are again seen in the following relationship between change for people and change for the organisation:

People



Organisation



If the resulting organisation is to be successful all of its members must work towards common, achievable goals. Short-term goals can be

used to bring a sense of unity and purpose into a new organisation, for example a fund-raising project with a specific target. The exact nature of the goals is not important; it is the concept behind them which matters.

The feature which is probably most important in any change situation is the management of oneself. Many staff are unaware of the importance of this and yet it is essential to cope with a new situation. With specific training it is possible to make one's own needs the centre of one's behaviour without ignoring the needs of others. Most of us will go to great lengths to avoid change and therefore we only change when we feel ready to do so. We are quite capable of creating many plausible excuses to avoid situations which are threatening, frightening or just disagreeable. It is possible to learn how to cope more readily with stressful situations which cannot be avoided. Physical fitness, mental relaxation, the ability to keep life in perspective and take time-out if needed, and the ability to live in the present are all skills which help us to cope more readily. Change does not need to be a stressful experience. It is the way in which change is approached by the individual which causes it to be viewed as threatening or exciting.

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CHAPTER 7

ALTERNATIVES TO AMALGAMATION IN COUNTY CLEVELAND

1. Consortia
2. Cluster

If the amalgamation of schools causes or at least exacerbates stress-related problems in both staff and children, could an alternative solution to the falling roll and surplus place problem have been found? It is a problem which demands lateral thinking rather than linear. If the problem of having a declining roll and hence surplus staff, while trying to maintain a balanced, varied curriculum for all, is examined in isolation from other constraints then the solution seems obvious. A method of sharing staff and resources by more than one small school lessens the small-school effect on both staffing numbers and curriculum viability in each school. Staff would still have to be shed but the traumatic experience of amalgamation could be avoided for the remaining staff and pupils. Specialist staff in a small school are usually only needed on a part-time basis and could spend the remainder of the time either in another school or teaching pupils from there. At the moment these specialists usually fill up their time by teaching subjects in other areas of the curriculum, sometimes where they have little or no expertise and interest. This would appear to make it difficult to improve educational standards, an aim to which Kenneth Baker refers in almost every statement he makes to the press. He also urges the closure of schools or the amalgamation of schools almost as regularly.

In Cleveland the areas of the LEA were surveyed more often than others with amalgamations across the County with only a few exceptions. The latest move of proposed amalgamations in the Redcar area brought a very surprising result: one school which does not meet the criteria set by Mr. Baker, i.e. a minimum roll of 900, and has in fact only 400 pupils yet has been allowed to stay open while nine others, much

larger, have been amalgamated. It is interesting to note that with a Labour Council the school has twice been under threat of closure, however the area in which this school is situated has a Conservative MP. The location of the school, Saltburn, is not such that pupils would have great distances to travel to an alternative school so it does seem inappropriate that it should be allowed to remain open. Questions are being asked re. political manipulation¹ although the Headteacher is quite certain that it is by its own merit that the school has survived both attempts at closure.

In East Cleveland there are three schools which do not conform to Mr. Baker's criteria of 900 pupils on roll.² There are approximately 1,500 pupils in total in the three schools. The schools remain open because of their geographic location; they are not at very great distances apart but accessibility in poor weather causes problems on the edge of the Yorkshire Moors. However, the future of these schools is constantly reviewed since the economics of maintaining three schools where two would be more than adequate obviously causes the Education Committee concern. It is because of this concern voiced by the Chairman of the Education Committee that possible solutions are being investigated.³ Currently the Research and Intelligence Unit have financed a review of the schools' positions with the support of MSC. A consortium management is being looked into which at the moment is in its early stages.

The background of the area and of each school plays an important part in the experiment. East Cleveland has evolved from a collection of small villages and as far as the inhabitants are concerned they are still separate villages: there is no feeling of identity or unity simply

because they are collectively called East Cleveland. The rivalry and occasional aggression between them continues. The villages concerned are Loftus, Brotton and Skelton. Family ties are very marked, with generations of families living within the village. There are new housing developments within each of the villages but the influx of new people has been mainly from outside of the area.

In the school at Loftus which is a Group 9, there are currently 521 pupils. For 1991 when an increase in the secondary school population is expected, the forecast roll is 554 with the low being 490 in 1989.⁴ The difference in rolls is really negligible compared with the surplus places within the school. There is very little housing development planned for the area since a large new estate was completed only a few years ago. The school is obviously subject to the small-school effect since it is effectively barely a four-form entry. The maintenance of the curriculum is therefore costly in staff terms.

In the Brotton School, again in Group 9, there are currently 578 on roll falling to 490 at the lowest but rising only to 497 in 1991.⁴ This must surely be of concern to the staff of that school since the school would appear to be at risk. Again very little housing development is planned and therefore there is no likelihood of a sudden increase in school population. This is effectively a three-form entry until 1991 when the intake at a projected 116⁴ will make it four forms.

The last of the three schools is in Skelton. The school has been built in the last decade, the reason for its existence was a planned housing development of several hundred houses. The plan was for an estate of starter-type homes, three-bedroomed semis and detached houses

of modest price. This appeared likely to create an increase in school population in the area. Until this school was built the 11-16 pupils were bussed to a nearby school in Guisborough or to the other two schools previously discussed. The distance and accessibility of these schools was not a major difficulty when only a few children were involved but would increase if there were to be many. So the school was built and designated as a Group 9. It was redesignated as Group 8 at the last triennial review: it has a fairly static number on roll of around 410. The problems began when the proposed housing development never materialised and so the large increase in numbers of children in the area did not happen. Effectively the school was a white-elephant, unnecessary but there! It could be argued that if that school had never been built the problems of falling rolls would not have been so dramatic in the other two schools, since each would have about one-third of the pupils while the others went to Guisborough. However, even with an increase of about 140 pupils to each of the others they would still not reach the '900 pupil on roll' criteria of Mr. Baker's. There is no doubt that the Skelton school has increased the problem in East Cleveland but even without it the problem would still exist. So the search for an alternative to amalgamation within the area would have been necessary in any case; the existence of the Skelton school makes it more urgent. An interesting statistic which emerged from the research into the proposed housing in Skelton is that in Cleveland the figure for children of school age is 0.2 per household. This includes both primary and secondary, so for every five houses built there is only one child, according to the Research and Intelligence Unit of County Cleveland. This means that even had the housing develop-

ment taken place the school population would not have been very different overall although the distribution might have been different.

In a statement to the press the Chairman of Cleveland Education Authority stated almost as an afterthought, "Possible 'cluster' and 'consortium' arrangements are under investigation".⁵ The consortium to which he was referring is the one which embraces the three schools just described; it happens also to be the only one. In October 1985 a suggestion was put forward to the LEA from the advisory staff that a pilot consortium be researched using the three schools of East Cleveland. It was envisaged that the project would be in two stages: Stage 1 would be of an exploratory nature and Stage 2 would be the implementation of the findings from Stage 1. To begin this attempt a bid for supporting monies was put to the Research and Intelligence Unit within the Authority, so that the three Headteachers concerned could second themselves for preparatory discussions in the Spring of 1986. Despite the ancient rivalry between the villages in which the schools are built, their philosophies are very similar and the Heads have a good relationship with one another. The preliminary discussions were planned with certain points in mind, namely, the rationalisation of courses, sharing of resources and expertise, and co-ordination of certain activities such as special sports training, musical activities and work experience. The Heads were aware of a need to modify working day timings and also to introduce a modular approach to the curriculum especially at 4th and 5th Year levels so that facilities could be shared more readily. The bid for funds was successful and the project began in April 1986 amidst a work-to-rule and strike action by the NAS and NUT unions. It was not an easy time for the Heads to be away from

their schools and it demonstrates the support given to the scheme by the Deputies. The Heads closeted themselves away for three full days for the initial discussions, the outcome of which was an agreement that there was a way forward towards a consortium.

With that agreement the next step was to sell the idea to staff in each school. By this time there were rumours of bussing children and staff back and forth, sharing classes and so on; staff were wary of any suggestions at this stage. The Heads had to convince staff that the rumours were unfounded but if the need arose to share facilities etc. there might have to be some movement. It is a measure of their own management skills that they were supported by their staff who were ready to talk among themselves and to each other. This was remarkable since discussions of this nature between staff from different schools are rare due to the inherent wariness of teachers of anything which threatens to change their pattern of work. To enable the three staffs to meet on neutral ground, important since no school should be seen as the leader, further funding was requested from the Research and Intelligence Unit so that a residential weekend conference could be held. By Autumn 1986 the Research and Intelligence Unit had agreed to a further year's funding for the project and the MSC had agreed to finance a weekend conference.

In November 1986 sixty staff from the three schools met for two days at an hotel in Ullswater; senior advisory staff and representatives of the MSC and the TVEI project were also present. The attendance at this weekend conference demonstrated the degree of commitment to the principle of co-operation between schools. Those who could not attend were given the opportunity of discussing the outcome of the conference

and to vote for the steering committee set up as one of the results. Prior to the conference as a result of meetings within the schools, separate initiatives were already under way. These included exploration of joint curricular modules, joint PE activities, co-operation in other curricular activities, for example biological field studies and a joint submission for INSET for 1987. The conference agreed on the setting up of a joint steering group to oversee the implementation of joint activities within an agreed framework. The aims of the conference were to encourage trust and confidence amongst the staff of all three schools; to review the facts behind the need for a consortium or alternative; to look ahead and find a way forward (see Appendix 5). The management of personnel involved with the proposed consortium is being given high priority since it is only with the fullest co-operation of all staff that the project can be successful. It is also important that staff feel responsibility for and involvement in the project.

The project began in April 1986 and the aim then was to explore and effect measures which would extend the educational opportunities existing in East Cleveland schools. It was to maximise resources available to counteract the falling roll problem, and the fact that they were already small schools and becoming smaller, by sharing staff, pupils, equipment and expertise. It was recognised that each school had its own individuality and differing approaches and it was hoped that despite the sharing of resources these individual factors would remain. By November 1986 at the end of the weekend conference, another expectation had been added: that opportunities normally offered to larger schools would be open to the group, for example the TVEI project.

It was hoped that the plan would enlarge the educational opportunities for each school while each could retain its own small-school individuality serving the needs of the surrounding community. The project was to be a pilot scheme and to pioneer the co-operative school idea within County Cleveland. It was to provide an alternative to the re-organisation, closure and amalgamation schemes which had been introduced in other parts of the county as the answer to the falling roll problem.

During all the preliminaries of this project one school had tended to be less enthusiastic than the others. This was the school which geographically and historically had the least to worry about in terms of viability. After the conference the statistics given about local birth-rates, housing and comparative school rolls changed that complacency into one of co-operation. It is one thing to know that the school roll is falling but it is very different to know that it is falling faster than the neighbouring schools. Hence the conference gave even greater impetus to the co-operative idea. After the weekend together, the school staffs returned to their own bases for staff meetings to discuss the outcome. A summary of the points which all schools felt needed further consideration or discussion is as follows:

1. the precise aims of the co-operative;
2. practical problems envisaged;
3. commitment needed from the staff to make it work;
4. the worries felt by staff.

An added problem was that one Headteacher was due to retire, and did so, at Easter 1987. This was a tremendous blow since she was whole-

heartedly in favour of the co-operative idea and had a committed, involved staff as many had been with her in the school from its first opening.

The outcome of the various staff meetings was the formation of a steering group. A nucleus of five people was voted into the group with the intention that other members of staff would be called upon to replace the originals. This idea was to ensure that all staff had the opportunity of serving in the group. In January 1987 a report had been compiled by the steering group of the progress which they felt had been made. Currently this report is not public but the exercise has been so far a positive step towards maintaining the small-school identity without loss of educational opportunity. If the project continues then the idea is to begin looking at a modular curriculum for September 1987 when the facilities, resources and expertise may be being shared by all three schools. To date the schools have shared a Biological Field Study residential course and various school social events.

There are generally some disadvantages in any scheme and the consortium arrangement is no exception. Children are normally well-balanced, sensible pupils for their home-based staff; it does not follow that they will be for visiting staff from another school in the group. This could cause considerable discipline problems. If the children are to be moved from base to base then the sense of ownership of equipment is lessened and the degree of care for machinery etc. not in the home-base will be less. The journey between bases takes time and with a well-planned delaying action the pupils could ensure that the journey takes considerably longer than antici-

pated. There is always the excuse "it is in the other building" to be tried. The list could go on and maybe it will, but if there is an underlying determination and commitment to make this consortium arrangement work, then it will be successful in spite of the problems. Many problems can be overcome if the personnel involved are willing to be flexible.

The schools of East Cleveland have been extremely fortunate in that their advisor from the LEA has been supportive of each of their separate identities. The idea of their remaining as individual schools is appealing since they are serving a community need. While they may all be far removed from Mr. Baker's recommended 900 on roll they are fairly near to Fiske's⁶ ideal of 600.

In East Cleveland yet another pilot scheme is in operation. It is actually in the primary sector but for the purpose of this study that is immaterial since it is the philosophy behind the scheme which is important. This scheme is termed a "cluster" arrangement and consists of a group of three establishments being managed by one Head-teacher. Two of the three establishments are in a village called Skinningrove and the other is in Carlin How. The distance between the two school bases is not more than three-quarters of a mile. There is, however, a major road and an extremely awkward bank dividing the two. The villages are typical of East Cleveland; they have a rivalry akin to hostility and the idea of amalgamating the schools is unthinkable in this instance. At a public meeting held to explore the possibilities of closing the Skinningrove Schools there was so much dissent that another solution had to be found and this was the cluster arrangement.

The Skinningrove school base is divided into two buildings: a nursery and a primary school. The number on roll pre-cluster was 30 in total; there was an acting head, one full-time teacher and several part-time staff totalling 1.5 in all. The age range was pre-school up to 11 years which meant that mixed age classes had to be taught simply because of the low numbers. In Carlin How there was a Group 5 primary school with the age range of 5-11 years, with a nursery class staffed by the school. There was again an acting head in the school. Together the two schools only justified one Headteacher so it was decided to appoint one Head and have one Deputy Head so that a senior management person could be on site in both establishments.

The post of Headteacher was advertised and brought some surprising results: only one of the acting Heads already in post applied, while the other requested early retirement. The Head was duly appointed - a male - and the deputy who had applied for the post showed himself willing to stay as deputy under the new arrangement. Circumstances were to alter those plans quite markedly. The male deputy who was willing to stay was promoted to a Headship, the other deputy - female - then decided to stay and did so for four more terms and then retired at 50 with no enhancement. The newly appointed Head is a local man who understands the problems which exist between the communities of East Cleveland. He does not belong to either of the villages involved but from another village twelve miles away. On his appointment he was made aware that he would have to educate the parents from each village into accepting each other if the school was to have a genuine identity. The LEA had decided that the name for the cluster should be Carlin How with the two buildings in Skinningrove to be called

annexes. In one of these annexes lunches were to be served for all the Skinningrove children. There is a field centre based in one annexe which serves all County Cleveland schools.

The Skinningrove buildings are reached by a lane which winds down into the heart of the village. The village has some six streets of terraced houses, some only recently built and a scattering of older type detached houses. The whole area is tiny and tucked between two hills. Originally it was a mining village and even though there has been no mining for many years, the atmosphere remains. The school buildings are close to the tiny beach and the old mining works and only yards up the lane is an abattoir. Broken down allotment huts, overgrown gardens and defunct mine buildings are common features of the village. Only a few hundred yards up the hill sits Carlin How, it can be reached by steps cut into the hillside or by road. There is no bus service between the villages so the only way for a child to commute is to walk. This factor was the main reason that the buildings in Skinningrove were allowed to remain open. Councillors pushed push-chairs up the steep hill from Skinningrove to Carlin How; they pushed them down again; they walked up and down the steps between villages and then agreed - there was no way that children of that age group could go to school in Carlin How alone and no way in which parents could deliver or collect them readily. The buildings, therefore, remained open.

Carlin How has very little advantage over Skinningrove. It is perched at the top of a bank overlooking the derelict mineworks of Skinningrove. Once a thriving area, this is now a backwater since the closure of the British Steel plant in the village. It is bigger

than Skinningrove but is built on similar lines with many streets of terraced houses and a few detached ones. There is an abundance of workingmen's clubs and public houses. Being so small, there is no secondary school and children go to one of the three schools discussed earlier, depending on where they live and of course which their parents prefer. The school is the only one in the village so it is multi-denominational.

Originally the schools remained as they were pre-cluster with Skinningrove children going to the annexes and Carlin How children going to the main school building. This arrangement satisfied all the parents but it did not satisfy the Head nor was it the intention of the LEA that this situation should continue. The Head began to integrate the pupils by putting all P4 and P5 children together, and P6 and P7 together, for two days each week - one day in each building and by team teaching. This not only integrated the pupils but also the staff. At the beginning of this exercise there were some parents who objected but not so strongly as to cause any real difficulty. Slowly there was an acceptance of this especially since a bus was made available to carry the children from one building to the other. This service is called 'Loftus and Brotton Wheels' and is funded by the MSC. It is not solely for school use but also ferries people of all ages to different venues. Once the first step had been made towards integration the Head decided that all children would spend Friday afternoons together in the main building. He holds an assembly and choral practice each week - he is Music/PE trained - encouraging budding guitarists and recorder players to join in. By this time all P4-7s were together for two and a half days each week. This has been increased since September

1986 and P4-7s are fully integrated. The Head believes that it is this age group which benefits most from the stimulation and competition of their peers. The integration of pupils has never caused many real problems; odd misunderstandings have arisen but they have soon been cleared up. Sporting activities and group projects have been encouraged, spanning the two communities so that the children are mixing after school as well as during the school day. It is fortunate that the Head is PE trained since it is his privilege to referee all manner of sporting events, but he sees this as an opportunity to extend the feeling of unity to the parents.

The parents are, on the whole, very supportive and because they are also physically near the school they feel free to wander in at any time. It is because of this open-door approach that parents can see for themselves the benefits for their children of mixing with larger groups of a similar age. Parents are encouraged to bring their expertise into the school. One father, an unemployed joiner, is a great help in woodwork and model-making. All of the staff except the Head are female so practical skills like this are greatly appreciated. This season has seen a major breakthrough in integrating the parents, that is a fathers' football team. I understand that there is much hilarity and little skill but the team spirit is there.

There is still a long way to go in terms of breaking down reserves between the two communities but a start has been made. Educationally there is much progress which can be evaluated positively. Children from Skinningrove have greatly improved their reading and numerical ages, probably due to greater competition, possibly due to the difference in response to what is now expected of them. Whatever the reason,

if improvement can be seen then there must be some degree of success in the venture. The steps from Skinningrove to Carlin How are now well-used, especially after school hours, which can only be interpreted as a positive development for the future.

Within this particular cluster arrangement the facilities of both primary schools were good. Both are Victorian buildings that have been well maintained. There are always some disadvantages whatever the age of building. The resources of each were good so now as one unit they are even better. Exchanges have been made with other schools for equipment which was duplicated and the best use is being made of the physical nature of the buildings, for example the hall in the main building, lends itself to PE lessons far better than any accommodation in the annexe. In short, the Head is ensuring the very best use of facilities, equipment and human resources for the educational and social good of the children and the communities which the school serves.

If this cluster arrangement is successful at primary level then there is every possibility that it could be used at secondary level also. It would in fact be more easily managed at secondary level since the Deputy Headteachers have less of a teaching load and regularly undertake more management tasks than are normally required of a Deputy in a primary school. The Deputies in a secondary school would have the time and autonomy to run the buildings in the cluster. This already happens in split-site amalgamated secondary schools where the Deputy is in charge of one building. The cluster arrangement does not seek to amalgamate schools but to allow the individuality of each unit to continue under the guidance of one Headteacher. This would do much

to alleviate problems associated with amalgamation and is a possibility for the future at secondary level.

The alternatives to amalgamation in County Cleveland have so far had encouraging results. It is early days to predict total success but there do seem to be positive benefits from both the consortium and cluster arrangements. If amalgamation is impossible then viable alternatives have to be found which are not too costly to the community. The major task is to ensure that parents understand the problems and the reasoning behind the solutions suggested. With the 1986 Education Act, the involvement of more parents into school organisation may encourage the dissemination of more information.

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CHAPTER 8

SUMMARY

With the dramatic fall in school population from its peak of around 4.1 m in 1978-9 to 2.8 m in 1991-2¹, there had to be some means of removing the surplus places. The varying responses to this need by the local authorities surrounding County Cleveland and Cleveland itself have been discussed earlier. Within County Cleveland the response was to amalgamate non-viable schools wherever possible. Non-viable was defined as less than six-form entry. There is one notable exception to this within the county, that being a school of only 429 on roll. The proposed amalgamation of this school with another was stopped due to political pressure from the local Member of Parliament, along with the usual pressure from parents. There are other schools with similar rolls but amalgamation is not a viable option due to awkward geographic locations.

Alternatives to amalgamation have been tentatively explored within the county with some degree of success. There is one cluster arrangement with one Headteacher successfully managing two schools. This is at Primary level where there are other examples in other counties, for example Cornwall, Cambridgeshire and Clwyd. As yet there are no cluster arrangements in secondary schools but there would appear to be no real barriers to prevent this from happening in the future. One Headteacher could administer more than one school since at Secondary level there are Deputy Heads who already manage the everyday running of schools. Sharing a Headteacher would not present problems in the day to day management while policy decision meetings could be held in the various schools when necessary. This would have the advantages of maintaining some vestige of parental choice, the separate schools could maintain their identities and the trauma of amalgamation need

never be experienced. It is possible that catchment areas may need to be altered so that buildings could be taken out of use to comply with the government requirements but with careful planning this could be advantageous to both the schools and local authorities if the older and therefore more maintenance-demanding buildings were removed. It would be a worthwhile experiment as an alternative to amalgamation. The other alternative of a consortium is of benefit to the children concerned by the non-shrinking of the curricula in the schools. It also saves salaries of staff since resources can be shared but it has yet to be seen whether it is a workable solution. The idea of sharing is sound but it is the practicalities which may be the downfall of this solution. However there is always the possibility that if this is not viable then the cluster idea could be used. The schools are both small enough and close enough for one Headteacher to manage all three. Altogether they would only make one Group 13 school. The most positive aspect of the consortium is the readiness for change of the staff. They have assessed the problems and are willing to change. Using Gleicher's² formula:

$$C = DVF > X$$

where C = desired change

D = level of dissatisfaction of current state

V = quality and clarity of vision about alternatives

F = feasibility of the change

X = the material and psychological cost of the change.

Within these schools the staff have looked at the desired change together and shown their dissatisfaction. They have explored the

alternatives with working parties looking into feasibility and examples from other counties. A clear plan has been presented to the LEA which is impressive (this is not as yet available to the public). The costs have been assessed as far as they are able to be since emotional cost may change with time. The whole exercise is a positive advance from the usual inertia encountered within many schools. The staff have been fortunate in the total involvement and support which they have from their advisor.

In 1980 Briault³ suggested the possibility of using the contracting school rolls of the 1980s as an opportunity for setting up 'a system of good schools'. Within these schools the Head and the staff would be fully aware of the whole operational future of the establishment. He suggested that this would 'reduce to a tolerable level the uncertainty and anxiety, and allow heads and teachers to concentrate on planning their management of the curriculum'. He was asking for a long-term plan for schools so that a contraction framework could be worked out and implemented sensibly over the contraction period. This would have been helpful in the management of contracting curricula since forecasts could have been realistic and the shedding of staff carefully planned. Staff may have been dismayed at this cold, logical approach at the beginning but it is far better to know the exact situation than to play at guessing games. Unfortunately this did not happen. There were mistakes made at the beginning of the contraction programme. In 1977 when the DES Circular 5/77 discussed the contraction in primary education, the LEA should have started the dialogue with secondary schools. Had people been made aware of the problems back in 1977 then by 1983 they would have been better prepared. There

are assumptions made by management, in this case the LEA, that everyone is aware of events around them. This is not the case (see Chapter 7); people have to be made aware and the facts given to them in such a way that they are readily understood. If secondary Headteachers had been directed to explain and discuss with their staffs the implications of the DES 5/77 document then the contents of the 2/81 circular would have been expected. No doubt some Headteachers did do this but it was left to the discretion of the Head. The communication from LEA to teachers needs to be improved to diminish the us/them situation of the present time. We are all in the same business; it is only our roles which are different.

With foresight the LEAs could have used the time between 1977 and 1981 to prepare Headteachers and senior management for the management of contraction and possible amalgamation. If all Heads had been involved none could have assumed that the finger pointed at their school. It was not good enough that discussions and meetings were held to explore contraction. A formulated approach with distinct skills being taught should have been used; nothing should have been assumed. It is taken that Headteachers are managers - this is not the case, some are poor managers. The courses should have four major areas of training:

1. To ensure awareness of the four key points felt by teachers to be of extreme importance: (a) self-esteem, (b) role, (c) territory, (d) anxiety, and to understand the management of these factors.
2. To learn coping skills needed for the contraction period since they are different from other situations, i.e. self stress-management.

3. How to cope with others under stress, including guidance and counselling skills (they should not be assumed attributes of any Head).
4. To formulate a policy of the best pathway through the contraction looking at delegation and involvement of staff as change agents.

This would have given a framework for development of awareness programmes within the schools. These points are supported by research by Chin and Benne⁴. There are lessons to be learned from the mistakes made so that next time the same mistakes are not repeated. It is now that programmes should be set up as INSET and ACSET courses for all senior management with the directive that information should be passed on during school INSET time. Mr. Baker has ensured that INSET days are part of the new working conditions, the LEA could ensure that some of these days are used not only for subject material but for the purposes outlined here.

From the literature available on organisations undergoing change there are eight points which are common to most in varying forms. These points are summed up by Isaac in his paper on 'Factors Involved in Change'⁵ and since they are directed at schools, they are expressed in a meaningful form as follows:

1. People will be unlikely to learn successfully unless they are given some territory without the need to compete for it.
2. Roles will be modified by personalities but they should be made clear initially.
3. The need to establish an agreed ideology is important since some roles cannot be made clear. This gives a background against which the role behaviour can be judged.

4. When ideology and roles are not clear individuals will become alienated and retreat into work that they understand.
5. The higher the degree of professionalism of the individual the closer he needs to work with people of significance.
6. Time should be allowed for 'settling in' new roles. Too little increases anxiety, too much inhibits change; people remain in their old roles.
7. People need time to learn new technologies and tasks especially when they are learnt on the job. They will be badly carried out at first but should improve.
8. There should be opportunities to allow staff to take on different roles with different audiences to allow development.

Using these points as guidelines and keeping the four key issues of self-esteem, anxiety, role and territory in mind, the amalgamation of Brackenhoe can be explored.

In the initial stages of amalgamation the policy of the school was set out by the Headteacher. There was no consultation about this even with his deputies. The policy was published and distributed for display on staff noticeboards. No discussion about the ideology ever took place publicly with all staff present, i.e. no staff meeting with regard to ideology or policy took place. Within this policy there were no guidelines indicated for role background and since no job descriptions were issued the roles taken were very much by personal judgement. Role expectation is a crucial feature of a cohesive staff; roles should be monitored regularly. It is not sufficient to put out a directive that meetings must be held by Heads of Departments and Heads of Years if there is no general policy of the roles these people

are playing. There are examples of staff becoming alienated because the role which they have assumed does not fit with that attributed to them by other staff. If the policy of the school had been agreed by staff and hence role-expectations explored by the whole staff this might not have happened. Discussions would have also helped in maintaining the self-esteem of staff, especially those who had not been appointed to their previous level. Staff management was never tackled at a formal level; it was ignored possibly in the hope that it would go away. I have spent an inordinate number of hours counselling staff who have feelings of despair and demotivation because of the lack of support. Staff meetings are not a normal occurrence - there have been five in the new school between September 1983 and September 1986. There are lines of communication but not an open-forum where all staff can hear the views of others and meaningful discussion can take place. The anxiety level remains high and there is still little feeling of team-spirit.

For the first two years of the new school the three original buildings remained in use with no modifications which affected teaching areas. One factor which causes anxiety is territory. There was no reason to move anyone from their own patch. Communication within departments had to occur and staff would have had to move between buildings for this. As it was, some staff were moved while others remained in their previous rooms. This caused an immediate problem since those being moved felt at a disadvantage. Many complaints were made to the Head who had made the decisions of where to put people but they were ignored. He failed to understand the feelings of anxiety of some staff. I believe that had no movement occurred the staff would

have been requesting change before the end of one academic year. The logistics of moving books, equipment, staff and pupils would have prompted the request. If this had come from the staff then they would have been happy to move and not anxious. Careful management of this would also have improved communication between departments as bidding for space and the reasoning for it with others must break down barriers. The exercise would also have helped dispel the anxiety felt by some since there would have been opportunity to voice their opinions and to feel an integral part of a larger group.

In a similar way the psychological territory could have been protected. If a policy of 'no change' had been made with respect to courses which were compatible, for example Nuffield Science for 11-13 and Science For All (11-13), then by the end of a two year cycle of people working together the merits of both courses could have been assessed and staff would have requested change. Instead of this it appeared that a new school necessarily meant new courses with the result that many valuable resources were lost to the school. Resources of staff expertise and experience were destroyed by the demotivation effect of imposed courses at the wrong time. Anxiety prohibits learning. A new situation was the last place where new courses should have been tried. A settling-in time was needed and change would have happened in a gradual way, which Taylor supports as being the way most teachers work.⁶

A formalised approach for improving an organisation is needed so that the mistakes which have been made and the opportunities which have been missed can be corrected. Rogers⁷, in his book entitled 'Encounter Groups', sets out a set of aims for a development programme which has

the advantage of being readable as well as readily understood. Brackenhoe needs such a programme so that there is a recognisable course being taken with aims, objectives and goals so that achievements can be seen. 'Success breeds success' - an old saying, but one which seems to be true. Brackenhoe needs some success so that future success can be anticipated. It is needed not only for the staff but for the pupils who attend. By this amalgamation parental choice in a large part of the catchment area was removed. Other schools are either denominational, too distant, or oversubscribed from their own feeder schools so that children from our feeder schools requesting transfers really have little chance of being granted this. The community is in need of a good school for their children; it is also in our own interests to provide one. Parents were granted the right of choice by the Education act of 1980 but political pressures within this area have denied them this choice. Dennison, in 'Managing the Contracting School',⁸ supports the reasoning behind parental choice and suggests that stronger opposition from parents could change decisions. This has now been seen to be true in Cleveland with the maintenance of Huntcliff School. The LEA could have reorganised this particular base into two smaller schools of around 600 on roll. The schools would have maintained their identities, and parents their choice. With co-operation between the schools the best of the consortium and cluster philosophies within the County could have created two good schools.

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APPENDICES

APPENDIX 1

Cleveland's Roll Numbers and Strategies
for Amalgamation with reference to
Prissick Base,
i.e. Brookside and Bertram Ramsey Schools

To be submitted to the meeting of the Schools Sub-Committee to be held on Monday, 26th October, 1981

- 2 -

MIDDLESBROUGH AND SOUTH TEESIDE COUNTY
COMPREHENSIVE SCHOOLS
PUPIL FORECASTS AND SURPLUS SCHOOL PLACES

INTRODUCTION

- 1.1. In September, 1974, the Authority introduced a scheme for the re-organisation of County secondary education in Middlesbrough, which established two County "open access" sixth form colleges (Acklam and Marton) and ten 11-16 County comprehensive schools. The diocesan authorities adopted a similar pattern of organisation for Roman Catholic secondary education in Middlesbrough and one R.C. aided "open access" sixth form college (St. Mary's) and five 11-16 R.C. aided comprehensive schools also began to develop from the beginning of the 1974/75 school year, although two of these schools, St. Thomas's and St. Michael's, closed in July, 1981, and a new school, St. Paul's opened in the premises of the former St. Michael's School in September, 1981.
- 1.2. Thirteen County co-educational comprehensive schools cater for pupils aged 11 to 16 years who are resident in Middlesbrough and South Teesside, and the attached map shows the location of these schools and the boundaries and extent of their present catchment areas.
- 1.3. Ten of these schools are located on four "school bases" as follows:-
 - (i) Acklam Base
3 schools (Boynnton, Hustler and King's Manor).
 - (ii) Middlebeck Base
3 schools (Langbaugh, Southlands and Springfield).
 - (iii) Prissick Base
2 schools (Bertram Ramsey and Brookside).
 - (iv) Stainsby Base
2 schools (Oakland and Stainsby, each of which is situated on a separate site).

Each "school base" has a common geographical catchment area, as shown on the attached map. Under present arrangements the allocation of County pupils resident within a particular "base" catchment area is determined by a random alphabetical sequential method, which takes into account the attendance of older brothers and sisters at the schools on a particular base.

The three remaining 11-16 County schools are Coulby Newham, Nunthorpe and Ormesby, which are situated along the southern periphery of Middlesbrough and South Teesside. Each of these schools has its own separate geographical catchment area.

- 1.4. Appendix One gives details of the present 11+ allocation arrangements for County pupils resident in Middlesbrough and South Teesside.
- 1.5. Appendix Two provides the following information on the thirteen schools:-
 - (i) Their permanent nominal capacities based on the minimum teaching area formula formerly applied by the Department of Education and Science.
 - (ii) Their total nominal capacities (permanent and temporary) calculated in accordance with the current method of the DES for assessing the work station capacities of secondary schools.
 - (iii) Their original opening dates.
 - (iv) Total of pupils on roll in September, 1981.
 - (v) Total pupil forecasts for the period September, 1982 to September, 1988, inclusive.

These forecasts have been calculated on the actual numbers of pupils on the rolls of these thirteen schools at the beginning of the Autumn Term, 1981, projected forward by age groups to September, 1988. The projections make no allowance for family-type housing developments in Middlesbrough and South Teesside over the next five years or for other factors, notably 11-16 pupil migration from the area and the loss of County pupils to independent schools catering for this age range.
- 1.6. Based on the DES work station capacity formula, temporary mobile accommodation provides a total of 372 pupil places distributed amongst seven of the thirteen schools, as shown in Appendix Two. These temporary places consist of one triple demountable unit, four double mobile units, five single mobiles and one temporary mobile science laboratory.
- 1.7. Appendix Three summarises the annual projections of family-type housing completions and demolitions in Middlesbrough and South Teesside for the period 1st September, 1981, to 31st August, 1985, inclusive. These forecasts were obtained from Cleveland County Research and Intelligence Unit in July, 1981. In addition this Appendix shows the 11-16 pupil product which may arise from these housing developments. However, it is noteworthy that, notwithstanding the increase in the housing stock in Middlesbrough and South Teesside by over 2,570 units in the period 1st April, 1974, to 31st August, 1981, inclusive, (see Appendix Four), the

total number of 11-16 County pupils on roll in September, 1981, (10,599), was actually 697 fewer than the number forecast in January, 1976, for the beginning of the 1981/82 school year without taking into account these additional houses.

2. REVIEW OF STATISTICS

- 2.1. The permanent nominal capacities of the thirteen schools total 13,335 pupil places at present, as shown in Appendix Two, which will increase to 13,670 places by September, 1983, assuming the completion of the second phase of Coulby Newham Secondary School by this date and the removal of all temporary mobile accommodation from the appropriate schools.
- 2.2. Pupil projections for the seven school years commencing September, 1981, indicate that the number of surplus pupil places is expected to increase gradually as follows:-

	Sept. 1982	Sept. 1983	Sept. 1984	Sept. 1985	Sept. 1986	Sept. 1987	Sept. 1988
Total Permanent Nominal Capacity based on the DES Work Station Capacity Formula	13,335	13,335	13,670	13,670	13,670	13,670	13,670
Total County (11-16) Pupil Forecasts as shown in Appendix Two.	10,503	10,343	10,074	9,767	9,537	9,108	8,666
SURPLUS PERMANENT PUPIL PLACES	2,832	2,992	3,596	3,903	4,133	4,562	5,004

- 2.3. Appendix Three shows an anticipated net increase of 2,660 family-type houses in Middlesbrough and South Teesside for the period 1st September, 1981, to 31st August, 1985, inclusive. However, it is most unlikely that these housing developments will produce a substantial increase in the number of 11-16 pupils residing in this area because of the continuation of two population trends in Cleveland: net loss by migration and re-distribution of existing inhabitants. In the Cleveland Research and Intelligence Bulletin (Number 9) published in Spring, 1981, it is estimated that net loss of population by migration "has increased from under 1,000 per annum in 1976 to about 4,000" in 1980 "and will average some 3,000 per annum in the next few years". Since April, 1974, there have been substantial housing clearances in central Middlesbrough, particularly in the Newport area, and considerable housing growth along the periphery of Middlesbrough and South Teesside, notably in Hemlington and more recently Coulby Newham.

3. MORE EFFECTIVE USE OF RESOURCES FOR EDUCATION IN CLEVELAND

- 3.1. From the overall statistics set out in paragraphs 2.2. and 2.3., it will be seen that a significant proportion of whatever resources are made available to the education service in future years would have to be deployed in maintaining in use for secondary school purposes many school buildings in Middlesbrough for which there is no real need. Moreover, the deployment of resources in maintaining these buildings would be occurring at a time when the real needs of the schools, such as the protection of the curriculum, the development of the new subject areas like computer studies and microtechnology, improving pupil teacher ratios and capitation allowances, and making adequate in-service training provision for teaching staff, could be better met if the resources which would otherwise be used to maintain redundant school buildings were re-deployed for those purposes.
- 3.2. It is estimated that the average cost, excluding staffing costs, of maintaining a 4 F.E. (600 places) secondary school is approximately £60,000 per annum, and a 6 F.E. (900 places) secondary school is approximately £90,000 per annum at 1980/81 prices.

4. THE NATIONAL SITUATION - DEPARTMENT OF EDUCATION AND SCIENCE CIRCULAR 2/81

- 4.1. This Circular, which is entitled "Falling Rolls and Surplus Places", sets out the educational and financial advantages of taking surplus school places out of use "as a result of falling rolls and population movement" and asks local education authorities "to review their plans for taking surplus school places out of use and to provide details of the action they intend to take up to 1986". The national background to the Circular is the decline in the total school population of England and Wales from a little under 9 million in 1979 to 8 million by 1983, with the prospect of a further fall to below 7½ million before the end of the decade. By 1986 the Department of Education and Science estimates that there will be over 3 million surplus primary and secondary school places in England and Wales and concludes that "about 1.3 million places could be removed by 1986 in England and Wales to the long term benefit of the education service". This figure represents just over 40% of the estimated surplus pupil places, so that 3 out of every 5 surplus places can be retained to allow for "the eventual upturn in births and the difficulty in practice of separating some notionally surplus places from places for which there is still a continuing requirement".
- 4.2. Circular 2/81 summarises the case for taking surplus pupil places out of use as follows:-
- " (i) a better range of educational provision can be made for pupils;
 - (ii) there is a direct saving;
 - (iii) the money saved can be put to more effective use in meeting important educational needs."

- 4.3. Whilst accepting that there is "no single agreed view about the minimum size of a secondary school", the Circular states that "Experience suggests, however, that 11-16 comprehensive schools of 4 - form entry and below find it difficult to offer a curriculum of appropriate range" and require "pupil ratios much more generous than the average" which "may have to be achieved at the expense of the Authority's larger secondary schools".
- 4.4. It is estimated that for every 100,000 surplus places taken out of use, there could be annual savings approaching £10 million, including heating, lighting, caretaking/cleaning and maintenance costs, but excluding any savings on teachers' salaries and the view is expressed that, "it is not acceptable at a time of constraints on expenditure to retain accommodation which is not strictly required at the expense of much needed teachers, books and other important educational resources." The Rate Support Grant settlements for local authorities are already assuming a greater rate of reduction in pupil places than is actually taking place at present.
- 4.5. As far as is practicable, the Secretary of State for Education and Science intends to assist local education authorities with the task of taking surplus school places out of use in four ways:-
- (i) In determining the levels of each authority's future capital expenditure attributable to education, account will be taken of the fact that dispensing with permanent school places often required some building work in order to expand or improve schools which receive pupils from closed schools.
 - (ii) The Secretary of State will endeavour to discharge his functions under Sections 12, 13 and 15 of the Education Act, 1980, as speedily as is consistent with an adequate consideration of each proposal to cease to maintain under-used schools.
 - (iii) He intends to press ahead with building studies, particularly in relation to secondary schools with the object of providing reports on costs and on examples of good practice.
 - (iv) The Secretary of State intends to play his full part in familiarising the public with the educational advantages of taking surplus school places out of use.

5. POSSIBILITIES

- 5.1. It is clear that in the light of the statistics summarised in Appendix Two and paragraph 2.2. of this report, and in the best interests of the pupils in the Middlesbrough and South Teesside schools as a whole, consideration should be given to the possibilities for taking permanent County secondary (11-16) school places out of use in Middlesbrough and South Teesside during the period 1983 to 1986. At the end of the 1982/83 school year it is anticipated that there will be almost 3,000 surplus permanent places available and this total is expected to increase to over 5,000 surplus pupil places by September, 1988.
- 5.2. In determining which schools should be considered for closure and/or amalgamation the following factors need to be taken into account:-
- (a) The size of a school in terms of the nominal capacity. The closure of a smaller school or the amalgamation of a small school with a larger school will cause less upheaval to both staff and pupils.
 - (b) The age of a school.
 - (c) The situation of a school in relation to the present and likely future distribution of 11-16 County secondary school pupils in Middlesbrough and South Teesside and whether it is located on a school base or a single site school serving a neighbourhood area.
- 5.3. With these factors in mind it is suggested that three of the following schools should be considered for closure or amalgamation in the period 1983 to 1984:-
- Oakland; Brookside; Southlands or Springfield; King's Manor; Ormesby.
- 5.4. Oakland School
- 5.4.1. With the exception of Coulby Newham Secondary School, which is situated in a housing growth area and is scheduled for a permanent enlargement of about 300 pupil places, Oakland School (606 places) is the smallest County secondary school in the area in terms of its permanent nominal capacity and pupil projections and a case can be made for its closure, or amalgamation with Stainsby School on the site of that school in July, 1983, or July, 1984.
- (a) To preserve the future viability of Oakland School it would be necessary to maintain the total roll at about 600 pupils, in spite of the gradual decline in the forecast of 11-16 County pupils resident in the Stainsby Base catchment area summarised overleaf.

	Permanent Nominal Capacity	Forecast Rolls						
		Sept. 1982	Sept. 1983	Sept. 1984	Sept. 1985	Sept. 1986	Sept. 1987	Sept. 1988
Oakland School	606	573	584	595	588	600	600	600
Stainsby School	1365	1039	984	941	854	794	682	599
Totals	1971	1612	1568	1536	1442	1394	1282	1199
	Est. No. of surplus places	359	403	435	529	577	689	772

The table above shows that a decrease of 440 pupils on the roll of Stainsby School is forecast during the review period. Unit costs will increase significantly at both schools and it will become increasingly more difficult to retain the present curriculum and subject options available at Stainsby School because pupil numbers at Oakland School will have to be maintained at about 4 - form entry.

(b) Oakland School was opened in 1937 and it is the oldest school in the area with the exception of part of King's Manor School where the original buildings were constructed in 1673, but they were enlarged and adapted in 1956 and 1968.

(c) The ultimate pattern of secondary education approved for the County Borough of Middlesbrough in mid-1964 envisaged that the buildings constituting the former Whinney Banks Boys' and Girls' Secondary Schools (now Oakland School) would eventually be discontinued for secondary education purposes.

- 5.4.2. If it is decided that Oakland and Stainsby Schools should be amalgamated, it may be necessary for a short period after the amalgamation to continue to use part of the premises of Oakland School but there is no doubt that the latter premises could be dispensed with at the latest by July, 1987.
- 5.4.3. If the Committee decides to amalgamate these two schools it may be desirable to make some adjustments to the admission zone for the Stainsby Base and this would necessitate offering parents of a number of 11+ pupils resident in the present Stainsby base catchment area places at one of the Acklam Base 11-16 County schools (Boynnton, Hustler and King's Manor) where there will be sufficient places available to allow such adjustments. A report on the detailed arrangements would be submitted to a future meeting of the Committee.

5.5. Brookside School

5.5.1. In terms of its permanent nominal capacity and pupil forecasts, Brookside School (700 places) on the Prissick Base is the second smallest County secondary (11-16) school in Middlesbrough and South Teesside, as shown in Appendix Two, and this school could either be closed, or amalgamated with Bertram Ramsey School (1,317 permanent places) on the same campus in September, 1983, or September, 1984.

5.5.2. Brookside School was opened in 1965 and the case for its closure or amalgamation is essentially the same as that submitted in relation to Oakland School in paragraph 5.4.1(a) of this report. The problems of its future viability, increasing unit costs and the maintenance of the present curriculum and subject options will arise because of the declining 11-16 pupil numbers resident in the present Prissick Base catchment area as summarised in the table below:-

	Permanent Nominal Capacity	Forecast Rolls						
		Sept. 1982	Sept. 1983	Sept. 1984	Sept. 1985	Sept. 1986	Sept. 1987	Sept. 1988
Bertram Ramsey School	1317	896	871	814	791	752	707	656
Brookside School	700	593	593	596	594	600	600	600
Totals	2017	1489	1464	1410	1385	1352	1307	1256
	Estimated No. of surplus places	528	553	607	632	665	710	761

5.5.3. If it is decided that Brookside and Bertram Ramsey Schools should be amalgamated, it may be necessary in the transitional period to continue to use part of the premises of Brookside School for teaching purposes after its amalgamation with Bertram Ramsey School, but it is clear that it will be feasible to dispense with the buildings by July, 1987 at the latest.

5.5.4. If the Committee decides to close Brookside School, or amalgamate it with Bertram Ramsey School in September, 1983, or September, 1984, it is unlikely that this would involve any significant adjustment to the admission zone for the Prissick Base although some minor adjustments may be desirable. A more detailed report on the arrangements would be submitted to a future meeting of the Committee.

5.6. The Middlebeck Base County Secondary Schools

5.6.1. There are three 11-16 County schools in the Middlebeck Base and their permanent nominal capacities, original opening dates and forecast rolls are tabulated below:-

	Permanent Nominal Capacity	Original Opening Dates	Forecast Rolls						
			Sept. 1982	Sept. 1983	Sept. 1984	Sept. 1985	Sept. 1986	Sept. 1987	Sept. 1988
Langbaugh	1407	1955	941	903	871	851	823	785	738
Southlands	956	1963 Extended 1972	714	690	663	641	615	590	554
Springfield	908	1959 Extended 1972	737	716	682	646	616	591	556
Totals	3271		2392	2309	2216	2138	2054	1966	1848
	Estimated number of surplus places		879	962	1055	1133	1217	1305	1423

The above table shows an anticipated increase of over 540 in the number of surplus places during the review period from almost 880 in September, 1981, to over 1420 places in September, 1987. The establishment of two viable schools both with total rolls in the range of 1000 to 1100 pupils, could be achieved if Southlands and Springfield Schools were amalgamated in either September, 1983, or September, 1984. During the transitional period it would be desirable to retain the use of both school buildings to ensure the continuity of the pupils' education, but in July, 1986, or 1987, either the present Springfield or Southlands School buildings could be taken out of use.

5.6.2. If the Committee decides to amalgamate these two schools it is unlikely to involve any adjustment to the admission zone for the Middlebeck Base. A more detailed report on the arrangements would be submitted to a future meeting of the Committee.

5.7. The Acklam Base County Secondary Schools

5.7.1. The table below summarises the statistical situation for the three 11-16 County schools on the Acklam Base.

	Permanent Nominal Capacity	Original Opening Dates	Forecast Rolls						
			Sept. 1982	Sept. 1983	Sept. 1984	Sept. 1985	Sept. 1986	Sept. 1987	Sept. 1988
Boynton	1251	1969	905	942	942	945	946	927	874
Hustler	1253	1969	915	949	946	949	946	927	874
King's Manor	892	1673 Enlarged 1956 & 1968	713	721	702	686	660	630	600
Totals	3396		2533	2612	2590	2580	2552	2484	2348
	Estimated number of surplus places		863	784	806	816	844	912	1048

The total rolls at the Acklam Base Schools are expected to decline by just over 180 pupils during the review period. Indeed, if the suggestions in this report relating to both Oakland and Brookside Schools are approved, pupil numbers at these schools could increase from September, 1983, onwards and this trend is likely to be reinforced by housing developments in Hemlington over the next few years. It is, therefore, suggested that the three 11-16 County schools on the Acklam Base continue in operation as at present.

5.8. Ormesby School

5.8.1. This school has a permanent nominal capacity of 840 pupil places and it was opened in 1967. Forecasts of pupil numbers and the estimated numbers of surplus pupil places at Ormesby School during the period up to September, 1987, are summarised below.

	Sept. 1982	Sept. 1983	Sept. 1984	Sept. 1985	Sept. 1986	Sept. 1987	Sept. 1988
Forecast Rolls	836	772	693	633	586	517	461
Estimated number of surplus places	4	68	147	207	254	323	379

5.8.2. Ormesby School is linked by a corridor to The Endeavour School for physically handicapped and delicate pupils and considerable numbers of secondary age pupils from this Special School are integrated into the school for a wide variety of subjects. The pupil forecasts for Ormesby School do not include any additional pupils involved in the integration arrangements.

5.8.3. It is most important that integration continues between these two schools, and it is recommended that Ormesby School should continue to operate as at present and that the admission zone for this school should be kept under review from September, 1984, onwards.

6. CONCLUSION

6.1. The Committee is requested to consider giving approval in principle to the following proposals in order to reduce surplus permanent pupil capacity at the 11-16 County secondary schools in Middlesbrough and South Teesside:-

- (a) the amalgamation of Oakland and Stainsby Schools from September, 1983, or September, 1984, with the intention of taking the Oakland School premises out of use for secondary school teaching purposes from a date to be determined,
- (b) the amalgamation of Bertram Ramsey and Brookside Schools from September, 1983, or September, 1984, with the intention of taking the Brookside School premises out of use for secondary school teaching purposes from a date to be determined,
- (c) the amalgamation of Southlands and Springfield Schools as from either September, 1983, or September, 1984, with the intention of dispensing with one of these school buildings for teaching purposes from a date to be determined.

6.2. The Committee is also asked to consider whether:-

- (a) to authorise the County Education Officer to consult the recognised teachers' associations, the teaching staffs concerned, appropriate Governing Bodies and parents for their views on the proposals in the report,
- (b) to request a further report on the views obtained, on the arrangements for the admission and transfer of pupils and on the staffing implications for the schools concerned.

APPENDIX ONE

MIDDLESBROUGH AND SOUTH TEESSIDE

PRESENT 11+ ALLOCATION ARRANGEMENTS FOR
COUNTY PUPILS RESIDENT IN THIS AREA

SCHOOL BASE/INDIVIDUAL COUNTY 11-16 SCHOOL	PRIMARY SCHOOL CATCHMENT AREA
(i) Acklam Base (Boyn-ton, Hustler and King's Manor Schools)	Ayresome Beechwood Fleetham Green Lane Hemlington Hall Linthorpe Newham Bridge Newport St. Hilda's C.E.
(ii) Middlebeck Base (Langbaugh, Southlands and Springfield Schools)	Berwick Hills Brambles Caldicotes Ladgate North Ormesby Pallister Park Park End Thorntree Northlands (part) (b)
(iii) Prissick Base (Bertram Ramsey and Brookside Schools)	Abingdon Breckon Hill Captain Cook (part) * (c) Easterside Lingfield (a) Marton Manor Marton Grove
(iv) Stainsby Base (Oakland and Stainsby Schools)	Acklam Whin Archibald Kader Whinney Banks
(v) Coulby Newham	Sunnyside Viewley Hill
(vi) Nunthorpe	Chandler's Ridge Nunthorpe The Avenue Captain Cook (part) (c) Ormesby (part south of Parkway)
(vii) Ormesby	Netherfields Overfields Northlands (part) (b) Ormesby (part north of Parkway)

NOTES:

- (a) Pupils who live in the Lingfield Primary catchment area but attend Captain Cook School are allocated to a school on the Prissick Base.
- (b) Pupils who live in the part of the Northlands Primary catchment area west of Cargo Fleet Lane and north of Bournemouth Road (i.e. Priestfields area) are allocated to a school on the Middlebeck Base; the others attend Ormesby School.
- (c) Pupils who live in that part of the Captain Cook, other than the area surrounded by and including Cypress Road together with Cedar Road, Cloverwood Close and Pinewood Road, attend a school on the Prissick Base. The remainder transfer to Nunthorpe School. However, pupils who have an older brother or sister still attending Nunthorpe School can attend that school if the parents make a written request to the Education Offices.

NOMINAL CAPACITIES, ORIGINAL OPENING DATES, ACTUAL PUPIL NUMBERS FOR
SEPTEMBER 1981 AND PUPIL FORECASTS FOR SEPTEMBER 1982 TO SEPTEMBER 1988 INCLUSIVE

20
RECORD

NAME OF SCHOOL	NOMINAL CAPACITIES FROM SEPT. 1981			TOTAL	ORIGINAL OPENING DATES	PUPIL NUMBERS								
	PERMANENT (Based on the DES minimum teaching area formula)	PERMANENT (Based on the DES Work Station Capacity Method)	TEMPORARY			SEPT 1981 (Act)	SEPT 1982 (Est)	SEPT 1983 (Est)	SEPT 1984 (Est)	SEPT 1985 (Est)	SEPT 1986 (Est)	SEPT 1987 (Est)	SEPT 88 (Est)	
ACKLAM BASE	Boynon	1,200	1,251	Nil	1,251	1969	892	905	942	942	945	946	927	874
	Hustler	1,200	1,253	Nil	1,253	1969	901	915	949	946	949	946	927	874
	King's Manor	900	849	43(a)	892	1673*	718	713	721	702	686	660	630	600
MIDDLE- ECK BASE	Langbaurgh	1,200	1,407	0	1,407	1955	971	941	903	871	851	823	785	738
	Southlands	900	956	0	956	1963 Extended 1972	731	714	690	663	641	615	590	554
	Springfield	900	908	0	908	1959	754	737	716	682	646	616	591	556
PRISS- ECK BASE	Bertram Ramsey	1,200	1,317	4(b)	1,321	1959	920	896	871	814	791	752	707	656
	Brookside	600	700	36(c)	736	1965	603	593	593	596	594	600	600	600
ORMESBY BASE	Bakland	570	606	48(d)	654	1937	570	573	584	595	588	600	600	600
	Stainsby	1,200	1,365	Nil	1,365	1952	1049	1039	984	941	854	794	682	599
	Cariby Newham	600	565	43(e)	608	1978	569	608	606	629	661	679	668	733
	Nunthorpe	1,200	1,318	76(f)	1,394	1963	1052	1033	1012	1000	928	920	884	821
	Ormesby	750	840	122(g)	962	1967	869	836	772	693	633	586	519	461
TOTALS		12,420	13,335	372	13,707		10599	10503	10343	10074	9767	9537	9108	8666

* Enlarged 1956 and 1968

* 900 permanent places when Phase Two is completed.

- (a) One double mobile unit (Careers and general teaching)
(b) One single mobile (shared use for disruptive pupils)
(c) One double mobile unit (Careers and R.E.)
(d) One double general teaching mobile unit

- (e) Two single general teaching mobiles from September, 1981
(f) One triple general teaching demountable unit

- (g) One mobile Science Laboratory, one double general teaching mobile and two single general teaching mobiles

MIDDLESBROUGH AND SOUTH TEESIDE

FORECASTS OF FAMILY TYPE HOUSING COMPLETIONS AND HOUSING DEMOLITIONS

1st SEPTEMBER, 1981, TO 31st AUGUST, 1985, INCLUSIVE

AREAS	NUMBERS OF HOUSES					TOTALS
	1.9.81 to 31.8.82	1.9.82 to 31.8.83	1.9.83 to 31.8.84	1.9.84 to 31.8.85		
1. Family Type Housing Forecasts						
CENTRAL MIDDLESBROUGH (MAINLY NEWPORT)	22	110	182	94	408	
ACKLAM/BROOKFIELD	9	41	82	90	222	
MARTON	135	134	110	26	405	
NUNTHORPE	Nil	Nil	Nil	Nil	Nil	
ORMESBY AND NORTH ORMESBY	Nil	Nil	Nil	Nil	Nil	
COULBY NEWHAM	364	440	383	410	1597	
HEMLINGTON	55	123	124	72	374	
Total Housing Forecasts	585	848	881	692	3006	
2. Housing Demolitions						
CENTRAL MIDDLESBROUGH (MAINLY NEWPORT)	228	61	Nil	57	346	
3. Net Increase in Housing Forecasts	357	787	881	635	2660	
4. 11-16 Pupil Product (Assuming 0.20 of a pupil per house)	71	158	176	127	532	

APPENDIX THREE

MIDDLESBROUGH AND SOUTH TEESIDE
ACTUAL COMPLETIONS OF FAMILY TYPE HOUSES AND HOUSING DEMOLITIONS
1st APRIL, 1974 TO 31st AUGUST, 1981, INCLUSIVE.

AREAS	NUMBERS OF HOUSES								TOTALS
	1.4.74 to 31.8.74	1.9.74 to 31.8.75	1.9.75 to 31.8.76	1.9.76 to 31.8.77	1.9.77 to 31.8.78	1.9.78 to 31.8.79	1.9.79 to 31.8.80	1.9.80 to 31.8.81	
Family Type Housing Completions									
CENTRAL MIDDLESBROUGH (MAINLY NEWPORT)	23	33	NIL	25	110	60	61	296	608
ACKLAM/BROOKFIELD	47	113	79	65	68	34	20	2	428
MARTON	46	92	81	132	111	41	89	58	650
NUNTHORPE	92	192	133	105	51	6	7	NIL	586
ORMESBY AND NORTH ORMESBY	90	130	NIL	NIL	NIL	NIL	3	8	231
HEMLINGTON	NIL	140	192	364	241	237	70	16	1260
COULBY NEWHAM	NIL	NIL	NIL	NIL	225	255	332	130	942
STANTON	NIL	NIL	41	186	205	NIL	NIL	NIL	432
Total Housing Completions	298	700	526	877	1011	633	582	510	5137
Housing Demolitions									
CENTRAL MIDDLESBROUGH (MAINLY NEWPORT)	230	460	342	254	235	232	216	403	2372
NORTH ORMESBY	32	88	61	7	5	NIL	NIL	NIL	193
Total Housing Demolitions	262	548	403	261	240	232	216	403	2565
Net Increase In Housing	36	152	123	616	771	401	366	107	2572

APPENDIX FOUR

To be submitted to the meeting of the Schools Sub-Committee to be held on Monday, 1st March, 1982.

MIDDLESBROUGH AND SOUTH TEESSIDE COUNTY 11 - 16
COMPREHENSIVE SCHOOLS
PUPIL FORECASTS AND SURPLUS SCHOOL PLACES - (SECOND REPORT)

1. PREVIOUS DECISIONS

1.1 A report showing pupil forecasts and surplus school places in the county 11 - 16 comprehensive schools in Middlesbrough and South Teesside was considered at a special meeting of the Committee on 6th November, 1981, when the following resolutions (Minute number 2256 of the meeting of the Education Committee held on 20th November, 1981) were approved:-

- 1) That approval be given in principle to the following proposals to reduce surplus permanent pupil capacity at the 11 - 16 county secondary schools in Middlesbrough and South Teesside:-
 - (a) the amalgamation of Oakland and Stainsby Schools from September, 1983, or September, 1984, with the intention of taking the Oakland School premises out of use for secondary school teaching purposes from a date to be determined;
 - (b) the amalgamation of Bertram Ramsey and Brookside Schools from September, 1983, or September, 1984, with the intention of taking the Brookside School premises out of use for secondary school teaching purposes from a date to be determined;
 - (c) the amalgamation of Southlands and Springfield Schools from either September, 1983, or September, 1984, with the intention of dispensing with one of these school buildings for teaching purposes from a date to be determined.
- 2) That the County Education Officer be authorised to consult the recognised teachers' associations, the teaching staffs concerned, appropriate governing bodies and parents for their views on the proposals contained in the report.
- 3) That the County Education Officer present a further report on the views obtained on the arrangements for the admission and transfer of pupils and on the staffing implications for the schools concerned.

2. CONSULTATIONS WITH INTERESTED GROUPS

2.1 In accordance with resolution 2) above, consultations have taken place, mainly through a series of meetings, on the Education Committee's recommendations to amalgamate three pairs of 11 - 16 county schools in Middlesbrough from either September, 1983, or September, 1984, with the:-

- a) teaching and non-teaching staffs of the six county 11 - 16 comprehensive schools concerned;
- b) recognised teachers' associations;
- c) appropriate Governing Bodies;
- d) parents of pupils.

2.2 Meetings with the Teaching and Non-Teaching Staffs of the six Middlesbrough County (11 - 16) Comprehensive Schools

2.2.1 Six meetings were held with the teaching staffs of Bertram Ramsey, Brookside, Oakland, Stainsby, Southlands and Springfield Schools in late November and early December, 1981. At each meeting the Education Committee's decision to approve in principle the amalgamation of three pairs of county 11 - 16 schools, in order to reduce permanent surplus nominal capacity, was fully explained. Particular reference at these meetings was made to the following factors:-

- (a) Sharply declining rolls forecast for the thirteen county 11 - 16 schools in Middlesbrough and South Teesside with linear projections showing a decrease in pupil numbers from the September, 1981, actual total of 10,600 to below 8,700 pupils by September, 1988.
- (b) A forecast of a substantial increase in total surplus permanent nominal capacity at these schools between September, 1982 (over 2,800 surplus places) and September, 1988 (5,000 surplus places).
- (c) In view of net migration of population from Cleveland, it was considered that estimates of surplus permanent capacity in Middlesbrough and South Teesside were likely to exceed the Authority's forecasts.
- (d) The need to use the scarce resources available to the education service to the best advantage, which involves taking a proportion of surplus school places out of use for secondary education purposes from dates to be determined. Dispensing with surplus places would allow resources to be deployed more effectively to meet the real needs of schools, including, for example, the improvement of pupil teacher ratios, the maintenance and development of the curriculum and the provision of stationery, text books and equipment.
- (e) The financial advantage of releasing surplus school buildings, which would produce average annual savings of approximately £100 per pupil place on maintenance and running costs.
- (f) The downward adjustment of future rate support grant settlements to take account of falling school rolls and the need for local education authorities to dispense with 40% of surplus school places, in accordance with Department of Education and Science Circular 2/81.

2.2.2 Four main issues, relating to pupils, teaching staff, non-teaching staff and buildings, were considered:-

(a) Pupils

The principal reasons for suggesting the amalgamation of pairs of schools was to minimise disruption to the education of pupils in attendance at two separate schools prior to the establishment of one new school and to ensure continuity in the education of pupils admitted to the newly reorganised schools after amalgamation. As far as practicable, pupils already on roll would remain in the same buildings with as little change in teaching staff as possible. Where necessary, minor adjustments would be

made to the admission zones of the new schools to enable 11+ intakes to be reduced and to allow one school building to be taken out of use from a date to be determined.

(b) Teaching Staff

Assuming approval of the amalgamation of three pairs of schools, it was explained that technically all six schools would close and three new schools would be established. A possible procedure for the appointment of teaching staff to the three new 11 - 16 county schools was outlined. It was emphasised that a draft staffing procedure would require full consultation with the recognised teachers' associations and the approval of the Education Committee. All teachers would be safeguarded financially in accordance with the Burnham Committee arrangements for reorganised schools. Provided that the present policy of the County Council was retained, there would be no redundancies; the redeployment of teaching staff would continue to be necessary because of sharply falling secondary school rolls, and would occur whether or not the proposed amalgamations were approved.

(c) Non-teaching staff

Reference was made to the County Council's present policy of no redundancies, although it was expected that some movement of non-teaching staff between sites would be necessary.

(d) Buildings

In order to make financial savings, it was intended to take over 2,000 surplus permanent pupil places out of use for secondary teaching purposes in Middlesbrough by the eventual closure of three school buildings, consisting of one of the three 11 - 16 school buildings on the Prissick Base (Bertram Ramsey Upper and Lower and Brookside Schools), Oakland School and either Southlands School or Springfield School on the Middlebeck Base. The closure dates for the selected buildings would be determined by the effective approval date for the proposed amalgamations and would probably occur four full school years after the establishment of the reorganised schools.

2.2.3 It was indicated that a second report on falling rolls and surplus places in Middlesbrough and South Teesside, which would include details of the outcome of consultations with the interested groups would be submitted to the Education Committee in March, 1982. At each meeting teaching and non-teaching staff were encouraged to ask questions and to make observations on the Education Committee's recommendations, and they were also invited to write to the County Education Officer if they wished to submit any further comments on the proposals. The following common issues were raised at these meetings:-

(a) Pupils

- (i) The continuity of education, particularly for fourth and fifth year pupils during the transitional period before and after the proposed amalgamations.
- (ii) The need for forward planning to minimise disruption of pupils' education.

(b) Staffing matters

- (i) More detailed consideration of the suggested procedure for the appointment of teaching staff and the likely time scale for the making of appointments. If the amalgamation proposals are approved, it was considered that staff appointments should be made as quickly as possible.
- (ii) Job security and the safeguarding of salaries, including S.P.A. allowances.
- (iii) The possibility of appointing temporary teaching staff during the interim period prior to the establishment of the proposed new schools.
- (iv) The possibilities of early retirements and redundancies.
- (v) Redeployment of staff, including the definition of the "reasonableness" of a post offered, "forced" redeployment and the payment of travelling expenses to redeployed teachers.
- (vi) Staff morale, status and staff movement. Concern was expressed that staff have become unsettled by the amalgamation proposals.
- (vii) Future career and promotion prospects.
- (viii) The staffing structures of the proposed new schools, including the assessment of school groups and points score allocations.
- (ix) In-service training plans, including the financial implications.
- (x) The possibility of introducing a job exchange scheme and re-training, together with counselling opportunities for teachers who wish to redirect their careers.
- (xi) Staffing establishments and the improvement of pupil teacher ratios, including the possibility of additional staff being made available to reduce the problems of temporary split-site schools (e.g. Oakland and Stainsby).
- (xii) The need to ensure an equitable balance of posts in the proposed new schools from the teaching staff of each pair of schools.
- (xiii) The protection and safeguards available for non-teaching staff.

(c) Buildings

- (i) The alternative future use of surplus educational buildings.
- (ii) The identification of the buildings to be closed, including proposed closure dates.
- (iii) The financial implications of dispensing with educational premises.

(d) Curriculum Considerations

- (i) The continuation of established courses for pupils following the proposed amalgamations.
- (ii) Liaison between pairs of schools in the period prior to amalgamations.
- (iii) Additional resources for curriculum development.

(e) Consultation Arrangements

- (i) The nature and duration of the consultation procedure, which was considered to be "far too short" by the teaching staff of one school.
- (ii) The need to keep parents, staff and pupils fully informed of developments, including the availability of statistics and copies of reports.

(f) Alternative Proposals

- (i) The possibility of single school closures rather than amalgamations.
- (ii) The gradual phasing out of individual schools without amalgamations.
- (iii) The possibility of involving Langbaugh School in the amalgamation proposal for the Middlebeck Base and establishing two schools from the three 11 - 16 county schools on this base. The view was expressed that Langbaugh School was being "preferentially treated".
- (iv) The alternative of continuing to use all the school buildings on Middlebeck Base, particularly as the schools serve a S.P.A. area.
- (v) The possibility of amalgamating Oakland and King's Manor Schools rather than Oakland and Stainsby Schools.
- (vi) The retention of the Brookside School buildings, particularly the sports hall, and the phasing out of use of one of two buildings of Bertram Ramsey School.
- (vii) To maintain two small schools of equal size on the school bases, e.g. Oakland and Stainsby, Brookside and Bertram Ramsey.

2.2.4 The following matters were raised by staff at the schools indicated:-

- (i) The procedure for registering objections to the proposed amalgamation (Oakland).
- (ii) The reduction in the range of parental preference if Oakland and Stainsby Schools are amalgamated (Stainsby).
- (iii) The difficulties of working on a temporary split site situation during the transitional period and the distance between Oakland and Stainsby Schools (Stainsby).
- (iv) The method of assessment of the nominal and surplus capacities of 11 - 16 schools (Stainsby).
- (v) The timetable suggested for implementing the proposed amalgamations. The view was expressed that the Committee were "rushing into this". (Stainsby).
- (vi) Concern about the possible overcrowding of Stainsby School (Stainsby).

(vii) The social disadvantages of closing a "community school". (Stainsby and Oakland).

(viii) The possibility of undertaking Minor Works projects if the proposed amalgamation is implemented. (Stainsby).

(ix) The possibility of further amalgamations of 11 - 16 county schools in Middlesbrough at a later date. (Stainsby).

(x) The optimum size of an 11 - 16 urban comprehensive school. (Bertram Ramsey).

2.2.5 The following written submissions have been received from the teaching staff indicated:-

- (i) A letter from Mr. H. Bulmer, the former Headmaster of Brookside School who retired on 31st December, 1981, suggesting that if the amalgamation of Bertram Ramsey and Brookside Schools takes place, then the buildings eventually used by the new school are those currently occupied by the Bertram Ramsey Upper and Lower Schools, together with the sports hall complex at Brookside School. In Mr. Bulmer's view this arrangement would have the benefit of the Technical Studies facilities of the former Brackenhoe School, and the Technical Studies and Art Block, which was recently upgraded and adapted, and is now used by Bertram Ramsey and Brookside Schools.
- (ii) A document (See Appendix One) signed by 32 members of the teaching staff of Brookside School supporting the retention of Brookside School as a small four form entry county 11 - 16 school and suggesting that one of the two Bertram Ramsey School buildings should eventually be taken out of use for secondary teaching purposes.
- (iii) A document (See Appendix Two) from Mr. N. Bertram the Headmaster of Bertram Ramsey School, supporting the Education Committee's proposal to amalgamate Bertram Ramsey and Brookside Schools with the intention of taking out of use one of the three buildings which now accommodate 11 - 16 pupils on the Prissick Base.
- (iv) A letter signed by all members of the teaching staff of Bertram Ramsey School expressing qualified support for the proposal to amalgamate Bertram Ramsey and Brookside Schools, bearing in mind the present economic situation. (See Appendix Three).
- (v) A letter from Mr. M.J. Hardy, the Headmaster of Stainsby School, submitting his observations on the proposed amalgamation of Stainsby and Oakland Schools (See Appendix Four).

2.3 Meeting with the Recognised Teachers' Associations

2.3.1 A meeting was held with representatives of the following five teachers' associations on 5th February, 1982:-

National Association of Head Teachers
Secondary Heads Association
Assistant Masters and Mistresses Association
National Association of Schoolmasters/Union of Women Teachers
National Union of Teachers
The views of the Professional Association of Teachers were also canvassed

2.3.2 The associations had previously received copies of the report and they were informed that the consultation meetings with other interested parties has been completed, and that a second report incorporating the views expressed on the proposals to amalgamate three pairs of schools in Middlesbrough, would be submitted to the Committee in March, 1982.

2.3.3 The issues raised by the teacher representatives are summarised below:-

- (i) The method of recording forecast surplus 11 - 16 pupil places in the first report on Middlesbrough and South Teesside, whereby all projected surplus places were shown and not just the 40% which the Department of Education and Science expect local education authorities to take out of use.
- (ii) The proportion of forecast surplus school places which it is estimated will be taken out of use throughout Cleveland by 1986.
- (iii) The method of assessment of the nominal capacities of 11 - 16 schools.
- (iv) The impact of parental preferences on pupil forecasts at individual secondary schools from September, 1982, and the net migration of secondary pupils from Cleveland.
- (v) Provision of more information for parents, including notes of parents' meetings and copies of reports.
- (vi) Details of the resolutions and conclusions arising from the three special meetings of the appropriate Governing Bodies (Bertram Ramsey and Brookside, Oakland and Stainsby and Langbaugh, Southlands and Springfield).
- (vii) Unanimous agreement that, if surplus 11 - 16 school places must be taken out of use, amalgamations of pairs of schools were preferable to school closures or the gradual phasing out of single schools.
- (viii) The alternative of maintaining two smaller schools of about 4 form entry, together with the taking out of use of certain buildings on school bases. The financial, staffing and curriculum implications of this option were discussed.
- (ix) The suggestion that there should be a three-month moratorium to enable the interested groups to consider more fully the Education Committee's proposals to amalgamate three pairs of 11 - 16 schools in Middlesbrough.
- (x) The suggested commencing dates for proposed amalgamations with particular reference to the current Burnham Report arrangements for the calculation of the school groups and points score ranges, which it was considered should be generously assessed.
- (xi) The revision of admission zones.
- (xii) Staffing matters, with particular reference to reduced promotion prospects, status and safeguarding arrangements.

(xiii) The need to make teaching appointments at the proposed new schools well in advance of the amalgamation dates.

(xiv) The establishment of a temporary split site situation at Oakland and Stainsby Schools if the amalgamation proposal is implemented, and the possibility of the short term use of temporary mobile classroom accommodation at Stainsby School as the solution to this problem, thereby accelerating the phasing out of use of Oakland School.

2.3.4 A letter has been received from the General Secretary of the Cleveland Division of the National Union of Teachers submitting the views of members on the amalgamation proposals (See Appendix Five).

2.4 Meetings with the appropriate Governing Bodies

2.4.1 Copies of the report on pupil forecasts and surplus school places in the Middlesbrough and South Teesside County Comprehensive 11 - 16 schools were circulated to all members of the Governing Bodies of Bertram Ramsey and Brookside Schools, Langbaugh, Southlands and Springfield Schools and Oakland and Stainsby Schools prior to the meetings, which were held in the first half of December, 1981. The report was considered page by page at these three meetings, and members discussed a wide range of issues, and the following matters not previously referred to in this report were raised at the Governors' meetings indicated:-

A - Pupils

(i) The need to provide a "continuing and stable environment" for pupils (Stainsby/Oakland).

B - Staffing Matters

- (i) The possible preference of staff for the closure of one school and "planned redeployment" of its staff, rather than amalgamation which would result in "fighting for jobs". (Stainsby/Oakland).
- (ii) Curriculum based staffing (Langbaugh/Southlands/Springfield).

C - Buildings

- (i) The formation of a training establishment on the Middlebeck Base (Langbaugh/Southlands/Springfield).
- (ii) Discussion on whether Southlands or Springfield School should be phased out of use (Langbaugh/Southlands/Springfield).

- (iii) The future viability of Ormesby 11 - 16 School, its integration with The Endeavour School and the likely expansion of special education provision (Langbaurgh/Southlands/Springfield).
- (iv) The facilities available in Oakland School and the comparative maintenance costs of schools (Stainsby/Oakland).
- (v) The justification for the extension of Coulby Newham 11 - 16 School (Stainsby/Oakland).

D - Educational matters

- (i) Academic standards and school discipline (Bertram Ramsey/Brookside).
- (ii) Choice of schools (Bertram Ramsey/Brookside).
- (iii) Option and "shortage" subjects (Bertram Ramsey/Brookside).
- (iv) The traditions and academic achievements of Stainsby and Oakland Schools. (Stainsby/Oakland).
- (v) Concern that parental preference would be removed if Oakland and Stainsby Schools amalgamated and the belief that parents would not wish their children to be "forced into a very large school". (Stainsby/Oakland).
- (vi) Concern that the new school would be an "unwieldy unit" and the belief that an amalgamation would cause greater disruption than a closure. (Stainsby/Oakland).

E - Alternative Proposals

- (i) The establishment of two four form entry comprehensive schools, one on the Oakland site and one on the Stainsby site. (Stainsby/Oakland).
- (ii) The establishment of two four form entry comprehensive schools on the Stainsby site. (Stainsby/Oakland).
- (iii) The closure of Oakland School in order not to disrupt the larger number of pupils for the sake of the smaller number. (Stainsby/Oakland).
- (iv) The closure of King's Manor School, and the admission of Hemlington pupils to the Stainsby Base to make both Oakland and Stainsby Schools viable. (Stainsby/Oakland).
- (v) The closure of Ormesby School. (Stainsby/Oakland).

F - Other Issues

- (i) Birth rate and emigration trends in Cleveland. (Bertram Ramsey/Brookside and Langbaurgh/Southlands/Springfield).
- (ii) The names of the proposed new schools (Bertram Ramsey/Brookside and Langbaurgh/Southlands/Springfield).

(iii) The varying sizes of the 11 - 16 schools and the adjustment of pupil intakes (Langbaurgh/Southlands/Springfield).

(iv) The possibility of adjusting the admission zone (Bertram Ramsey and Brookside).

2.4.2 The following extracts from the minutes of these three Governors' meetings summarise the views of the Governing Bodies on the amalgamation proposals:-

(i) Bertram Ramsey and Brookside

"RESOLVED that the establishment of one county 11 - 16 comprehensive school on Prissick Base by the amalgamation of Bertram Ramsey and Brookside Schools and the taking out of use of one appropriate school building, be supported".

(ii) Langbaurgh, Southlands and Springfield

"The Chairman concluded the meeting by stating that he considered there was support from some Governors for the Education Committee's recommendation to amalgamate Southlands and Springfield Schools from either September, 1983, or September, 1984, with the intention of dispensing with one of these school buildings for teaching purposes from a date to be determined, but no formal resolution was approved by the five members of the Governing Body present".

(iii) Stainsby and Oakland

"The Governors did not wish to make any resolution at this stage. They accepted the principle that three school buildings in Middlesbrough would need to be released over a period of years, but they indicated that they were not happy about the proposed amalgamation of Stainsby and Oakland Schools and they were opposed to the establishment of a split site school. In addition, the Governors felt closure of a school presented fewer problems than amalgamation.

It was generally agreed by the Governors that they required more information about possible alternative proposals for the Middlesbrough area before they could make any resolution regarding pupil forecasts and surplus school places in the Middlesbrough and South Teesside County Comprehensive Schools".

2.5 Meetings for the Parents of Pupils

2.5.1 In late November, 1981, a circular letter, which outlined the Education Committee's recommendations to amalgamate three pairs of county 11 - 16 schools in order to reduce surplus permanent pupil capacity in Middlesbrough and South Teesside, was distributed to the parents of approximately 5,400 pupils informing them that six meetings would be held in mid-December, 1981, and mid-January, 1982, to consider these proposals and to give parents the opportunity of making observations and raising queries. Letters were circulated to the parents of county pupils now in the present third (9+) and fourth (10+) years of their junior school course and parents of county pupils now in the first (11+), second (12+) and third (13+) years of their secondary education course.

2.5.2 County Councillor C. Godfrey, the Chairman of the Education Committee, took the chair at all six meetings. The proposals under consideration were explained in detail at each meeting and the factors and issues outlined in paragraphs 2.2.1 and 2.2.2 of this report were brought to the attention of parents.

Particular reference was made to falling secondary school rolls and the associated increase in surplus permanent pupil places within the admission zone of the appropriate school base and the need to use the resources available to the education service as efficiently as possible in the best interests of the pupils. The recommendation to amalgamate pairs of schools was reviewed with reference to permanent nominal capacities, pupil projections, surplus pupil places, staffing implications and the need to ensure as far as practicable the continuity of pupils' education and the effective date for an amalgamation. A provisional timetable for further consideration of the Education Committee's recommendations was outlined and reference was made to the Public Notice procedure, including the submission of objections.

2.5.3 Parents were invited to ask questions and comment on the amalgamation proposals and a broad range of issues were raised, most of which are referred to in paragraphs 2.2.3, 2.2.4, 2.2.5 and 2.4.1 of this report. Over 800 parents attended the six meetings and matters which were of particular concern to parents are summarised below:-

(i) Bertram Ramsey Parents' Meeting (Attendance: 25)

The major concern of parents was the continuity of education for pupils on the rolls of both Bertram Ramsey and Brookside Schools. A wide range of educational and financial issues were raised and no opposition was expressed on the proposal to amalgamate Bertram Ramsey and Brookside Schools. Questions were asked about the movement of pupils between three separate buildings, the possibility of an early and sudden closure of one school or of one building on the site, the possible alternative uses of a surplus building, the future size of teaching groups, financial savings, staffing arrangements, the possibility of an adjustment to the Prissick Base admission zone and the safeguarding of the curriculum.

(ii) Brookside Parents' Meeting (Attendance: Approximately 200)

There was strong opposition to the proposal to amalgamate Bertram Ramsey and Brookside Schools. The overwhelming feeling of the meeting was that Brookside School should continue as a separate four form entry 11 - 16 school and that the solution to increasing surplus permanent nominal capacity at Prissick Base was to close one of the two Bertram Ramsey buildings and to maintain a school of approximately 600 - 700 pupils in the remaining building. Reference was made to the good reputation of the school, financial savings, the need to ensure the continuity of pupils' education, emigration of population from Cleveland, curriculum considerations in a small urban comprehensive school, the relative maintenance costs of Brookside and Bertram Ramsey Schools and the possibility of an adjustment to the Prissick Base admission zone. Views were expressed that parental preference on the base would be 'destroyed' and it was possible that only one 11 - 16 school in Middlesbrough would cater for ethnic minority pupils.

(iii) Oakland Parents' Meeting (Attendance: Approximately 175)

There was strong opposition to the proposal to amalgamate Oakland and Stainsby Schools with the intention of eventually dispensing with the Oakland premises for secondary teaching purposes. The general feeling of the meeting was that Oakland School should continue as a four form entry comprehensive school and that an 11 - 16 county school on the Acklam Base should be closed. Concern was expressed that the amalgamation would establish a temporary split site school and that pupils might need to move between the Oakland and Stainsby premises. Views were expressed that two 11 - 16 county schools should be retained on the west side of Middlesbrough and it was necessary to 'maintain the community in Oakland'. There was parental support for the academic achievements and pastoral work of Oakland School. Other matters raised included the need to ensure the continuity of education, particularly for pupils, in the fourth and fifth forms, financial savings, the school's subject option scheme, parental preference, the future use of the Oakland premises and the time scale for the proposed amalgamation.

(iv) Southlands Parents' Meeting (Attendance: 20)

Parents were mainly concerned to ensure that the continuity of their children's education was maintained and no opposition was expressed to the proposal to amalgamate Southlands and Springfield Schools. Questions were asked about the "phasing out" of school premises, the reasons for the proposed amalgamation, staffing arrangements, pupil teacher ratios, the curriculum, future class sizes and school uniform, including costs. Support was expressed for the achievements of Southlands School.

(v) Springfield Parents' Meeting (Attendance: 14)

No opposition was expressed to the proposal to amalgamate Springfield and Southlands Schools. Questions were asked about financial savings if two school buildings continue in operation after the amalgamation, the arrangements for small option groups in minority subjects, parental preference, the "sudden" closure of one school, the future size of teaching groups, pupil teacher ratios, dispensing with one school building, "the financial burden on parents" of school uniform costs and the name of the new school. The view was expressed that parents should be informed "of developments as the plan evolves". Other matters raised included the projected size of the new school, the shortage of practical accommodation in Springfield School, and protection of the curriculum.

(vi) Stainsby Parents' Meeting (Attendance: Approximately 480)

Parents were strongly opposed to the Education Committee's proposal to amalgamate Stainsby and Oakland Schools with the gradual phasing out of use of the Oakland buildings. Particular concern was expressed about the temporary establishment of a split site school, the movement of pupils and staff between two sites, the disruption of the education of pupils on the roll of Stainsby School and the "closure" of this school.

The view was expressed that Oakland School should be phased out of use as quickly as possible, thereby allowing Stainsby School to continue with increased pupil intakes and temporary mobile accommodation, if necessary. Reference was made to curriculum issues, the need for a more generous allocation of teaching staff to a split site school, the provision of transport to move pupils and staff between the two sites, the retention of the name and school badge of Stainsby School and the divided loyalties of two separate schools. Other alternatives suggested the transfer of Oakland pupils in "some phased and planned way" to Stainsby School with "some Oakland School teaching staff", the "planned redeployment" of Oakland School staff to other schools over the next five years and the amalgamation of Kings Manor School with either Hustler or Boynton Schools.

2.6 Letters and Documents from Parents and other Bodies

2.6.1 At each meeting parents were invited to submit formal comments on the amalgamation proposals if they wished to do so and the following letters and documents have been received:-

- (i) Three letters from parents of pupils on the roll of Brookside School supporting the retention of Brookside School, and suggesting the operation of two small 11 - 16 county schools of about four form entry on Prissick Base using the Brookside premises and one of the Bertram Ramsey School buildings.
- (ii) A letter from a Brookside School parent supporting the retention of this school.
- (iii) A document (see Appendix Six) from the Brookside Parents' Action Group opposing the proposed amalgamation and supporting the retention of two small 11 - 16 county schools on Prissick Base with the phasing out of use of one of the Bertram Ramsey School buildings.
- (iv) Three letters from the parents of Stainsby School pupils objecting to the proposed amalgamation of Oakland and Stainsby Schools. In two cases the parents suggest that the possibility of amalgamating two of the three county 11 - 16 schools on the Acklam Base should be examined as an alternative.
- (v) A letter from the Chairman of Stainsby School Parent/Teacher Association expressing the Association's opposition to the proposed amalgamation of Stainsby and Oakland Schools and suggesting that Oakland School should be phased out of use as quickly as possible by the transfer of its pupils to Stainsby School and other neighbouring county 11 - 16 Schools in Middlesbrough.
- (vi) Another letter from the Chairman of Stainsby School Parent/Teacher Association, together with a petition signed by 292 persons, protesting "at the way in which the consultation meeting held at Stainsby School on 12th January, 1982, was conducted, and at the lack of information provided by the Education Committee".

(vii) A copy of a letter sent to Sir Keith Joseph, the Secretary of State for Education and Science, by the parents of a pupil on the roll of Oakland School protesting at the proposed amalgamation of Oakland and Stainsby Schools with the intention of dispensing with the Oakland School premises and supporting the continuation of Oakland School.

(viii) A document from Oakland School Association opposing the closure of that school. (See Appendix Seven).

3. REVISION OF PUPIL FORECASTS

- 3.1 The earlier report submitted to the Committee on 6th November, 1981, contained pupil forecasts for the thirteen Middlesbrough and South Teesside 11 - 16 county comprehensive schools which were compiled in the Autumn Term, 1981.
- 3.2 Revised pupil forecasts have recently been calculated for the seven school years commencing September, 1982, on linear projections of the numbers of pupils on the rolls of the county secondary schools in Middlesbrough and South Teesside and their contributory primary schools at the beginning of the Spring Term, 1982 and they are shown in Appendix Eight. These projections do not take into account the 11 - 16 pupil product which may arise from family-type housing developments forecast for Middlesbrough and South Teesside over the next five years, 11 - 16 pupil migration from the area or loss of pupils to independent schools.
- 3.3 These forecasts are included to provide the Committee with the latest linear projections available for these county 11 - 16 schools and to indicate the most recent forecasts of total surplus permanent places at the thirteen schools. The permanent nominal capacities of the thirteen schools now total 13,335 pupil places and will increase to 13,670 places by September, 1983, assuming the completion of the second phase of Coulby Newham 11 - 16 School by this date. The number of surplus pupil places is expected to increase significantly as follows:-

	Sept. 1982 Est.	Sept. 1983 Est.	Sept. 1984 Est.	Sept. 1985 Est.	Sept. 1986 Est.	Sept. 1987 Est.	Sept. 1988 Est.
Total Permanent Nominal Capacity Based on the DES Work Station capacity formula	13,335	13,670	13,670	13,670	13,670	13,670	13,670
Total County (11 - 16) Pupil forecasts	10,502	10,321	10,029	9,703	9,458	9,034	8,569
Surplus Permanent Pupil Places	2,833	3,349	3,641	3,967	4,212	4,636	5,101

The above table shows that the number of surplus permanent pupil places is expected to increase by over 2,250 during the review period.

- 3.4 Pupil forecasts, for the Middlesbrough and South Teesside area for the four school years beginning September, 1989, as compiled by the Cleveland County Research and Intelligence Unit in November, 1981, are:-

	Total 11 - 16 County Pupils	Surplus Permanent pupil places (assuming 13,670 places)
September, 1989	8,045	5,625
September, 1990	8,108	5,562
September, 1991	8,329	5,341
September, 1992	8,555	5,115

- 3.5 The forecast for September, 1988 (8,569) is almost 100 pupils less than the linear projection for the same date (8,666) which was compiled in the Autumn Term, 1981, and this fall shows the marked impact of emigration from Middlesbrough and South Teesside over a short period of less than six months.

4. THE AMALGAMATION OF PAIRS OF SCHOOLS

- 4.1 During the consultations on the Committee's recommendations the implications of the amalgamation of pairs of schools were fully discussed at most of the meetings, and it was emphasised that technically the proposals involved the closure of six 11 - 16 schools in Middlesbrough and the establishment of three "new" 11 - 16 schools accommodated initially in all the existing buildings, but eventually the intention would be to dispense with three school buildings (one of the three secondary school buildings on Prissick Base, Oakland School and either Southlands School or Springfield School). Over a maximum period of four full school years certain buildings would be taken out of use for secondary school teaching purposes, as pupil numbers decline sharply in the 11 - 16 county schools on Middlebeck, Prissick and Stainsby Bases.
- 4.2 The amalgamation of pairs of schools, rather than the "sudden" closure or gradual phasing out of individual schools, was proposed for two main reasons:-
- (a) Pupils in attendance at the six present schools at the time of the amalgamations would be expected to continue their education, as far as practicable, in their existing school buildings and it is anticipated that they would be taught mainly by staff who already knew them. Movement of pupils between sites would be slight, and the tendency would be for teaching staff to move rather than pupils. Amalgamation of two schools would minimise disruption to pupils' education and would provide a considerable degree of stability, security and continuity throughout the transitional period of change. In sharp contrast the closure or gradual phasing out of an individual school would create difficulties for the education of pupils. "Sudden" closure of a school would involve the transfer of pupils by age groups to other neighbouring

11 - 16 schools because it would be impossible for one secondary school in Middlesbrough to accommodate four age groups from a specific date, and, therefore, the continuity and stability of pupils' education would be badly disrupted. The gradual closure of a school would prompt parents to apply for the transfer of their children to neighbouring well-established schools and teaching staff would seek appointments elsewhere as soon as possible. Morale would decline rapidly and the education of pupils would suffer because staffing levels would have to be reduced and the maintenance of a limited curriculum would be very difficult.

- (b) The amalgamation of pairs of schools would be more equitable to the teaching staff because they would have the first opportunity of applying for posts in the single reorganised schools where they would be assured of an appointment and their salaries would be safeguarded. If a single school was closed, it would be necessary to redeploy the staff to other schools and there would inevitably be difficulties in identifying suitable vacancies because of declining 11 - 16 rolls throughout Cleveland and the high degree of stability amongst existing permanent teaching staff. Similar problems would apply to the staff of a school which is gradually phasing out of use.

- 4.3 If it is accepted that a substantial number of surplus permanent 11 - 16 places must be taken out of use in Middlesbrough and South Teesside, the advantages for pupils and staff of the amalgamation of pairs of schools over "sudden" school closures or the gradual "running down" of individual schools are substantial. This matter was discussed at the meeting with the recognised teachers' associations on 5th February, and there was unanimous agreement that the amalgamation of schools was preferable to school closures or the phasing out of single schools. (See sub-paragraph 2.3.3 (vii) and Appendix Five).
- 4.4 During the consultations on the Committee's recommendations, strong opposition was expressed on the amalgamation proposals involving Brookside and Bertram Ramsey Schools and Oakland and Stainsby Schools from the teaching staffs of Brookside (see Appendix One), Oakland and Stainsby Schools, the Governing Body of Stainsby and Oakland Schools (see sub-paragraph 2.4.2 (iii)) and at the Brookside School (see Appendix Six) Oakland and Stainsby parents' meetings (see sub-paragraphs 2.5.3 (ii), (iii), (vi)). Letters have been received from 8 parents supporting the retention of separate schools at Brookside (sub-paragraphs 2.6.1 (i) and (ii)) and at Oakland and Stainsby Schools (sub-paragraphs 2.6.1 (iv) and (vii)). A letter from the Stainsby School Parent/Teacher Association (see sub-paragraph 2.6.1(v)) and the document from the Oakland School Association (See Appendix Seven) express opposition to the proposed amalgamation of Oakland and Stainsby Schools.
- 4.5 In contrast, at the Bertram Ramsey, Southlands and Springfield parents' meetings (see sub-paragraphs 2.5.3 (i), (iv) and (v)) there was little opposition to the amalgamation proposals. The amalgamation of Bertram Ramsey and Brookside Schools was supported by the Governing Body of these two schools (see sub-paragraph 2.4.2 (i)), by the Headmaster of Bertram Ramsey School (see Appendix Two) and, with certain reservations, by the teaching staff of this school (see Appendix Three).

5.1 Varying degrees of support emerged during the consultations for other proposals as follows:-

5.1.1 Retention of all the existing County Comprehensive 11 - 16 Schools

There was strong support for maintaining the status quo at three parents' meetings (Brookside, Oakland and Stainsby), although it was recognised that the alternative would lead to the development of small urban 11 - 16 comprehensive schools with approximately 600 pupils on the rolls of four schools by September, 1988 (Bertram Ramsey, Brookside, Oakland and Stainsby) and the need to dispense with surplus school buildings on Prissick Base and at Stainsby School. The evolution of small four form entry schools was suggested as an alternative by the representatives of the recognised teachers' associations (see sub-paragraph 2.3.3 (viii)) and by the Governing Body of Stainsby and Oakland Schools (see sub-paragraphs 2.4.1E(i) and (ii)) and was supported by the teaching staff of Brookside School (Appendix One), the Brookside Parents' Action Group (Appendix Six), the Oakland School Association (Appendix Seven) and was put forward as an alternative at the remaining staff meetings.

Whilst accepting the evolution towards small 11 - 16 schools would produce gradual change, the national survey by Her Majesty's Inspectors of School ("Aspects of Secondary Education") considered the educational limitations of small secondary schools and showed that the range of subjects was restricted when the intakes into comprehensive schools were three to four form entry or less. Department of Education and Science Circular 2/81 states schools of this size "offered, for example, limited opportunities in modern and classical languages and the separate sciences, because they could not afford to provide for the very few pupils in them who wished to have, and were likely to make effective use of, such opportunities. Small schools face the dilemma of a choice between excluding some subjects entirely or devoting much of the time of a few specialist teachers to a small minority of pupils in small groups. Moreover, staffing limitations can cause many subjects, including English and Mathematics, to be taught by teachers who lack specialist training or experience in them: such expedients can reduce the quality of the education provided. The problem is not confined to small schools but bears more heavily upon them because of their comparative lack of flexibility. Small schools are also particularly vulnerable to the effect of teacher shortages in certain subjects.

There is no single agreed view about the minimum size of a secondary school. Experience suggests, however, that 11 - 16 comprehensive schools of 4-form entry and below find it difficult to offer a curriculum of appropriate range and to provide sufficient teaching groups, without the support of staff/pupil ratios much more generous than the average; such ratios may have to be achieved at the expense of the authority's larger secondary schools".

The document submitted by Oakland School Association (see Appendix Seven) considered the range of external examination courses now offered at this school and concluded that "Oakland School, despite being smaller than many comprehensive schools, is able to provide a large number of external examination subjects without additional staff and is consequently an extremely viable economic unit". However, total pupil numbers at this school have been stabilised at about 600 each year, and the continuation of the arrangement, whereby approximately 120 11+ pupils are admitted to Oakland School each September, would be to the detriment of Stainsby School pupils, where the total roll would decline from 1,052 in January, 1982 to 581 pupils by September, 1988, a projected fall in excess of 470 pupils over seven years (See Appendix Eight).

The alternative suggested by the Oakland School Association of reducing the permanent nominal capacity of Stainsby School by taking part of the buildings out of use for secondary school teaching purposes and gradually reducing the school roll to below 600 pupils by September, 1988, is considered "undesirable" by the Headmaster of Stainsby School. (See Appendix Four) for the following reasons:-

- (a) The Stainsby buildings would be wastefully used if occupied by only 600 pupils. It would be difficult to close down one half because specialist provision (e.g. Craft, Home Economics, Art, some Science, the Library) is not available in both sections. The service areas (e.g. Dining Halls) would have to be fully maintained. It might be feasible to close down some of the projecting "wing corridors" containing normal classrooms.
- (b) The curriculum offered to pupils would be impaired if the roll declined much below the present level. If the curriculum were protected then a more generous staffing level would be needed and therefore no real financial saving would result.
- (c) Organisational features might arise which would be disadvantageous to pupils e.g. reduction in possibilities for "setting", reduction of teaching groups in some subjects, timetable difficulties.
- (d) A larger institution gives better opportunities for some important aspects of education (e.g. extra curricular activities, better resources, some social features)."

No opposition was expressed to the amalgamation proposals for Bertram Ramsey and Brookside Schools and Southlands and Springfield Schools at the Bertram Ramsey, Southlands and Springfield parents' meetings (See sub-paragraph 2.5.3 (i), (iv) and (v)). The document submitted by the Headmaster of Bertram Ramsey School (See Appendix Two) supported the proposed amalgamation of this school with Brookside School, and, with certain reservations, the teaching staff of Bertram Ramsey School (See Appendix Three) considered "that, of the proposals so far submitted, the amalgamation of the two schools will have the least effect, in the long term, on the staff, pupils and general well-being of Bertram Ramsey". The retention of Brookside School as a small school of approximately 600 pupils would lead to a forecast decline of over 230 pupils on the roll of Bertram Ramsey School between January, 1982 (1982) and September, 1988 (1988).

(a) The possibility of amalgamating Oakland School and Kings Manor School rather than Oakland and Stainsby Schools was suggested by the staff of Stainsby School. The prime disadvantages of this proposal are that Oakland and Kings Manor Schools are located on different school bases and serve separate admission zones and the revision of the admission zones would inevitably involve three schools rather than two.

(b) At the Stainsby School parents' meeting the possibility of amalgamating Kings Manor School with either Hustler School or Boynton School was suggested as an alternative to the proposed amalgamation of Oakland and Stainsby Schools. In the first report on Middlesbrough and South Teesside it was suggested that the three 11 - 16 county schools on the Acklam Base should be retained for the following reasons:-

(i) Pupil numbers are expected to decline by just over 180 pupils at these three schools between 1982 and September, 1988, which is considerably less than the forecast decreases at the other three bases where the projected falls in pupil numbers (See Appendix Eight) are:-

Middlebeck Base	- almost 640 pupils
Prissick Base	- over 230 pupils
Stainsby Base	- over 440 pupils

(ii) Future family-type housing growth in Hemlington and Coulby Newham may necessitate a reduction in the extent of the admission zone for Coulby Newham 11 - 16 School and a consequent increase in 11+ intakes to the three Acklam Base county secondary schools in future years.

(c) The possibility of involving Langbaugh School in the amalgamation proposal for the Middlebeck Base and the establishment of two schools from the three existing 11 - 16 county schools on this base was raised at the Southlands and Springfield staff meetings, and was discussed at the meeting of the Governing Body of Langbaugh, Southlands and Springfield Schools. The view was expressed by staff that Langbaugh School was being "preferentially treated". With a permanent nominal capacity of 1,407 pupil places, Langbaugh School is the largest of the three schools on Middlebeck Base, and its retention is justified by its size. The involvement of this school in the amalgamation proposals for this base is unnecessary and undesirable in relation to the continuity and stability of pupils' education.

5.1.3 The Closure of Separate Schools without Amalgamations

The possibility of closing individual schools was discussed by the Governing Body of Stainsby and Oakland Schools (See Sub-paragraph 2.4.2 (iii)) and at the staff meetings at Southlands and Stainsby Schools. This possibility was also raised at the Bertram Ramsey, Oakland and Stainsby parents' meetings and was suggested as an alternative by the Oakland School Association (See Appendix Seven). Three schools were suggested for a sudden closure (Kings Manor

Oakland and Ormesby) and arguments against this alternative are referred to in paragraphs 4.2 and 4.3 of this report. The Governors of Stainsby and Oakland Schools felt that school closures presented fewer problems than amalgamations and the views of this Governing Body are summarised in sub-paragraphs 2.4.1 E (iii), (iv) and (v) of this report. At the Stainsby parents' meeting it was suggested that Oakland School should be phased out of use as quickly as possible. The case for retaining Kings Manor School is outlined in sub-paragraph 5.1.2 (b) of this report, and the first report on Middlesbrough and South Teesside recommended the continuation of Ormesby School in view of its integration with The Endeavour School for physically handicapped and delicate pupils.

5.2 Dates for the Proposed Amalgamations

Two dates (either September, 1983, or September, 1984) were suggested for the proposed amalgamations during the consultations. The timetable suggested for implementing amalgamations was discussed at the Stainsby School staff meeting and the view was expressed that the Committee were "rushing into this". This matter was also discussed at the meeting with the representatives of the recognised teachers' associations, with particular reference to the current Burnham Report arrangements for the assessment of school groups and points score ranges for re-organised schools and the same point was made in the letter from the General Secretary of the Cleveland Division of the National Union of Teachers (See Appendix Five). The Headmaster of Stainsby School suggested that the amalgamation of Stainsby and Oakland Schools should be delayed until pupil numbers "have declined a little more". (See Appendix Four). Apart from these representations, the suggested dates for the amalgamations gave rise to little adverse comment.

5.3 Admission and Transfer of Pupils

As indicated in paragraph 4.1 of this report, the recommendations envisage the phasing out of use of three school buildings over a maximum period of four full school years after the effective date of the amalgamation proposals, or earlier if possible, and the educational advantages of amalgamating pairs of schools, rather than the sudden closure or gradual phasing out of separate schools were emphasised during the consultations and are summarised in paragraph 4.2 of this report. The continuity and stability of pupils' education was of major concern at all the parents' meetings, particularly for fourth and fifth year pupils during the transitional period before and after the proposed amalgamations, and this matter was raised at staff meetings and fully discussed by the Governing Body of Oakland and Stainsby Schools where reference was made to the need to provide a "continuing and stable environment". Concern was expressed that the "new" school would be an "unwieldy unit" and it was considered that parents would not wish their children to be "forced into a very large school". Although the educational advantages of amalgamation were not always recognised during the consultations, the representatives of the teachers' associations preferred the amalgamation of pairs of schools to the outright closure of single schools (see sub paragraph 2.3.3 (vii) and Appendix Five).

5.4 Revision of Admission Zones

This matter was raised at the meeting with representatives of the recognised teachers' associations, and the National Union of Teachers have requested further consultations on the "proposed changes to admission zones and the effect they will have on pupil numbers" (See Appendix Five). The possibility of admission zone adjustments were discussed by the Governing Bodies of Bertram Ramsey and Brookside and Langbaugh, Southlands and Springfield Schools and at the Bertram Ramsey and Brookside parents' meeting. It is likely that some adjustments will be required to the Prissick and Stainsby Base admission zones, and, subject to the approval of the Middlesbrough amalgamation proposals, a further report will be submitted to the Committee on admission zone arrangements for these two bases.

5.5 Expression of Parental Preference

At several meetings with staff, Governing Bodies and parents and in certain documents (See Appendix Seven for example), concern was expressed that the amalgamation of pairs of schools would reduce the range of parental preference available, in the opinion of Brookside, Oakland and Stainsby parents.

5.6 Creation of a Temporary Split Site School

Much concern was expressed by teaching staff, parents and the Governing Body of Oakland and Stainsby Schools that the amalgamation of these two schools, which are almost 0.75 of a mile apart, would establish a split site school for a maximum period of four years. The more generous allocation of teaching staff (See Appendix Five) to this proposed "new" school and the short term use of temporary mobile classroom accommodation at Stainsby School (See Appendix Four) were suggested as means of relieving this problem. It is the present policy to allocate additional teaching staff to split-site secondary schools in Cleveland.

5.7 Staffing Matters

A wide variety of staffing issues were raised at all six staff meetings (See paragraphs 2.2.3 (b) of this report) and by the representatives of the recognised teachers' associations (see sub-paragraphs 2.3.3 (viii), (x), (xii) and (xiii) of this report and Appendix Five). If the Committee approves these amalgamation proposals, further consultations with the recognised teachers' associations will be necessary to devise procedures for the appointment of teaching staff to the new schools before a report is submitted to the Committee on this matter.

5.8 Curriculum Issues

The following curriculum issues were raised during the consultation meetings with staff, Governing Bodies and parents:-

- (a) The continuation of established courses for pupils following the proposed amalgamations, particularly for small teaching groups in "minority" subjects.
- (b) Liaison between the pairs of schools on curriculum matters in the period prior to amalgamations.
- (c) The safeguarding of the curriculum, particularly in small urban comprehensive schools.

(d) Subject options schemes (Oakland School Association document - see Appendix Seven).

(e) The sharing of teaching staff by small schools for "minority" subjects.

5.9 Surplus Buildings

It was emphasised during all the consultation meetings that one of the main objectives of the proposed amalgamations was to dispense with surplus secondary schools by gradually phasing certain buildings out of use. In the discussions on this matter reference was made to the future use of surplus buildings, the time scale for school closures and questions were asked about which buildings would be taken out of use for secondary education purposes on the Middlebeck and Prissick Bases. A further report suggesting which school buildings should be dispensed with and on the timing for taking surplus buildings out of use will be submitted to a future meeting of the Committee, if the amalgamation proposals are approved.

6. CONCLUSION

6.1 In view of the outcome of the consultations with the interested groups on the proposals for the amalgamation of three pairs of county 11 - 16 schools in Middlesbrough, the Committee is requested to consider whether:-

- (a) To approve the amalgamation of Oakland and Stainsby Schools with the intention of taking the Oakland School premises out of use for secondary school teaching purposes;
- (b) to approve the amalgamation of Bertan Ramsey and Brookside Schools with the intention of taking one of the three 11 - 16 school buildings out of use for secondary school teaching purposes;
- (c) to approve the amalgamation of Southlands and Springfield Schools with the intention of dispensing with one of these school buildings for secondary school teaching purposes;
- (d) to approve the amalgamation of these three pairs of schools from either September, 1983, or September, 1984;
- (e) to authorise the County Education Officer to arrange for the publication of the appropriate statutory notices as soon as possible;
- (f) to approve the submission of further reports to this Committee in due course on matters relating to the procedures for the appointment of teaching staff, the admission zones for the three newly established schools and the taking out of use of surplus school buildings.

March, 1982

A.H.R. Calderwood
County Education Officer

APPENDIX 2

Cases for and against Amalgamation
on Prissick Base as submitted to the LEA

BROOKSIDE SCHOOL

The Case for Retention

Circulation : Members

Cleveland County Council
Bertram Ramsey -
Brookside Governing Body
Education Committee Added Members

Officers

Cleveland County Council Education Department
Department of Education and Science

J. D. Wiggins
J. Clacherty
L. E. Foster
A. Godfrey
T. Jordan
W. H. Reeve

Brookside School
January 1982

Brookside School : The Case for Retention

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4. Other Areas for Cost Saving
5. Falling Rolls
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7. Educational and General Aspects of the Amalgamation Option
8. Summary
9. Appendices

1. Introduction

It came as no surprise to the staff of Brookside School when in October 1981 the Cleveland County Council Education Committee indicated that the merging of Brookside and Bertram Ramsey Schools was being seriously considered.

This possibility had been speculated on for sometime for it was realised that the combined effect of falling rolls and determined even savage, government pressure for cuts in local government spending could oblige the County Council to consider such action, however reluctantly.

It is the clear belief of the staff however, that the proposed amalgamation is unsound on educational grounds and it seems very likely that the intended savings would be little better than those which would result from the alternative strategy set out in this document.

2. The Present Position - Frissick School Base

The base comprises five school buildings purpose built for secondary educational use. Of these five, two are used for the Marton Sixth Form College, two for Bertram Ramsey School and one for Brookside School. The County Council's proposal involves the taking out of use one of the three buildings used by the secondary comprehensive schools - Bertram Ramsey, and Brookside - and the amalgamation of these two schools to form a new school using the two remaining buildings.

3. The Main Areas for Cost Saving

It is accepted that substantial savings could occur from the closure and taking out of use of one school building but it appears that this worthwhile economy could be made (just as effectively) by retaining two schools in the two remaining and separate buildings as establishing a new school in the same two buildings.

4. Other Areas for Cost Saving

It seems likely that other savings would be minimal compared with those which result from taking a building out of use and it must be considered inevitable that in an amalgamated school a number of teachers would be employed in tasks below their protected teaching scale and salary.

5. Falling Rolls

It is accepted that a secondary comprehensive school becomes non-viable in educational terms, when rolls fall much below 600 and that certainly is true for a school smaller than 4 form entry. Consideration of the Table * below however indicates that the forecast rolls never fall below 1200 for the two present schools together and it is the strong belief of the staff therefore that on these figures alone the retention of the present two schools is viable.

* From Agenda Document, Cleveland Education Committee, Schools Sub-Committee meeting October 26th 1981.

	Permanent Nominal Capacity	Forecast Rolls						
		Sept. 1982	Sept. 1983	Sept. 1984	Sept. 1985	Sept. 1986	Sept. 1987	Sept. 1988
Bertram Ramsey School	1317	896	871	814	791	752	707	656
Brookside School	700	593	593	596	594	600	600	600
Totals	2017	1489	1464	1410	1385	1352	1307	1256
	Estimated No. of surplus places	528	553	607	632	665	710	761

The rolls position could be further affected to general advantage by the taking of one or more of the following courses.

- i. The extension of the Bertram Ramsey/Brookside catchment area to include part of the present Nunthorpe and/or Middlebeck catchment areas.
- ii. The extension of parental choice in the Nunthorpe and/or Middlebeck catchment areas to include the Bertram Ramsey/Brookside options.

Either of these strategies would have the effect of retaining parental choice in the Bertram Ramsey/Brookside catchment area, which the amalgamation proposals would extinguish and would further enhance parental choice in the Middlebeck and Nunthorpe areas.

6. Educational Aspects of Retention

It is sometimes held that a large school can offer more courses by option choice to pupils but reality is often less attractive, the breadth of scope all too often being negated by the virtually inevitable remoteness and less effective organisation which characterises many large schools.

It must also be stated that in September 1981 Brookside School offered no less than 25 courses to pupils about to enter their 4th year.

Minority subjects, such as Latin, are presently provided on a campus basis and it is clear that this could continue with the retention of the present two schools.

7. Educational & General Aspects of the Amalgamation Option

7.1. Disruption

With the best of endeavours it seems unlikely that the amalgamation of any two schools can be carried out without damaging disruption to the children of the schools at and around amalgamation time.

7.2 Discipline

It would be unfair to blame the present social cancer of violence and vandalism wholly on the trend in the 1960's towards large schools but experience has shown that standards of discipline and control tend to decline in large schools. There is a serious risk of decline in these respects if amalgamation is proceeded with.

7.3 Suitability of Existing Buildings

The proposed amalgamated school would be accommodated in two buildings purpose built for two schools but not purpose built for one large school (estimated size 1256 by September 1988). It could be difficult to establish a horizontal house system of the kind most generally used in large secondary comprehensive schools to diminish the damaging effects of a large institution.

8. Summary

We would urge that the proposed amalgamation of Bertram Ramsey and Brookside Schools be rejected on the following grounds:-

- i. The amalgamated school would be too large in terms of educational usefulness.
- ii. Only marginal cost savings would be achieved by amalgamation other than the savings made by the taking out of use of one building which remains possible with the retention option.
- iii. Parental choice would be denied in the Bertram Ramsey/Brookside catchment area.

We would further urge that the Bertram Ramsey and Brookside Schools be retained on the following grounds:-

- i. The major economy deriving from the closure of one school building will still be achieved.
- ii. Parental choice would be maintained in the Bertram Ramsey/Brookside catchment areas and could be enhanced in the Middlebeck and Nunthorpe areas.
- iii. Projected roll forecasts justify the retention of two secondary comprehensive schools on the Prissick Base and the roll situation could be enhanced by extending the Prissick option to parents in the Middlebeck and Nunthorpe catchment areas.
- iv. The four form entry school on the Prissick Base would continue to be viable on educational grounds considering the existing pupil/subject option in Brookside School and the certain continuation of minority subject cases on a campus basis.

Appendix 1

Bertram Ramsey/Brookside Catchment Area by Housing Districts

1. Central Middlesbrough (Part)
(bounded by Linthorpe Road, Park Road North,
Whitby Branch Railway)
2. Longlands
3. Grove Hill
4. Linthorpe (part)
5. Easterside
6. Marton
7. Nunthorpe (Part)

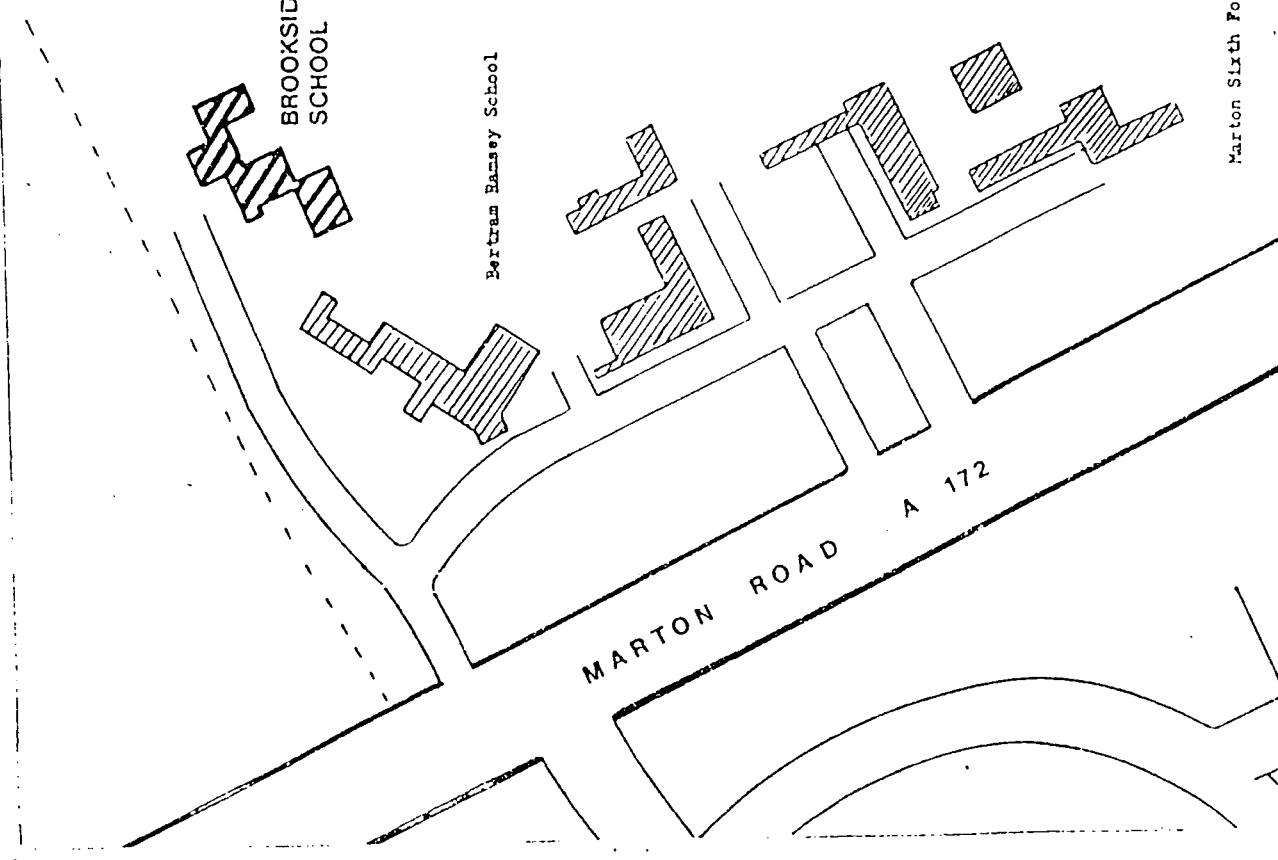


BROOKSIDE
SCHOOL

Bertram Ramsey School

MARTON ROAD A 172

Marton Sixth Form College



PRISSICK SCHOOL BASE

PUPIL FORECASTS AND SURPLUS PLACES, 1982-1988

SUMMARY

Proposals have been made by the County Education Authority relating to the closure and amalgamation of schools serving the Middlesbrough and South Teesside area. These proposals have been accepted as a basis for discussion by the Education Committee.

As far as the two comprehensive schools on the Prissick Base are concerned, the Authority's proposal was that Brookside School should be amalgamated with Bertram Ramsey School from September 1983 or 1984, with the intention of taking the Brookside School premises out of use for teaching purposes from a date to be determined.

This report presents an alternative proposal, based on the fact that Bertram Ramsey comprises two separate school premises. The oldest one of these should be closed, thus achieving lower heating and maintenance costs than the Authority's proposal. It is further proposed that Brookside and Bertram Ramsey Schools should not be amalgamated within the period under review, since the serious disadvantages of such a change would not be offset by any real saving in teacher salary costs.

This alternative is supported by the vast majority of parents of children currently at Brookside and at the feeder schools. It can be seen to be different from the usual 'parental protest' in that it accepts the need for economies and provides a better solution to the problem.

1. INTRODUCTION

- 1.1 The number of children between the ages of 11 and 16 for whom comprehensive school places will need to be provided during the period 1982-1988, is falling. Cleveland is no exception to this national trend. Some school places are no longer needed and the cost of maintaining partly-filled buildings is becoming insupportable.
- 1.2 In most cases the necessary savings in costs will only be achieved by closure of school buildings, or by their transfer to other purposes. The Department of Education and Science circular 2/81 points out that progress nationally has not been as fast as has been assumed in the Government's expenditure plans, which expect two out of every five surplus places to be taken out of use by 1986. Education Authorities are asked to urgently review their plans for dealing with the problem of surplus places and it is pointed out that the Secretary of State proposes to continue his general policy to approve proposals to cease to maintain under-used schools.
- 1.3 Figures provided by the Authority during a consultative meeting with parents illustrate the problem as far as it affects Brookside and Bertram Ramsey Schools:-

	September figures for school-years						
	1982	1983	1984	1985	1986	1987	1988
Forecast rolls	1489	1464	1410	1385	1352	1307	1256
Surplus places	528	553	607	632	665	710	761

(Surplus places are calculated on a total capacity of 2017 places).

2. BUILDINGS ON THE PRISSICK SCHOOL BASE

- 2.1 There are five distinct school premises on the Prissick Base:-
 - (i)&(ii) Marton Sixth Form College was set up when a scheme for re-organising county secondary education was introduced by the Authority in 1974. It comprises what were originally the Girls' High School and the Boys' High School.
 - (iii)&(iv) Bertram Ramsey School is an amalgamation of what were, until 1965, two separate schools - the original Bertram Ramsey Secondary School and Brackenhoe Secondary School. They are still known locally as the upper and lower schools.
 - The upper school shares an oil-fired central heating system with the adjacent part of the Sixth Form College.
 - The lower school is the oldest of all the buildings on the School Base, being first brought into use in 1959. It has a separate oil-fired central heating system which is expensive to run. Its flat roof has given serious maintenance problems.
 - (v) Brookside School is the newest of the buildings on the School Base, being first brought into use in 1965. It has an economical gas-fired central heating system. Building maintenance costs are low.

Each of the comprehensive school premises can accommodate 600-700 pupils, depending on the calculation formula used.

- 2.2 The facts given above illustrate the danger of using national average figures when choosing between one school building and another. It was accepted by the Authority's spokesman at the parents' consultative meeting that "Perhaps it was an unfortunate choice of words" to recommend that the Brookside School premises should be taken out of use.
- 2.3 It is obvious that there exists a lower-cost alternative to the Authority's proposal as it stands. A significant saving can and should be made by ceasing to maintain the premises of the original Bertram Ramsey Secondary School and closing them down as soon as possible.

TEACHING STAFF NUMBERS AND COSTS

- 3.1 Throughout the consultations with staff and parents, Education Committee and Authority spokesmen have assured staff that enforced redundancy would be avoided if at all possible. Such a policy would be compatible with maintaining the current teacher:pupil ratio, so long as the natural wastage of teaching staff matches the rate at which the pupil numbers are falling.
- 3.2 If, however, one of the main purposes of the proposed school closures is to increase the wastage rate of staff by being able to say to some of them that their job demonstrably no longer exists, then the assurances should be withdrawn. In the current national situation such tactics would inevitably lead to enforced redundancies.
- 3.3 This report makes the assumption that the assurances can be taken at face value. In that case, the factors that need to be considered in the light of school organisational changes are:-
 - (i) the effect on salary grades;
 - (ii) the cost of maintenance of earnings;
 - (iii) the prospects for realising as much as possible of the potential natural wastage.
- 3.4 The Authority's proposal to amalgamate Brookside and Bertram Ramsey Schools can be seen immediately to lead to an increase in costs on the first factor. The much larger school would attract higher Burnham salary scales for the head-teacher, heads of department and so on. Furthermore, staff have been assured that those members not appointed to such positions would have their current salary grades maintained. There would thus be no compensating savings against the second factor. Again, if these assurances cannot be taken at face value then they should be withdrawn.
- 3.5 On the third factor - the prospects for realising as much as possible of the potential natural wastage - the Authority's proposal would appear to have a clear advantage. It would be easier for one head-teacher of an amalgamated school to redeploy the remaining staff, adapting to teacher wastage to such an extent that the Authority could assume that the maximum was being achieved. However, the easiest solution is not necessarily the best, especially when educational and social factors are taken into account.

- 3.6 A sensible objective for teacher salary costs would be to avoid any increase on current budgets, whilst achieving an acceptable proportion of the potential natural wastage. The proposal made in this report would achieve this, given some more imaginative handling of staff wastage.
- 3.7 One possible scheme, commonly practised in the larger industrial companies that are also trying to operate a policy of no enforced redundancy, would introduce a site-level consideration of possible redeployment as follows:-
 - (i) Allow each school on a School Base to accept voluntary wastage from their staff, so long as they can reasonably cope by redeployment within each school.
 - (ii) When the departure of a particular member of staff would cause serious difficulties, an attempt is made to solve the problem by redeployment within the School Base. This would normally be expected to be resolved by agreement between the head-teachers and staff involved.
 - (iii) In exceptional cases, redeployment from elsewhere in the area of the Authority might be necessary.

4. EDUCATIONAL AND SOCIAL FACTORS

- 4.1 Educational and social factors are difficult to quantify and the overall balance must be a matter of subjective judgement. Three groups of people demonstrate the judgements they make about Brookside:-
 - (i) Over the past few years, visits by R.M.I. to the school have led to favourable comments to the headmaster.
 - (ii) A number of the staff at Brookside (including heads of department) applied to go there because of its reputation and because it was a smaller school. The majority do not wish to become part of a larger school, even though that may mean a higher salary for some of them. They particularly value their ability to know every child in the school, with every child knowing all the staff. The staff turnover rate at Brookside is low.
 - (iii) Parents express their judgement through parental preference for Brookside. We have evidence that, from a recent intake, over 100 children had to be turned away whose parents had asked for them to be sent to Brookside. This presents a totally different picture to the impression created by the Authority that they are having to keep the numbers at Brookside up at 600 in order to ensure its viability. The most common reasons given by parents for their preference are the good academic record and the high standards of discipline and care for the children. The smaller size of the school is seen to play an important part in this.
- 4.2 The opportunity for the exercise of this parental preference would be effectively eliminated if the Authority's proposal were to be accepted. There would be considerable disruption to children and staff and a good comprehensive school would have been closed.

5. THE CURRICULUM

- 5.1 Information is quoted in D.E.S. Circular 2/81, and is repeated by the Authority, to the effect that a larger, amalgated school would be better able to offer a wide curriculum. This is again a dangerous generalisation, based on national average statistics.
- 5.2 In the first place, it pre-supposes that a very wide curriculum that includes some relatively obscure subjects is both necessary and desirable. A number of parents question this, particularly in the current circumstances of economic constraint and youth unemployment.
- 5.3 In the second place, it belittles the achievements that have been made by co-operation between the staff of the two comprehensive schools and the Sixth Form College on the Prissick Base. Options currently made available include Latin, AO Maths, Spanish and Commerce. Even though there may be only one member of staff on the Base able to teach one of these minority subjects, such co-operation has meant that the curriculum option is freely available, without the need for peripatetic staff.
- 5.4 The idea that a head-teacher and his staff need to be totally self-sufficient over a very wide curriculum, even when the school is part of a School Base, is over-simplistic. With a degree of co-operation, the benefits of a larger number of staff, without the disadvantages of a large school, are easily available on a School Base. We cannot afford to ignore them.
- 5.5 In the third place, practical considerations about the members of staff who will not have left during the next six years show that the argument that higher salary grades will attract better teachers to a large amalgamated school must remain as merely supposition. If the other reason for amalgamation is justified - the fear of a staff surplus - then surely there would not be any recruitment of any such 'better teachers'? The curriculum can be no wider than that provided by the existing staff.

6. CONCLUSIONS

- 6.1 The D.E.S. Circular 2/81 suggests that the rationalisation reviews currently being undertaken by Education Authorities should include:-

Assessment of the ... condition of the school buildings;

A plan relating school building to the Authority's staffing and curricular policies;

Detailed costings ... of the plans and options;

Little or no information on these issues has been presented in consultation with parents. The indications are that they have been insufficiently considered by the Authority in making their proposal to amalgamate Bertram Ramsey and Brookside Schools and to take the Brookside School premises out of use.

When the issues are considered in detail and specifically in relation to the surplus pupil capacity on the Prissick Base, a better and less costly alternative appears.

- 6.2 Cleveland County Education Committee is requested to approve the following proposals in order to achieve the necessary reductions in building maintenance and operating costs and in teacher salary costs:-
- (a) taking out of use for secondary school teaching purposes the original Bertram Ramsey Secondary School premises.
 - (b) the continuation of Brookside and Bertram Ramsey Schools as separate four- or five-form entry schools.

CLEVELAND EDUCATION COMMITTEE

Headmaster:
N. BERTRAM, B.A., F.R.G.S.

Tel. M'bro. 317284

BERTRAM RAMSEY SCHOOL
MARTON ROAD
MIDDLESBROUGH
CLEVELAND
TS4 3RX

Ref: JTW/MW

11th February, 1982

County Education Officer,
Education Offices,
Woodlands Road,
MIDDLESBROUGH,
Cleveland.
TS1 3BN

For the Attention of Mr. Cosley

Dear Sir,

The teachers of Bertram Ramsey School are unequivocally concerned about the possible amalgamation with Brookside School.

The enclosed concise statement encapsulates the corporate feelings and views of the Bertram Ramsey Staff.

We shall be grateful if you will forward a copy of the Statement to Education Sub-Committee.

Yours faithfully,

Bertram Ramsey Staff.

Encl

CLEVELAND EDUCATION COMMITTEE

Headmaster:
N. BERTRAM, B.A., F.R.G.S.

Tel. M'bro. 317284

BERTRAM RAMSEY SCHOOL
MARTON ROAD
MIDDLESBROUGH
CLEVELAND
TS4 3RX

PROPOSED STATEMENT FROM THE STAFF OF
BERTRAM RAMSEY RE AMALGAMATION PROPOSALS

The staff of Bertram Ramsey are opposed in principle to the break up of their school. Many of the staff have spent a large part of their careers here and have a great affection for the school.

Whilst we would aspire to the ideal of a well staffed, well equipped, smaller school of, say, 600 pupils, able to offer the best educational opportunities, we recognise the existence of present financial restraints.

As concerned teachers we oppose the application of financial conditions on education and would have preferred the Authority to have seized this opportunity to provide the very best education for our children albeit at much increased cost.

With these reservations, we consider that, of the proposals so far submitted, the amalgamation of the two schools will have the least effect, in the long term, on the staff, pupils and general educational well being of Bertram Ramsey.

Therefore, if the reorganisation of the Friswick Base is to come about, we would add our qualified support to the proposal to amalgamate Bertram Ramsey and Brookside into one new school.

We would, however, like the following points to be considered seriously:

1. The closure and amalgamation should take place no earlier than 1984 when rolls will have fallen sufficiently to make amalgamation a realistic proposition. In fact, many of the staff have serious misgivings about teaching in a school containing over 1400 pupils given the present social climate.
2. In the meantime staffing should be kept above establishment in both schools on the base to maintain a reasonable pupil:teach ratio in the classroom.
3. Closure and taking out of use of one of the existing buildings should not take place before 1987 or until pupil numbers fall below 1300.



National Union of Teachers

General Secretary: J. D. CASWELL

16 Farley Drive, Acklam, Middlesbrough, Cleveland. TS5 8DT.

Tel: 89190

Richard Hind Primary School, Richardson Road, Stockton, Cleveland. TS18 3LG.

Tel: ~~XXXX~~ 607597

JDC/JR

12th February, 1982.

County of Cleveland,
Education Offices,
Woodlands Road,
Middlesbrough,
Cleveland.

For the attention of B. J. Johnson, Esq.

Dear Mr. Johnson,

Middlesbrough and South Teesside County
Comprehensive Schools

The above report has been considered at a Special meeting of members in all the Schools which could be affected by the proposals, at meetings of members in the individual schools and by the Divisional Council.

In addition to the case put forward in the document the Council believes that in the interests of balanced debate the alternative of keeping all six schools should have been included together with the pros and cons; even allowing that the conclusions contained in para 6 had remained unaltered.

Given the alternatives in the document the Council believes, however reluctantly, that the amalgamation of pairs of Schools is to be preferred to the outright closure of one of each pair of schools.

Should the Education Committee decide to implement the proposals contained in Section 6 then we would wish to be further consulted about :-

- (1) proposed changes⁵ to admission zones and the effect they will have on pupil numbers.
- (ii) the actual date of amalgamation, for it could be that 1984 could prove to be more advantageous to members of staff and thus by implication to the existing schools than 1983.

We are unable to make a considered judgment in the absence of estimated unit totals for 1987 and 1988 which would determine the Group of the newly established schools from 1983 or 1984 - and thus the structure which could be derived from the points allocation.

Continuation

2.

- (iii) the degree of preferential staffing to be permitted in respect of the split-site working, this being of particular relevance should Stainsby and Oakland Schools be amalgamated.

The Council await with interest the outcome of your consideration of its submission.

Yours sincerely,

J.D. Caswell,
General Secretary.

Use of Buildings on Prissick Base

This submission is based on the assumption that the proposed amalgamation of the Bertram Ramsey and Brookside School is approved by the Secretary of State for Education.

It is an outline of principles and not one of the detail that will be needed for final planning. Many of the determinants are unknown to the authors at this time, but there are items of educational provision which would necessitate consultation when these are known and the decision on commencement has been taken.

The reason for the amalgamation is that, owing to falling rolls in schools, the Department of Education and Science has required Local Education Authorities to remove from use any surplus buildings. It is the opinion of the Cleveland L.E.A. that as part of this policy it is in the best interests of the boys and girls in the Prissick area that a new school be established from the two existing ones and to close one of the presently occupied buildings as soon as possible. One of the provisions for amalgamation is that LEAs should be prepared to build on to older buildings if this would speed up effective amalgamations into a smaller number of premises.

Should a new school be established on the Prissick Base there are some basic points to be kept in mind for the best educational provision to result.

1. The amalgamation should not be perceived as a take over by one school or the other.
2. Real amalgamation into one building should take place to form one school.
3. Real amalgamation of staffing and resources should take place in effective terms, without retreating from present provision in the schools.
4. The pupil body should effectively become one as soon as practicable.

- 2 -

It is important in the eyes of Parents, pupils and staff that the new school is in fact a melding of the two previously existing schools, taking into account that the buildings of the two previous schools will form the physical basis of the new school.

The one building that should not be considered for closure is that which is presently the Bertram Ramsey Lower. This is not because of its intrinsic value as a building, but because of its actual location lying between the two other buildings, Bertram Ramsey Upper and Brookside. It would add unnecessary difficulties if this building were put to different use in trying to run one school separated by another institution.

The calculations of accommodation based on DES pupil station basis are:-

Bertram Ramsey Upper (ERU)	688
Bertram Ramsey Lower (BRL)	607
Brookside (Bk)	700
Thus combined figures are:-	
ERU + Bk	1388
BRL + Bk	1307
ERU + BRL	1317

There would seem little to choose between ERU+BRL and BRL+Bk in terms of housing pupils, and since there are other more educational arguments in favour of BRL+Bk this would seem to be the more favoured outcome. The details are argued in the following pages.

1. The proposed new school should not be perceived as a take over of one school by another. If the buildings of the present Bertram Ramsey School were used by the new school it would without doubt be seen as the larger school swallowing up the smaller. In the light of the early views expressed in the proposals as published by the Authority and subsequently taken up by the Press, many people connected with Brookside School in particular had the impression that this was the inevitable outcome. Officers and Members were at pains to point out that no firm decision had been made in respect of buildings. This to an extent allayed some of the apprehensions of the parents, pupils and staff.

It is important that this aspect of good faith is seen to be put into practice if a positive attitude is to be engendered towards the new school. This positive attitude is at least as important as any of the physical aspects of the process of amalgamation. Were the Brookside building to be retained as an integral part of the new school this would be a positive start to good relationships amongst pupils, parents and staff alike.

2. The experience of those who have operated separated buildings is that this is a set up to be avoided if at all possible. A single building would unite the pupil body in a way that no other solution can. The physical joining of the two buildings will eliminate the "your school", "our school" attitudes. Thus it is in the highest orders of priority that a physical joining take place at the earliest stage in amalgamation.

A single building eliminates bad weather travelling between lessons and this can only be to the advantage to the boys and girls in the new school. This detrimental feature has been part of the history of the school life of the pupils of Bertram Ramsey School for the past seventeen years.

There is no doubt that the educational life of the school has been that much harder. It is not a positive element in anyones educational day.

To don, divest and carry wet clothing around with school books is a feature whose elimination should be seen as being as important to those planning the amalgamation as it is to those who have had to endure it since the last amalgamation on the Prissick Base.

Pupils who enter buildings from inclement conditions several times a day also bring the fabric into a low state of cleanliness much quicker than those who stay indoors for most of their working time. Wet clothing and muddy shoes are not conducive to making decorative order last for very long. However good the cleaning staff are they are allotted to schools on the basis of floor area, and no account is taken of the variation in the use and conditions of the working day.

It would certainly be seen as a retragrade step in conditions of work for Brookside pupils, who have never had to experience outside travelling, to have to do so. It is not the intention of the LEA that the pupils should have poorer provision as a result of a-algaration.

It would seem that the cost factor in joining BRL and Bk will be lower than physical uniting BRU and BRL.

3. It is important to have one staff room and central administration area to achieve maximum unity of ethos in the new school. There has been a reluctance amounting to opposition to the proposals, and this has to be overcome. It is also important that a one-ness of approach is achieved as soon as possible. A division of staff rooms in the new school, even where a mixture of the two "old" schools is arrived at, is still a dividing factor, increases communication difficulties and militates against unity. In moving to a new school we would be aiming at improving conditions in buildings which are over twenty years old. There will be additional features to be built or alterations to be made in the amalgamation. Many of these could be incorporated in the physical joining of the two schools. A concourse between the BRL and Ek as outlined on the map attached could have at the centre of the new school the Staff Room, Administration Area and such whole school features as the Library, Resources Unit and the extra specialist room that may be needed if the present buildings are incapable of adaptation to bring facilities to the present levels in the two existing schools. Bearing in mind that these two schools are already adaptations of previous schools that were built nearly twenty-five years ago, an improved standard that will match those offered on other bases should be aimed for. The pupils in the new school have the right to expect not to have to suffer by being in attendance at school without facilities that are taken for granted at other schools in Middlesbrough. The relative freedom of the use of space has allowed such improvements as specialist A-V rooms to be established. Remedial Suites, Support Unit, Drama Space and Resources Area are other examples which good practice should allow to be carried over to the new school.

4. The uniting of the two pupil bodies is, of course, the central point of the exercise in amalgamation. If the choice of buildings, the physical joining of the schools and the centralising of the staff and other whole school facilities is achieved, then a great deal will have been attained.

The rest relies on the curriculum and the hidden curriculum. A unity of studies should be striven for, whilst at the same time safeguarding the courses already undertaken by the boys and girls of each of the schools. A significant decision is in the Second Foreign Language to be studied by the pupils, but many of the syllabus titles mask completely different contents and approaches. Thus there is a large sized task to discuss and agree on the curriculum for the new school. However, it is in the interests of the children that once the decision has been made, that every effort is made both in terms of buildings and of learning resources, to bring about the reality of the new school as soon as possible. This is certainly the experience of our colleagues in London and other areas that have already undertaken amalgamation. We should use the existing knowledge to the advantage of the youngsters of Middlesbrough.

FOREWORD

Whilst the case for amalgamation may be assumed to be well known, I felt that it would be relevant to gather some of the points together for consideration in light of the fact that counter proposals in writing are being presented to the Committee.

I am Head of Bertram Ramsey School, which is subject to a proposed merger with the nearby Brookside School. I have taught in two large schools and two medium sized schools prior to taking up this appointment and was instrumental, as Head of Department and Head of House in shaping a growing school from some 200 pupils to 900 pupils. Thus the comments in the second part of this paper arise from face to face, practical experience and not from hearsay, theory or media-inspired comment. The subject of schooling does become emotional and can be sensational, therefore I do not intend to submit this document to the media, nor do they have permission to quote from it.

N. Bertram

THE CASE FOR AMALGAMATION

Economic

- a) The saving on building costs is better documented by the County and not disputed by anyone.
- b) The saving on staffing is a medium-term one rather than short-term, but will be made in the following ways:-

- 1 Head rather than 2 (paid at the same salary as the present Head of Bertram Ramsey)
- 1 Deputy rather than 2 (" " " ")
- 1 Senior Mistress rather than 2) (" " ")

Points for the new school would be less in total than for the two separate schools (approx 65 as opposed to 55 + 36). The people who do not gain responsibility posts at the new school should, in the course of time, be appointed to similar positions at other schools. Having staff in schools at salaries above what their post warrants, is demoralising, both to themselves and to other staff who are doing similar jobs on lower salary. Thus it will presumably be the aim of the LEA to achieve a staffing as near to agreed establishment levels as quickly as possible.

The pupil teacher ratio in a large school can be less than in a small school to achieve the same effective teaching, thus saving overall for each pupil in the school. It will presumably be the aim of the Committee to achieve this in five years. The document 2/81 makes it clear that it is only by greatly increasing staffing ratios in smaller schools that the same educational opportunity can be afforded as to pupils in large schools, thus the larger option is cheaper in teaching staff.

- c) In a new school the ancillary and clerical staffing would need to be reviewed, and whereas there are two C2 clerks, there would only be need of one and there would, presumably be a diminution in other clerical and auxiliary personnel over a period. Whilst these savings would not be of the same order as closing a building, they would be significant on a County wide basis.
- d) Equipment can be more economically used, measured per capita. Expensive items may be uneconomic for a small school to contemplate buying for the small number of pupils involved, but could be easily justified when used by a greater number of pupils. Also the capitation sums for a larger school can be economically deployed. Reference books, source books and audio/visual material can be available to a larger number of pupils at the same cost as to a smaller school.

EDUCATIONAL ACADEMIC

The keynote of the academic advantages is flexibility. The merit of the large school is not only that it offers more individual subjects - though that can be a useful side effect - but that it offers greater flexibility of teaching groups.

The smaller school tend to have to have bands which are unitary, i.e. all GCE or all CSE, or, at best offer a limited flexibility for the child. The larger school can have several groups of the same subject taught at the same time and therefore the teaching can be pitched at the right level for the class. Smaller schools cannot do this - because they have fewer teachers, or only one, in many subjects - and therefore have to have mixed ability teaching. This is generally accepted as being less effective as a teaching method unless taught by enthusiasts. These enthusiasts are few and far between.

Block time tabling and having three or more subject teachers available at any one time enables a pupil to get the best out of the subject by being taught at the right level. It does not follow that because someone is good at English and French that they are also good at History and Maths. Also it is true that pupils are sometimes able to attempt only one or two 'O' levels whilst studying most of their subjects at CSE level.

It is also a practical proposition to have specialist provision for teaching equipment. Audio visual rooms with permanently set up projectors and/or videos make using this method of teaching much more practical than moving the equipment around the building. It also lengthens the life of the equipment if it is not moved. The same arguments apply to computer rooms, drama spaces, typing rooms, music rooms, remedial rooms, and so on.

In the larger school, specialist teachers can teach their specialism and use their expertise to the full, whereas in a small school, teachers have to teach subjects at which they are less skilled and for which they are less sympathetic: which gives the child the best deal?

Academically gifted pupils can feel isolated if there are few of them within the school. A group gives identity and a fellow feeling. The larger the group the greater positive approach towards learning there is among its members.

Large schools can equally cater with specialist teachers, rooms and advice for slower learners.

EDUCATIONAL PASTORAL

The large school was responsible for the setting up of systems of care in schools. Whether House of Year is used as the basis for pastoral care it was brought about by the large school - former "Houses" were for sporting and competition.

Men or women are placed in charge of pupils when they reach the school and stay with them throughout their school careers. Tutors have specific tasks placed upon them and are given time with their groups to tackle problems of relationships in school - friendship, bullying, homework, revising, decision-making, etc.

SOCIAL

Whilst there will be a lessening of choice overall by the closing of some schools, there is a strong argument for the retention of school friendships by all the pupils from a Primary school going to the same Secondary School.

At a recent meeting of Home and School Associations at Breckon Hill Primary School, it was said by parents of the Breckon Hill HSA that the team of parents that worked for the school was also broken up when pupils went to different secondary schools. The one school solution to the economic problem could thus be said to have educational, academic, pastoral and wider social advantages in being a focus for all parental interest.

REPLY TO THE STAFF DOCUMENT FROM BROOKSIDE SCHOOL

- 4 Cost savings on staff will increase in the medium term since protection of salaries cannot be envisaged as part of a cost-saving exercise. It is assumed that those holding posts of responsibility will be found equivalent posts in other schools in the fullness of time. It is not feasible for staff to remain in posts at overpaid salaries until they retire.
- 5 Whilst accepting the figures and the document from the DES 2/81 that below four form entry schools are not viable, it is true that extra staffing is also needed for reasonable viability at numbers just above that level. The most economical use of staff is in schools with much greater numbers. Is it necessary to pay two salaries for Head, Deputy, and duplicate Heads of Department, when one can demonstrably do the job?
- Changing of catchment areas as suggested merely pushes off responsibility on to another school area and does not tackle the fundamentals. It is a parochial and not an educational argument.
- 6 As stated in the other documents the large school can, if needed, offer more subjects but more fundamentally, it offers greater flexibility of class within a subject. Just because Johnny or Mary is good at several subjects should not trap him or her in the 'GCE' class when failure at the other subjects looms at the end of the course. Nor should a child be placed in a CSE class for all subjects when she or he is capable of doing one, two or three 'O' levels. It is easy to build in this individuality into the timetable of a large school by block timetabling. Indeed most children can be on an individual timetable to suit their needs and capabilities and not put into a box which contains some of their needs only. The remoteness and less effective aspects are not features of a large school, rather the reverse, using the greater flexibility offered; catering for the needs of each pupil.
- 7.1 Disruption can be minimised by careful planning, again using the resources available to a large school, and there are many staff who experienced the merger of Bertram Ramsey and Brackenhoe on the staff of both of the present schools. The disruption to the education of pupils in a shrinking school can be greater unless this is done by injection of extra staff, which is an expensive alternative.
- 7.2 It is the direct experience of the author of this document who has worked in schools of greater size than the one

planned, that discipline is related to staff and staff attitudes rather than numbers. This is based on real face to face experience and not on conjecture, research or newspaper exaggeration. The only risk lies in the good will of the staff and this is one resource in education which is reliable - if staff work for good discipline it will be good whatever the size of the school.

- 7.3 The House system in Bertram Ramsey was changed to a Year system (one recently adopted by Brookside) when the school was over a thousand and therefore should present no problems to those skilled with dealing with it. The Pastoral system is so effective that several outside agencies, Social Services, Intermediate Treatment and the Adolescent Unit at St Lukes, make placements because of the sensitive and caring attitude. A school which can deal with such problem pupils must surely be able to cater for the gifted and the 'ordinary'. Primary schools advise parents of pupils with problems to opt for Bertram Ramsey because of the high quality of attention paid to such boys and girls.

Each Year Head takes the pupils right through from First to Fifth year and tutors are also in charge of their groups of 25 for five years. There is a great deal of knowledge and care built into this system which can be transferred to larger schools.

At present, Year Heads at Bertram Ramsey are in charge of about 180 pupils, at Brookside the Year Heads are in charge of two year groups, some 240 pupils.

REPLY TO THE PARENTS GROUP DOCUMENT

The documents produced by the Parents Action Group and the staff of Brookside School are interesting but the following points need to be corrected as matters of fact or challenged on assumptions.

- 3.2 There is a large element of conjecture here and current policy on non-redundancy is the only one that can be taken into account.
- 3.4 There are serious matters of error which could have been checked on.
- a) The grouping would not be such as to increase the salary of those currently being paid to Head and Deputies at Bertram Ramsey School.
 - b) There would be pro rata fewer scale salary points available in the proposed school and Heads of Department posts currently at Scales 4 could not be increased as this is the highest Head of Department salary.
 - c) It is presumed that those who do not achieve a comparable post at the proposed school would be appointed to equivalent posts at comparable schools during the course of time, thus bringing the salary bill to an economic level.

The proposals put forward for separate schools would mean paying two Heads, and four Deputy Head salaries and some initially 90 odd scale posts. The amalgamated school would have one Head and two Deputy salaries at a level currently being paid by the Authority and work at about 60 - 65 scale points.

- 3.7 (i) There would be accelerated wastage from one school and minimal from the other since one school would take the fall in rolls from the whole area - the other being protected as it has been for some years. It could be difficult to recruit to a school experiencing accelerated shrinkage.
- (ii) It is difficult to know what is meant by redeployment within the School Base as movement would be one way only.
- (iii) This is the normal situation with reference to an overall fall in numbers.
4. (i) Bertram Ramsey has had very favourable reports from H.M.I. and Local Advisers. Its staff are consulted and involved in Local Management courses as tutors, in DES courses as organisers and originators, and support local curriculum study groups.

- 4 (ii) Many Bertram Ramsey Staff applied to Bertram Ramsey because of its high reputation - including some from Brookside - and because it is a larger school which offered more scope in their subjects. They would not wish to teach in a smaller school, having experienced the advantages of a large one, but would bring their expertise to bear if this were to be the case. Several of Brookside senior staff have done this, having had the experience of teaching at Bertram Ramsey and now being on Brookside staff.
- (iii) There is no factual evidence to support this from available sources. In school allocations some pupils change from Brookside to Bertram Ramsey and vice versa. The flexible curriculum, caring atmosphere and outstanding sporting achievements all play their part in parents wanting their children to come to Bertram Ramsey.
- 4.2 Parental preference would be effectively eliminated if the choice were between schools of identical size and curriculum. One school would have a unifying social effect in the area.
- 5.2 No one would argue for obscurity of subject but this paragraph ignores the greater flexibility that can be offered by a larger school. It is not necessary for a pupil to have to do all CSE or all GCE subjects merely because this fits a rigid timetable. Pupils can be put on a personal timetable so that each subject is taught to the pupil at the right level irrespective of the level at which he or she is studying other subjects. Thus a pupil who is of 'O' level ability in a large school is not "trapped" in the CSE band by the rigid timetable of a small school.
- 5.3 This argues against the individuality of the schools which was previously put forward as a strong point of the small school. It divides staff loyalties, creates 'ethos' problems between one school and another and introduces complications of timetable that would be unnecessary in one school organisation. If staff sharing is going to be part of the planning, then it should be under one organisation, where it can be effectively used.
- 5.5 Staff recruitment to schools larger than four form entry is easier, and the arguments about curriculum enrichment are concerned with depth just as much as with width.
- 6 The question of buildings is one which requires a great deal of thought and planning. There are facilities of value in each of the three buildings

Continued

but whatever solution regarding the future schooling is arrived at, it needs to be in the best interests of the pupils.

The best interests of the pupils will be served if one large school is set up, using the best from the existing provision of human and material resources, rather than having one school and its pupils take the strain and stresses of shrinking into the nineties. The comparison with industry has been mentioned and to carry it further it would not be advisable to strip the assets from one school when together the two schools could face a vigorous and lively academic future.

APPENDIX 3

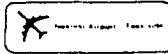
Cleveland's Procedure for Amalgamation

County of Cleveland



Your Ref

Our Ref: 71/3550/W/82



Please reply to:
County Education Officer
Education Offices
Woodlands Road,
Middlesbrough, Cleveland TS1 3BN
When telephoning please ask for
Mr. Copley
Tel: (0642) 248155 Ext. 2958

26th November, 1982

Dear Sir/Madam,

Amalgamation of Bertram Ramsey and Brookside Comprehensive Schools

The Secretary of State for Education and Science has approved the Authority's proposals to amalgamate these two secondary schools and to establish a new 11-16 comprehensive school from the beginning of the 1983/84 school year in September, 1983, in the premises of the two existing schools on the Prissick Base, Marton Road, Middlesbrough.

From September, 1983, the three separate buildings now occupied by Bertram Ramsey School and Brookside School will still be used to accommodate pupils on the roll of the new school. As pupil numbers fall, it is intended to take one of these buildings out of use for secondary school teaching purposes from a date to be determined. The decision as to which building will be taken out of use will be based on educational and financial considerations with the object of retaining the best provision available for the pupils attending the new school.

Pupils now on the rolls of Bertram Ramsey School and Brookside School will continue their education at the new school until they leave. As far as practicable, it is expected that pupils already in attendance at these two schools will be taught in the existing buildings, and every effort will be made to minimise disruption and to maintain the continuity of pupils' education. The Education Committee has decided that from September, 1983, the admission of 11+ pupils to the new school will be in accordance with existing zoning arrangements. This decision is of particular interest to the parents of pupils who will be 11+ years of age from the beginning of the 1983/84 school year onwards.

Accordingly from September, 1983, pupils resident in the following primary school admission zones will be offered places at the new 11-16 school on Prissick Base:-

Abingdon Junior (except for pupils resident in the admission zone of the former Victoria Road Primary School who will be offered places at the Acklam Base Schools).

/contd...

To all members of teaching and non-teaching staff employed at Bertram Ramsey and Brookside Schools.

- 2 -

26th November, 1982

Breckon Hill Primary

Captain Cook Junior

(with the exception of pupils resident within the area surrounded by and including Cypress Road, together with Cedar Road, Cloverwood Close and Pinewood Road, who will be offered places at Nunthorpe 11-16 School)

Easterside Primary

Lingfield Primary

Marton Grove Junior

Marton Manor Primary

Early in 1983 the Education Committee will appoint a Head Teacher Designate for the school, and subsequently the Head Teacher will arrange a parents' meeting to give further information and answer questions about the new school.

If you have any queries on the contents of this circular letter, I should be grateful if you would either write to the Education Offices (Secondary Education Division), or telephone the appropriate officers (Mr. J.C. Copley, extension 2958, or Mr. W.R. Emmerson, extension 2933).

Yours sincerely,

County Education Officer.

STAFF INFORMATION

- a) It was agreed that it was in the best interest of the pupils that co-operation between Staff at all levels should be full and open as possible.
- b) The establishment of both schools to be exchanged.
- c) Future meetings to be arranged for exchange of information.
- d) Clarification with regard to curriculum forecast to be ascertained from Senior Adviser responsible.
- e) Staffing procedure to be requested.
- f) Specific proposals regarding curriculum and organisation must await the appointment of the new Head.

The Staffing procedure document has now been obtained and is published attached, for Staff to see. The new Head will be appointed mid-January, other queries and answers where possible.

- 1. Staff will be able to apply initially for equivalent posts on the new establishment i.e. equivalent meaning equivalent in status and not necessarily in points. e.g. a Scale III Head of Department can apply for the Head of Dept. post Scale IV in the new school.
- 2. The terms Temporary and Acting have still to be clarified by the Authority.

CLEVELAND EDUCATION COMMITTEE

NEW "BROOKSIDE/BERTRAM RAMSEY" SCHOOL

STAFFING STRUCTURE - APPOINTMENT OF TEACHING STAFF

In accordance with the procedure adopted by the Education Committee for making appointments to posts in this new school, which is to be established in September, 1983, teachers currently holding substantive appointments on the staff of Brookside School and Bertram Ramsey School will be given the first opportunity of applying for these posts.

The proposed staffing structure for posts at Scale 2 and above is set out below, together with a brief description of the main responsibilities attaching to each post. However, it may be necessary to make some adjustments to this structure as the overall pattern for each scale develops with the appointment of staff to senior posts.

	<u>Scale</u>	
Senior Teacher - to be appointed from among staff appointed as Heads of Faculty		Responsibility for co-ordinating the work of the heads of faculty.
<u>Communications Faculty</u>		
Head of Faculty (either the head of the English department or the head of the Modern Languages department will be appointed to the post - an additional scale point will be allocated to the subject department of the head of faculty in the first instance.)		See separate sheet
English	4	
Modern Languages	4	
Computer Applications	3	To co-ordinate the study and use of computers.
Remedial Education	3	To initiate and co-ordinate remedial study across the curriculum.
Library and Resources	3	To co-ordinate and disseminate use of library and resources.
Drama	2	To stimulate and sustain drama across the curriculum.
English	2	To support the Head of English in aspects of the curriculum.
Modern Languages	2	To support the Head of Modern Languages in aspects of the curriculum
<u>Counselling and Support Studies Faculty</u>		
Head of Faculty	4	
Head of Year 5	3	
4	3	
3	3	
2	3	
1	3	
Counsellor/Vocational Guidance	3	To provide a system of personal counsel and vocational guidance in the school.

	<u>Scale</u>	
<u>Human Studies</u>		
Head of Faculty	4	
Society Studies	3	
Physical Education	3	
R.E. and Humanities	3	
History	2	To develop the historical aspects of the faculty.
Geography	2	To develop the geographical aspects of the faculty.
Physical Education	2	To assist the Head of P.E. in specific aspects of the subject.
Humanities	2	To assist the Head of R.E./Humanities in specific aspects of these subjects.
Environmental Studies	2	To develop combined studies of the History/Geography departments across the age ranges.
Commerce/Economics	2	
<u>Mathematics and Science Studies</u>		
Head of Faculty (either the head of the Mathematics department or the head of the Science department will be appointed to the post - an additional scale point will be allocated to the subject department of the head of the faculty in the first instance.)		
Science	4	
Mathematics	4	
Biology)2 from 3	} 3	
Chemistry)depending on the		
Physics)subject specialisation of the head of Science		
Mathematics	2	To assist the head of department in specific aspects of Mathematics.
Mathematics	2	To assist the head of department in specific aspects of Mathematics.
Combined Science	2	To develop combined studies of Science
Applied Science	2	To develop aspects of industrial and applied science.

	<u>Scale</u>	
<u>Mathematics and Science Faculty - continued</u>		
Human Science	2	To develop aspects of Human Science.
Special Projects	2	To develop aspects of Science and Mathematics with special reference to slower learners, under the direction of the Head of Faculty and in consultation with the Head of Remedial Studies
<u>Creative Studies</u>		
Head of Faculty	4	
Craft, Design and Technology	3	
Home Economics	3	
Music	3	
Art	3	
Family Studies	2	To develop family studies within the Home Economics syllabus.
Graphic Design	2	To develop graphic aspects of the faculty.
Two or Three Dimensional Studies	2	To develop 2 or 3 dimensional studies as required in the context of the faculty.

Staffing establishment for September, 1983: 82.5

Head of Faculty

There is a great span of responsibility to be assumed by the person appointed to this position. There will be both vertical and horizontal aspects, co-ordinating within the faculty and across all faculties.

There will be conceptual and philosophical aspects of the curriculum assumed within the remit of the head of faculty under the headings of Spiritual, Ethical, Moral, Scientific, Mathematical, Physical, Aesthetic and Creative, each of which will have its part to play, but with varying emphases according to the faculty. They must never be lost sight of and allowed to play a subservient role to the administrative tasks.

Heads of Faculty will, as part of professional training and as a means of gaining insight into wider functions of school management, be allocated such functions as Examinations Officer, Industry Officer, Buildings Officer, Primary Liaison, Parent Liaison, etc., perhaps on a rotating basis.

Communications Faculty

To co-ordinate Language in all its facets across the curriculum.

Counselling and Support Studies

To construct a positive approach to care and counselling; to support tutors in a co-ordinated approach to social and life skills; with other heads of faculty to co-ordinate study skills across the whole curriculum.

Human Studies

To co-ordinate and where appropriate integrate the study of human affairs. To stimulate an outward-looking study pattern of field-work, community work, etc.

Mathematics and Science Studies

To co-ordinate and where appropriate integrate the study of science and mathematics studies; to promote links with science-based industry and to emphasise the status of science and mathematics.

Creative Studies

To foster the status of creative and personal practical studies and to co-ordinate work in this area; to create an atmosphere in the school where this will thrive.

REORGANISATION OF SECONDARY SCHOOLS - PROCEDURE FOR THE APPOINTMENT OF TEACHING STAFF TO NEW COUNTY SCHOOLS IN MIDDLESBROUGH.

1. INTRODUCTION

1.1 The Education Committee has been reviewing the provision for secondary education within the County in the light of the steady fall in the number of children in the statutory age range which will continue until the beginning of the 1990's, as well as the present and future requirements of the 16-19 age group.

1.2 Each area of the county is being reviewed separately and reports have been or will be presented to the Committee for consideration as and when appropriate.

1.3 Middlesbrough was the second area to be reviewed and the Education Committee decided that the situation should be dealt with by closing six 11-16 secondary schools and establishing three new 11-16 secondary schools in their place. The six schools affected are Southlands School and Springfield School on the Middle Beck Base, Bertram Ramsey School and Brookside School on the Prissick Base and Stainsby School and Oakland School on the Stainsby Base. The effect of the proposals is to establish single new schools in place of the named pair of schools on each Base.

2. TEACHING STAFF

2.1 General

2.1.1 The establishment of the three new schools will involve new appointments and it is expected that some redeployment of teaching staff may be necessary.

2.1.2 Whilst all teaching posts in schools established as a result of the closure of existing schools should be regarded as new posts, the Authority will place all existing staff in as near equivalent posts as practicable and will bear in mind the expressed wishes of teachers wherever possible and the need to have the minimum of interruption in the education of pupils. The salaries of all existing teachers will be safeguarded in accordance with the terms of the Burnham Report.

2.1.3 If there is only one applicant for any post, the Appointing Committee may decide to dispense with the formal arrangements for interview.

2.1.4 The composition of the Appointing Committee shall be as determined by the Education Committee.

2.2 Head Teachers

2.2.1 The head teachers of the new schools will be appointed and/or designated as soon as is practicable so that they can take part in the appointment of their staff.

2.2.2 The head teachers of each pair of schools will be given the first opportunity of applying for the head teacher post in the new school. They will receive a letter enclosing details of the school to be formed by that particular amalgamation and they will be asked to reply signifying whether they wish to be considered for the headship of that particular school.

2.2.3 1) Subject to 2.1.3 above, the Committee will then interview those interested and designate head teachers of the new schools. If, exceptionally, the Committee is unable to offer a headship to an existing head teacher, then he will be informed as soon as possible that he has not been designated.

2) Where an existing head teacher has not been offered a headship in one of the new schools, the Authority will use its best endeavours to find a suitable alternative headship where the head teacher concerned wishes to remain in the service of the Authority. This will involve prior discussion of the alternative possibilities with a senior education officer of the Authority, and the waiving by the Authority of the normal procedures for the appointment of head teacher. In such circumstances the Governors of the school have the right to make representation to the Education Committee. Arrangements will be made for the Chairman of Governors of the receiving school to meet the displaced head teacher prior to the appropriate meeting of the Governors. If, at the time of closure, there is no suitable headship vacancy, the Authority will, following discussion with a senior education officer of the Authority, offer a suitable alternative post; subsequently, when the next suitable headship falls vacant, the displaced head teacher will be given prior consideration for the posts. Due regard will be given to the personal and professional circumstances of individual head teachers, including their career development, travelling and any previous transfers. If there are particular difficulties, the displaced head teacher, together with a friend if he or she so wishes, will be accorded a further interview with the County Education Officer in an endeavour to resolve the problem.

3) Any head teacher post remaining vacant after all existing head teachers have accepted posts may in the first instance be advertised within the County. Any posts subsequently remaining vacant may be advertised nationally following consultation with the recognised teachers' associations.

2.3 Deputy Head Teachers, Second Masters/Mistresses

2.3.1 These appointments will be dealt with in the same way as for headships and the whole of the provisions of 2.2 above will apply similarly as for head teachers.

2.3.2 These appointments will take place at a somewhat later date than headships so that the head teachers can be consulted about appointments.

2.3.3 Any deputy head teacher (or equivalent) posts vacant after all existing deputy head teachers (or equivalent) have accepted posts, may in the first instance be advertised within the County. Any posts subsequently remaining vacant may be advertised nationally following consultation with the recognised teachers' associations.

3. OTHER TEACHING POSTS

3.1 The procedure for making appointments of senior teachers, heads of department, other posts of responsibility at a level above Scale 1 and Scale 1 posts will commence with the issue of a document for each school before the appointment procedure begins. The statement will set out the posts which should be available with an indication of the particular responsibilities that will be attached to each post on Scale 2 to senior teacher inclusive. There will also be an indication of the total number of staff who will be required at the school although initially this must be regarded as an estimate.

3.2 Teachers in the existing schools will be given the first opportunity of applying for posts in the new school(s) to be established in place of the school(s) in which they teach.

3.3 It is hoped that these procedures could begin up to a year before the date of establishment of the new schools and that appointments could be settled at least one term before that date, and for the more senior posts of responsibility considerably longer than that.

3.4 The head teachers of the schools concerned will make arrangements to provide information for the staff of each existing school and will also discuss matters with individual members of the staff if required. If any member of staff wishes to have a discussion with the appropriate adviser, this can be arranged.

3.5 The arrangements for dealing with interviews and appointments for each school will be made in accordance with the following procedures:-

- i) Teachers to apply for one scale only at a time by way of application listing posts at that scale for which they wish to be considered, plus a personal data form. Staff may, if they wish, attach a covering statement about the posts for which they have applied.
- ii) Short-listing, interviews and appointments will be dealt with by the interviewing body.
- iii) Where they have not already been interviewed for posts at a higher level, interviews will be arranged if necessary for staff at their existing level.
- iv) If there is only one applicant for any post, the Appointing Committee may decide to dispense with the formal arrangements for interview.
- v) Should the Appointing Committee consider that another interview is desirable in order to obtain further information relative to the candidate's application for a particular post, this will be arranged.
- vi) Should any staff not be designated, they will receive a formal alternative offer of a post. In making alternative offers, the Education Committee will place such staff in as near equivalent posts as practicable and will bear in mind the expressed wishes of the teachers concerned. Due regard will be given to the personal and professional circumstances of individual teachers, including their career development, travelling and any previous transfers. Head teachers of schools with vacancies will be expected to give prior consideration for appointment to any suitable teacher(s) willing to transfer including those teachers who have not been designated as a result of reorganisation of schools.

3.6 When offers are made following the interviews, acceptance of a post offered does not preclude the candidates from subsequently applying for other posts at the same or higher level which may become available later.

3.7 Any posts at Senior Teacher level or below remaining vacant after existing staff at each level have accepted posts may in the first instance be advertised within the County and, if necessary, nationally.

4.

CODE OF PRACTICE FOR THE REDEPLOYMENT OF TEACHERS IN COUNTY AND CONTROLLED SCHOOLS

4.1 The provisions of this code as set out in paragraph 4 in relating to school closures and amalgamations apply except in so far as the Committee decide to vary their normal arrangements in regard to the appointment of staff (see paragraph 3.1.3 above).

5.

APPEALS

5.1 Where teachers feel that the part they are asked to play in the new schools is unacceptable, they will have the right to appeal to a specially constituted Assessment Committee established by the Education Committee. Any teacher in this position would have the right to put his case to the Assessment Committee if necessary accompanied by a friend.

APPENDIX 4

The Curriculum Analyses of
Brookside, Bertram Ramsey and Brackenhoe Schools

CURRICULUM ANALYSIS

T.I. Davies (1969) and I.B. Butterworth (1975) pioneered procedures of curriculum analysis. The formulae they devised are useful to cost the effects of:

1. Changing your curriculum - innovation, expansion, contraction etc.
2. Changed pupil intake (e.g. falling rolls).
3. You move to a new school and desire a quick and reliable analysis of staff deployment.
4. You wish to express staff deployment, pupil contact, extent of curricula flexibility etc. in quantifiable terms which allow you to compare your school with other schools throughout Britain.

N.B. The procedures of curriculum analysis make no value judgements they simply show how staff are currently deployed. Professional decisions as to what ought to be the desired deployment still rest with the school and its policy for the curriculum.

NOTATION: CURRICULUM SYMBOLS

N = Number of pupils)	
T = Number of staff)	Determined by L.E.A.
n = Number of teaching spaces)	
C = Contact ratio)	
r = Rooming fraction)	Determined by School
x = Number of curriculum units)	
β = Relative bonus)	

YEAR GROUP	NUMBER YEAR-GROUP	NUMBER OF GROUPS	MATHS	E2L	ENGLISH	LIBRARY ENG. LIT.	HISTORY	GEOGRAPHY	REL. ED.	DRAMA	PHYS. ED.	MUSIC	ART	HOME E ECONOMICS CRAFT/ TECH.	SCIENCE	PHYS. & LANGS.	CLASSICS	COMPUT	CAREERS	TUTORIAL/ SOC. ED. COMPUTER STUDIES	
1	120		5 (25)		5 (25)	1 (4)	3 (12)	3 (12)	2 (8)	2 (8)	3 (12)	2 (8)	3 (12)	2 (8)	2 (8)	4 (16)	5 (20)				
* E2L	(34)	(4)		(53 132)							(3 12)		(2 4)	(2 6)	(2 4)						
2			5 (25)		5 (25)		3 (12)	3 (12)	2 (8)	2 (4)	3 (6)	1 (2)	3 (12)	3 (9)	3 (9)	4 (16)	4 (24)				
										4 (8)	2 (4)										
3			5 (25)		4 (12)		3 (12)	3 (12)	1 (2)		3 (6)	2 (4)	2 (4)	2 (10)	2 (10)	6 (18)	4 (24)				
					6 (12)				2 (4)	4 (8)		3 (6)	2 (8)	2 (8)	4 (4)						
4			6 (30)		5 (5)	4 (8)	4 (16)	4 (12)	1 (4)		3 (12)		4 (16)	4 (20)	4 (28)	4 (32)	5 (5)	4 (12)	1 (4)	4 (12)	
					6 (18)			5 (2)									4 (8)				
5			6 (30)		5 (5)	4 (8)	4 (12)	4 (12)	4 (8)		3 (12)		4 (16)	4 (24)	4 (32)	4 (32)	5 (5)	4 (12)	1 (4)	4 (8)	
					6 (18)			5 (2)									4 (4)				
Total of periods for each subject			135	132	120	20	64	60	38	12	76	18	70	85	99	118	90	24	8	20	

* E2L Dept : for ethnic minority group.

O denotes teacher periods.

To show breakdown of curriculum offered to each year group/teaching periods for each subject.

Table 1: Brookside school

Working sheet 2
BASIC + OPTIONS

Form No. Basic Subjects

Option Pools

	B/G	E	F	M	Pe	Fp	Ca	A	B	C	D	E	As
AD	16/15	E ₅	F ₅	M	Pe	Ga	Re	G x Link	C B x	B CST x	C x ELT x	At CST	x 'O' level courses or mixed O/CSE Rest CSE only.
4R	12/20	E ₆	HK + HK Wwk + Mwk	M	Pe	Ga	Ca	TS x TP A ₁ x HK x	ED x Hist	F Hist x	P TP	P x B G	
4W	10/20	E ₆		M	Pe	Ga	Re			Nwk			
4Y	9/10	E ₆	S ₄ A ₄	M	Pe	Ga	Ca	TS/HK	ED/TP	RE/Hist	E.Lit G		
5D	15/17	E ₅	F ₅	M	Pe	Ga	Re	Art x ED x Link	G x B x	Art CST x	C x Nwk	B x P x	
5R	16/16	E ₆	HK + HK Wwk/Mwk/Ed	M	Pe	Ga	Ca	ELT x	P	Hist x	Re	C	
5W	14/15	E ₆		M	Pe	Ga	Re	TP TS x HK x	TP	G Re x	E.Lit Hist	B	
5Y	10/10	E ₆	G ₄ S ₄ A ₄	M	Pe	Ga	Ca	TS/HK	ED/TP	Art Nwk			

Periods per subject per week (Total:)

Working sheet I
GENERAL CURRICULUM

Form No.	Humanities				Foreign languages		Mathematics Sciences				Creative and practical subjects				Physical and leisure activities		Guidance and services				
	E	H	G	Re	F	Gm	M	S	P	C	B	Mu	A	Td	Mk	Wk	Hk	Pe		Fp	Ca
1D	E ₅	Li ₂	Dr ₂	H ₃	G ₃	Re ₂	F ₅	M	S ₄			Mu ₂	A ₃				Wwk Nwk Hk	Pe	Ca		40
1R	E ₅	Li ₂	Dr ₂	H ₃	G ₃	Re ₂	F ₅	M	S ₄			Mu ₂	A ₃				Wwk Nwk	Pe	Ca	2	40
1W	E ₅	Li ₂	Dr ₂	H ₃	G ₃	Re ₂	F ₅	M	S ₄			Mu ₂	A ₃				Wwk Nwk Hk	Pe	Ca		40
1Y	E ₅	Li ₂	Dr ₂	H ₃	G ₃	Re ₂	F ₅	M ₅	S ₄			Mu ₂	A ₃				Wwk Hk Nwk	Pe	Ca	2	40
2D	E ₅		H ₃	G ₃	Re ₂	F ₄	Gm ₄	M	S ₄			Mu ₁	A ₃				Wwk Nwk Hk Mwk	Pe	Ca		40
2R	E ₅		H ₃	G ₃	Re ₂	F ₄	Gm ₄	M	S ₄			Mu ₁	A ₃				Wwk Hk Mwk	Pe	Ca	2	40
2W	E ₅	Dr ₂	H ₃	G ₃	Re ₂	F ₄		M	S ₄			Mu ₂	A ₃				Hk Td	Pe	Ca		40
2Y	E ₅	Dr ₂	H ₃	G ₃	Re ₂	F ₄		M ₅	S ₄			Mu ₂	A ₃				Hk Td	Pe	Ca	2	40
3D	E ₄		H ₃	G ₃	Re ₁	F ₄	Gm ₄	M		P ₂	C ₂	B ₂	Mu ₁	A ₂			Hk Hk	Pe	Ca		40
3R	E ₄		H ₃	G ₃	Re ₁	F ₄	Gm ₄	M		P ₂	C ₂	B ₂	Mu ₁	A ₂			Wwk Mwk	Pe	Ca	2	40
3W	E ₄		H ₃	G ₃	Re ₂	F ₄		M		P ₂	C ₂	B ₂	Mu ₂	A ₃			Td Nwk	Pe	Ca		40
3Y	E ₄		H ₃	G ₃	Re ₂	F ₄		M ₅	S ₄			Mu ₂	A ₃				Nwk	Pe	Ca	2	40

To show the breakdown of curriculum offered to each year group.

Curriculum Starting Analysis		Curriculum for Supt. 1985 ¹ stab. (Nos. of Teachers) ..7:1:3.. (actual)													Timetable Cycle10..... days		Length				
BRACKENHOE		H.T. MRS. BERTRAM, Franchise Roll Sept. 19851143													Periods per cycle		50				
Year Group	Number of Classes	A	B	C	D	E	F	G	H	J	K	L	M	N	O	P	Q	R	S	T	
		Maths	Science	English	History	Geography	Rel. Ed.	Drama	P.E.	Music	Art	H.C.	Craft/Tech.	Science	Mod. Langs.	Classics	Co-ord.	Foreign	Comp. Studies	Other	
1	8	6 36	18 36	6 36		4 32	4 32	2 16		3 24	2 16	3 24	2 16	3 24	6 48	6 36					2 16
		149	34	149												149					
2	9	6 42	18 36	6 42		4 36	4 36	2 18		3 27	2 18	3 27	3 27	3 27	6 54	6 42					2 18
		182	33	182												182					
3	10	6 60		6 54		4 40	4 32	2 16		3 24	2 16	3 30	3 27	3 27	6 60	6 42					2 20
				5 5			7 14	3 6		4 8			2 12	2 2		5 10					
4	12	6 72		6 72		5 20	5 30	6 24	5 5	3 36		6 24	5 25	5 35	6 66	6 18		5 15		5 15	2 22
				5 5			6 6	5 5		6 18		5 20	6 30	6 12	5 10	5 10		6 6			
5	12	6 72		6 72		6 30	6 36	6 6		3 36		5 25	6 18	5 35	5 55	6 12		5 10		6 12	2 22
							5 10	6 18		6 12		6 12	5 20	6 36		5 15		6 24			
					109	195	94		29		146	176	130	352	87		122		49		
		8 276	2 72	8 286		4 158	7 196	2 109	1 5	6 182	2 50	4 511	5 73	5 198	3 293	5 1185		3 55		1 27	

Table 3 : Brackenhoe

SCHOOL CURRICULUM
(COSMOS or Sheffield Notation)

FIRST YEAR

1.1	1P	E	M	Sc	G	H	FR	A	MU	RE	PE	S.Ed	} Wk. Mk. Graph He. Nwk
1.2	1E	E ₆	M ₆	Sc ₆	G ₄	H ₄	FR ₆	A	MU	RE	PE	S.Ed	
1.3	1R	E	M	Sc	G	H	FR	A	MU	RE	PE	SEA	
1.4	1S	E ₆	M ₆	Sc ₆	G ₄	H ₄	FR ₆	A ₃	MU	RE	PE	SEA	
1.5	1O	E	M	Sc	G	H	FR	A	MU	RE	PE	SEA	
1.6	1N	E ₆	M ₆	Sc ₆	G ₄	H ₄	FR ₆	A ₃	MU	RE	PE	SEA	
1.7	1A	E	M	Sc	G	H	FR	A	MU	RE	PE	SEA	
1.8	1L	E+M ₁₈ E+M ₁₈		Sc ₆	G ₄ G ₄	H ₄ H ₄	-	A ₃	MU ₂	RE ₂	PE ₃	SEA ₂	

SECOND YEAR

2.1	2P	E	M	Sc	G	H	FR	MU	RE	PE	S.Ed	} A. Wk. Mk. Graph He. Nwk
2.2	2E	E	M	Sc	G	H	FR	MU	RE	PE	S.Ed	
2.3	2R	E	M	Sc	G	H	FR	MU	RE	PE	S.Ed	
2.4	2S	E	M	Sc	G	H	FR	MU	RE	PE	S.Ed	
2.5	2O	E ₆	M ₆	Sc ₆	G ₄	H ₄	FR ₆	MU	RE	PE ₃	S.Ed	
2.6	2U	E	M	Sc	G	H	FR	MU	RE	PE	S.Ed	
2.7	2A	E ₆	M ₆	Sc ₆	G ₄	H ₄	FR ₆	MU	RE	PE ₃	S.Ed	
2.8	2L	E+M ₁₈		Sc	G ₄	H ₄	-	MU	RE	PE ₃	S.Ed	
2.9	2I	E+M ₁₈		Sc ₆	G ₄	H ₄	-	MU ₂	RE ₂	PE ₃	SEA ₂	

THIRD YEAR

3.1	3P	E	M	Sc	G	H	FR	MU ₁	RE	PE	Sps	S.Ed	} A. Wk. Mk. Graph He. Nwk
3.2	3E	E ₆	M ₆	Sc ₆	G ₄	H ₄	FR ₆	MU ₂	RE	PE	S.Ed		
3.3	3R	E	M	Sc	G	H	FR	MU ₂	RE	PE	S.Ed		
3.4	3S	E	M	Sc	G	H	FR	MU ₂	RE	PE	S.Ed		
3.5	3O	E ₆	M ₆	Sc ₆	G ₄	H ₄	FR ₆	MU ₂	RE	PE ₅	S.Ed		
3.6	3N	E	M	Sc	G	H	FR	MU ₂	RE	PE	S.Ed		
3.7	3A	E	M	Sc	G	H	FR	MU ₂	RE	PE	S.Ed		
3.8	3L	E	M	Sc	G	H	FR	MU ₂	RE	PE ₃	S.Ed		
3.9	3I	E	M	Sc	G ₄	H ₄	-	MU ₁	RE ₂	PE ₃	S.Ed		
3.10	3T	E ₆	M ₆	Sc ₆	G ₄	H ₄	-	MU ₃	RE ₃	PE ₄	EVS ₃ S.Ed ₂	} 9	

FOURTH YEAR

4.1		E	M	PE	S.Ed	FR	CS+	C	P	TVEI	TVEI	
4.2		E	M	PE	S.Ed	FR	CS+	C	P	Des	Des	o/p
4.3		E	M	PE	S.Ed	FR	G	Typ	B	Tech	Tech	o/p
4.4		E	M	PE	S.Ed	Typ	G	TSP	B	Tech	Tech	
4.5		E	M	PE	S.Ed	Typ	G	SP	B	C/D	C/D	
4.6		E ₆	M ₆	PE ₃	S.Ed	A/c	Unw	EVS	B	C/D	C/D	
4.7		E	M	PE	S.Ed	TD	Dr	EVS	B	HE	HE	
4.8		E	M	PE	S.Ed	Ge	EL	EVS	C	HE	HE	
4.9		E	M	PE	S.Ed	Hum	RE	H	C	NK	NK	
4.9		E	M	PE	S.Ed	Hum	A	H	GSc	CS+	A	
4.10		E	M	PE	S.Ed	Hum	A	H	GSc	Com	A	
4.11		E ₆	M ₆	PE ₃	S.Ed	Hum	A	TVEI	GSc	H	Typ	6

FIFTH YEAR

5.1		E	M	PE	S.Ed	FR	G	C	P	D+T	Des	TVEI
5.2		E	M	PE	S.Ed	FR	G	C	P	D+T	Tech	
5.3		E	M	PE	S.Ed	FR	G	Typ	P	C/D	Tech	
5.4		E	M	PE	S.Ed	TD	G	A	B	C/D	Tech	
5.5		E	M	PE	S.Ed	TD	Hum	A	B	HE	HE	
5.6		E	M	PE	S.Ed	A	Hum	TD	HO	NK	HE	
5.7		E ₆	M ₆	PE ₃	S.Ed	A	Hum	TD	HO	Ge	C/D	
5.8		E	M	PE	S.Ed	A	A/c	RE	C	G	NK	
5.9		E	M	PE	S.Ed	B	A/c	H	C	CS+	NK	
5.10		E	M	PE	S.Ed	EVS	SP	H	C	CS+	A	
5.11		E	M	PE	S.Ed	EVS	EVS	D	H	GSc	Comm.	6

Table 4.

EDUCATION COMMITTEE

REVENUE BUDGET 1983-84

SUMMARY OF NET EXPENDITURE

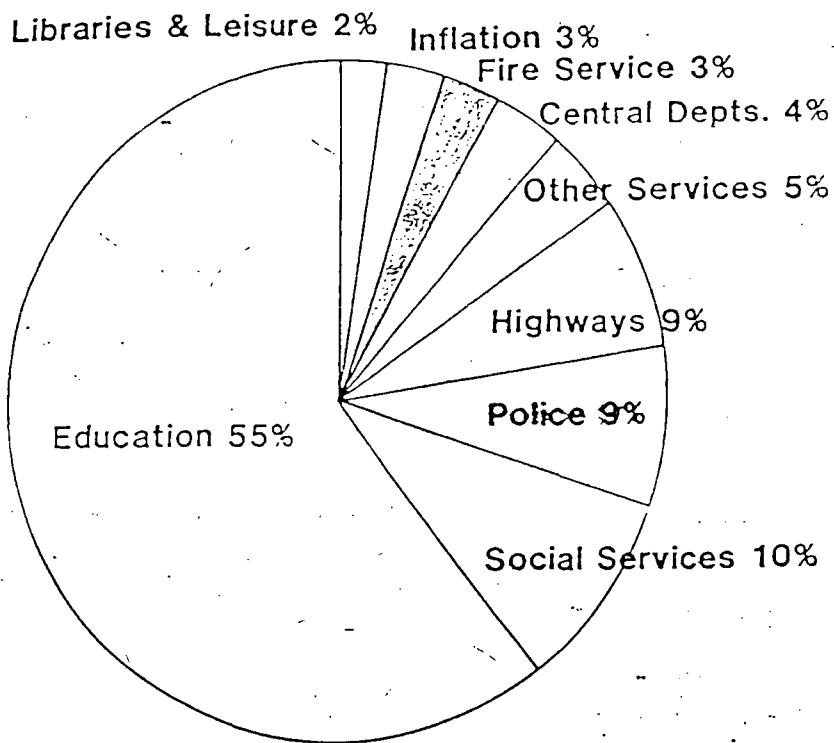
(Incorporating a Reduction of 12 on Original Budget)

Page		£	£
3	Administration		3,446,190
5	Nursery Education - detached Nursery Schools		196,020
8	Primary Education (including nursery classes in Infant Schools)		35,883,540
9	Secondary Education		48,525,840
19	Special Education		6,927,030
22	Higher Education - Teesside Polytechnic		11,280,620
27	Further Education - F/E Colleges		12,406,600
29	F/E Centres		623,700
30	In-Service Training of Teachers		908,820
36	County Psychological Service		462,330
39	Provision of Meals Service		7,708,140
40	Facilities for Recreation, Social and Physical Training		2,357,190
47	Assistance to Students		2,163,150
49	Education provided otherwise than at School		435,600
51	Kirklevington Detention Centre		-
53	Careers Service		724,680
54	Employment Initiatives		234,960
54	Youth Training Scheme		341,550
			<u>134,625,960</u>
	Expenditure not included above -		
	Debt Charges (other than Polytechnic and Colleges)		9,178,500
	Pooling - contribution		10,097,000
55	* Non-recurring expenditure		587,330 *
	Higher and Further Education - Extra District Students - Payments to other L.E.A.'s		699,000
			<u>155,187,790</u>
	DEDUCT - Income not included above -		
	Pooling - reimbursement	11,267,000	
	Higher and Further Education - Extra District Students - Receipts from other L.E.A.'s	784,000	12,051,000
			<u>12,051,000</u>
	TOTAL		<u>£143,136,790</u>

* this includes building / refurbishment etc.

1985/86

EXPENDITURE



APPENDIX 5

Other LEAs

1282

DURHAM COUNTY EDUCATION COMMITTEE

Procedure for the Re-Deployment of Teachers

Primary, Secondary (Comprehensive) and Special Schools

Report of Director

nated Transfers

If, after careful consideration, it appears that it will not be possible to achieve a revised teaching staff establishment at a school by resignation or voluntary transfer, the Authority in consultation with the Head may need to designate one or more teachers who will need to move from the school. Any teacher who has previously volunteered for a specific post will not be automatically regarded as a target for compulsory transfer to any other post.

In designating a teacher who is to transfer to another school, account will be taken of:-

- a) The need to avoid arbitrary decisions.
- b) The position of probationer teachers; such teachers will normally not be moved during their probationary year except at their request.
- c) The need to maintain a balance in the teaching staff at both schools.
- d) The particular circumstances of individual teachers, including experience in the sector concerned, career development, family commitments, ease of travel to alternative schools, accommodation of teacher in relation to the post held, and whether they have undertaken any previous transfer.
- e) The need to take account of the views of the Head Teachers of both schools concerned, and in particular the right of the Head Teacher of the receiving school to object to a proposed appointment if there are adequate grounds.

A Senior Officer will interview teachers in the overstarred school or Department and seek to obtain the agreement of a member of staff to his/her redeployment on a voluntary basis, giving at least 5 days notice of the interview. Teachers are advised, at this stage, to seek the advice of their Professional Association since, if there is still no volunteer, the officer will discuss the situation further with the staff concerned, with the aim of identifying which of those staff it is most appropriate to designate for transfer and to what vacancy.

After discussions have taken place with the teachers concerned the Senior Officer will identify which of the teachers it is proposed to transfer, and the vacancy to which the transfer will be made. This will be confirmed in writing to the teacher concerned giving reasons for the decision. Teachers will during the discussions be given every opportunity to express their preference for any of the available posts.

The conditions laid down in Section 4.3 (a) to (f) in connection with voluntary transfers will also apply to designated transfers.

The Authority will make every effort to offer a designated teacher a permanent appointment or secondment to a specific post at a named school. If no suitable vacancy arises, however, the teacher may be asked to take up temporary duty in an 'unattached' capacity filling casual vacancies where these arise, as an alternative to remaining in his/her former school in a supernumerary position. Any teacher who takes up duties in an 'unattached' capacity will receive a salary safeguard as described in paragraph 7.1, or will be awarded a temporary Scale 2 allowance if his/her former post is at Scale 1 level. Travelling expenses would also be paid at the appropriate rate. Every effort would be made to offer a permanent post to such a teacher, as soon as possible and within one year of the commencement of the 'unattached' duties.

A designated teacher will be advised of his/her rights under the grievance procedure if he/she feels that his/her selection for redeployment is unreasonable and not in accordance with the terms of this document. Copies of the conciliation procedure for individual grievances are available in all schools.

DURHAM COUNTY COUNCIL

EDUCATION DEPARTMENT

FALLING ROLLS IN SECONDARY SCHOOLS

REPORT OF DIRECTOR

1. Members are well aware of the falling rolls which have affected primary schools for some years. This reduction in the school population is now beginning to be felt in secondary schools. I feel that the Committee will wish to know precisely what is happening and what effects this will have during the following decade.

2. SOME COMPARISONS

All figures given in this Report, except where indicated, are main school pupils only.

A simple indicator of what is happening is the change in the total numbers of secondary pupils in county, voluntary controlled and voluntary aided schools since 1974 when the new County Council was formed.

(i) Total main school population since 1974

1974	1975	1976	1977	1978	1979
47,427	47,882	48,886	49,392	49,021	48,679

(ii) Size of sixth-form age groups (16+ Students in Schools)

1974	1975	1976	1977	1978	1979
2,991	3,005	2,988	2,990	2,936	3,070

The significant points here are

- (a) the secondary school population has peaked and a decline became established on 1978 and
- (b) the size of the school-based 16+ population has remained an almost constant proportion of the age groups from which it has derived.

In other words sixth-forms have not recruited a higher percentage of pupils during the years shown.

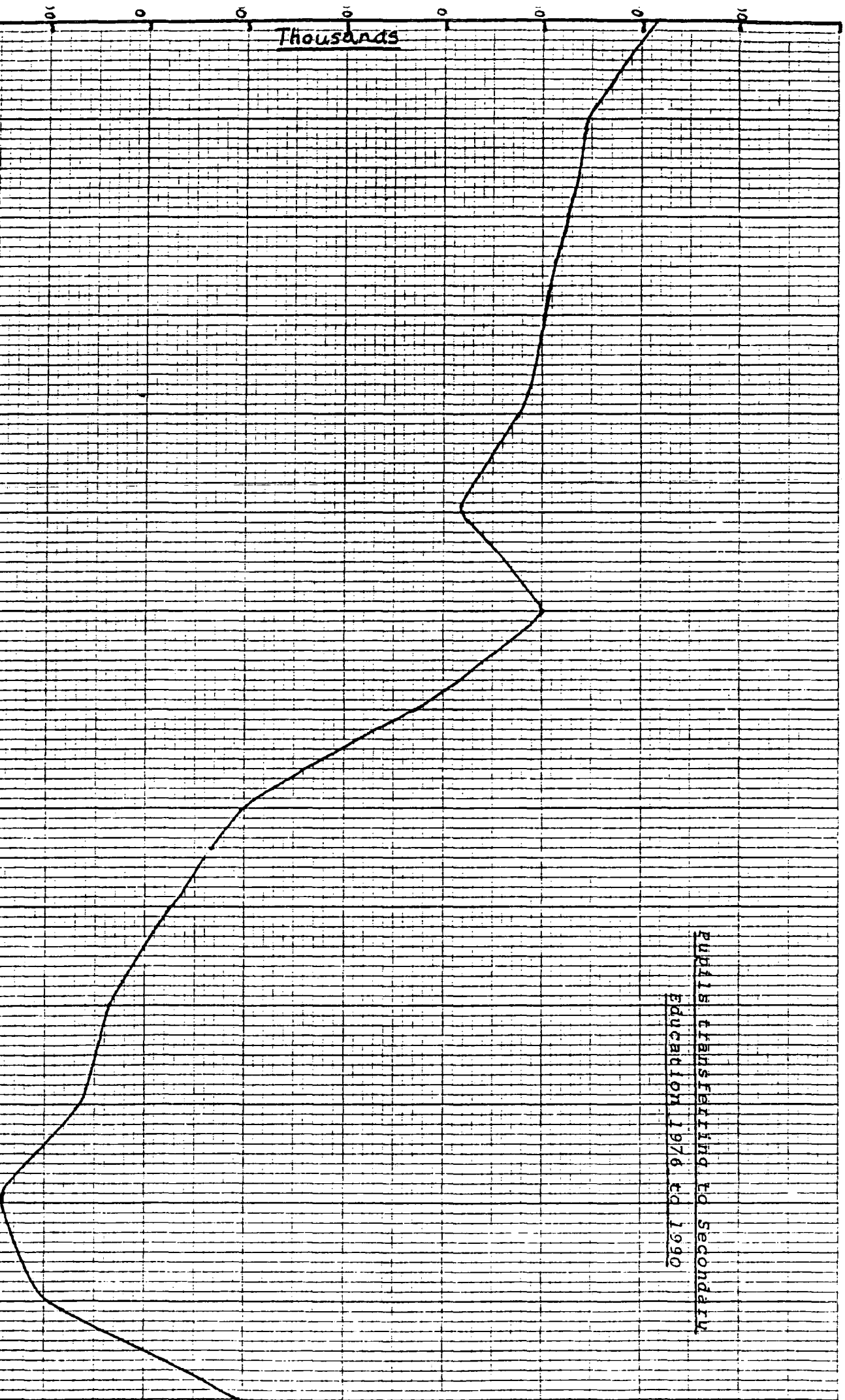
(iii) Current sizes of year groups in county and aided schools (January 1980)

5+	6+	7+	8+	9+	10+	11+	12+	13+	14+	15+
7636	7995	8850	9500	9092	9390	9509	9618	9719	10085	9734
1985	1984	1983	1982	1981	1980					

Year transferred to secondary schools

Thousands

PUPILS TRANSFERRING TO SECONDARY
EDUCATION 1976 TO 1990



During 1980/81 the peak age group will be in the final year of statutory education. Thereafter there is a steady decline with a minor peak shown by the 8+ age group.

(iv) Size of 11+ age group entering secondary education in years subsequent to 1985

1986 : 7337
1987 : 7179
1988 : 6780
1989 : 7012
1990 : 7995

These numbers will be marginally smaller reflecting the loss to private education. The increase in the years following 1988 reflects the improved birth-rate during 1978 and 1979. It will be noted that the age group transferring in 1990 is identical to that transferring in 1984. The graph shows the gradual decline with a minor peak in 1982 and thereafter a very sharp decline until 1989 when numbers transferring to secondary schools begin to recover. Beyond 1990 a further increase will occur for 1991 but the rate of increase is declining.

3. SIZE OF THE SECONDARY SCHOOL POPULATION FROM 1979

(v)

1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
48321	47265	47109	46341	44827	43073	41318	38997	36927	35944	36303

This information in table (i) showed a secondary school peak of 49,392 pupils in 1977 compared with 35,944 in 1989, this is a decline of some 27%. This is shown on the graph which indicates the upturn in 1990. As with the earlier graph the rate of fall in numbers increases after 1983.

The situation after 1990 is problematic. As indicated, the first quarter of 1980 shows a continued increase in the birth-rate but the slowing-down apparent in the last quarter of 1979 continues.

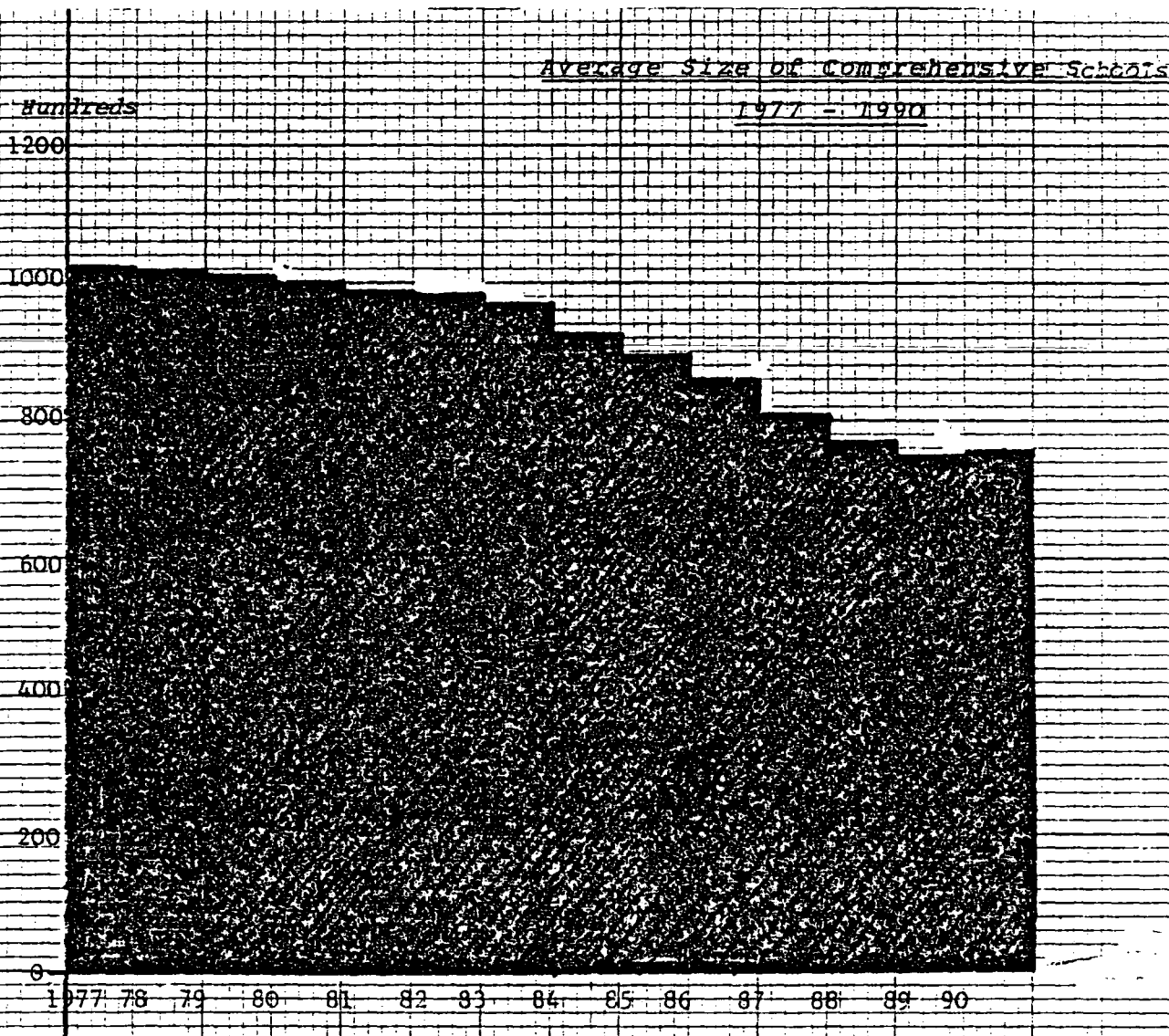


4. WHAT WILL BE THE DIRECT EFFECT OF THIS DECLINE

A decline of the magnitude shown will have a pronounced effect on secondary schools.

Firstly, of course, the average size of schools will fall. The reduction in numbers between 1977 and 1989 is 13,448 pupils. This is the equivalent of over 89 form-entry or eleven eight form-entry schools. In September 1980 there will be 48 county and aided comprehensive schools.

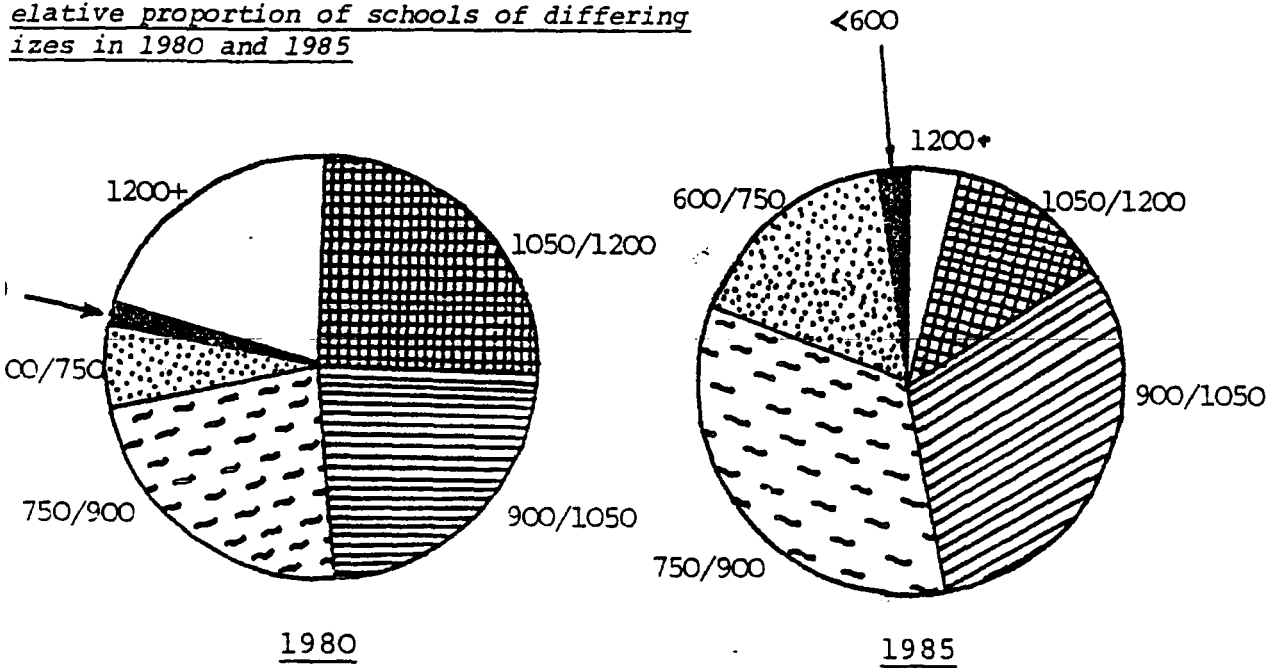
In 1977 forty-eight schools would have an average size of 1029 pupils, by 1989 the average size would be 748. The pattern shown in the graph below shows a gradual decline until 1983, thereafter accelerating rapidly until 1990.



In earlier studies done by the Authority it was shown that the minimum reasonable size for a comprehensive school within the County was 900 pupils. Below this figure, within the limits of available staffing, the curriculum became squeezed and schools had increasing difficulty in providing the range of courses available in larger schools. By the time a school reached 750 in size there were real problems. Some schools now are of that size or smaller and some compensatory staffing is given to help the situation, but the problems still exist. Another difficulty is that available finance from requisition allowances in small schools can be inadequate to cover course demands especially for examination subjects where set books change every couple of years.

The diagram below indicates what will happen during the next five years given that existing schools retain their current contributory areas.

Relative proportion of schools of differing sizes in 1980 and 1985



In 1980 69% of schools are over 900 pupils and a further 23% are between 750 and 900. In 1985 only 47% are over 900 and 34% are between 750 and 900. The percentage of schools between 600 and 750, and these are very small schools, changes from 6% in 1980 to 17% in 1985. The proportion of the very smallest schools does not alter, but the fact that if nothing is done 53% of comprehensive will be below 900 pupils in size in 1985 is a matter which concerns me.

(vi) Percentage of schools within different size ranges

Size	1980	1985
1200+	21	4
1050/1200	25	12
900/1050	23	31
750/900	23	34
600/750	6	17
< 600	2	2

Referring back to earlier parts of the Report it must be remembered that the bottom of the trough does not occur until 1989 and, therefore, schools will continue to decline in size, and the proportion of those below 900 will increase. After 1989 provided that the improvement of the birth-rate is sustained, and currently it shows signs of abating, the numbers will rise by 1995 to perhaps only those levels pertaining in 1985.

I have already indicated some of the educational problems associated with small schools. It must also be said that a reduction in numbers within the available existing buildings will produce considerable economic effects all of which serve to increase unit costs. A school built for 1200 pupils with only 900 on roll illustrates the point. Space heating remains the same for fewer pupils, even with zoned heating systems. Cleaning and care-taking, which is assessed on floor area, would remain unaltered. External decoration and maintenance, rates and insurance would also be unaffected. Schools of this size falling further in numbers would indicate additional non-teaching unit costs, but would also have increased teaching unit costs if additional staff were appointed, recognising their small size.

5. ALTERNATIVE STRATEGIES

It is clear from the previous section of the Report that some schools will be very small by 1985 and will become even smaller. *What strategies can be adopted to cope with this situation which will overcome, at least to some extent, the educational difficulties which will arise?*

(a) Do nothing!

If nothing is done schools will simply get smaller, and as they fall below 900 in size so will their problems of producing a balanced curriculum grow. Small rolls in big buildings will create also higher non-teaching unit costs. This situation might correct itself to some extent, as schools with a limited curriculum might lose favour and parents will choose schools with a wider curriculum. The smallest and most insupportable schools would then have to close. As the average size of comprehensives is going to fall it is likely that the fears of some parents about relatively larger schools will disappear.

This strategy could cause endless difficulties and uncertainties for many schools. Planning for more than a year at a time would be impossible and the insecurity which teaching staff would feel in the smallest of schools could lead to a significant lowering of morale, and difficulties of recruiting and retaining teaching staff, particularly those who are well qualified, and experienced, and those teachers who have career prospects in mind.

It could lead to the maintaining of educationally inadequate schools which would not be to the benefit of pupils, teachers or parents and it is not an alternative to be recommended.

(b) Attempt to redistribute pupils to equalise numbers between schools
This strategy pre-supposes a number of factors:

- (i) that locally there are groups of schools which can share pupils

- (ii) *that the numbers of pupils within such groups are adequate to sustain all the schools involved at a reasonable size;*
- (iii) *that the operation of parental choice is not going to nullify the exercise.*

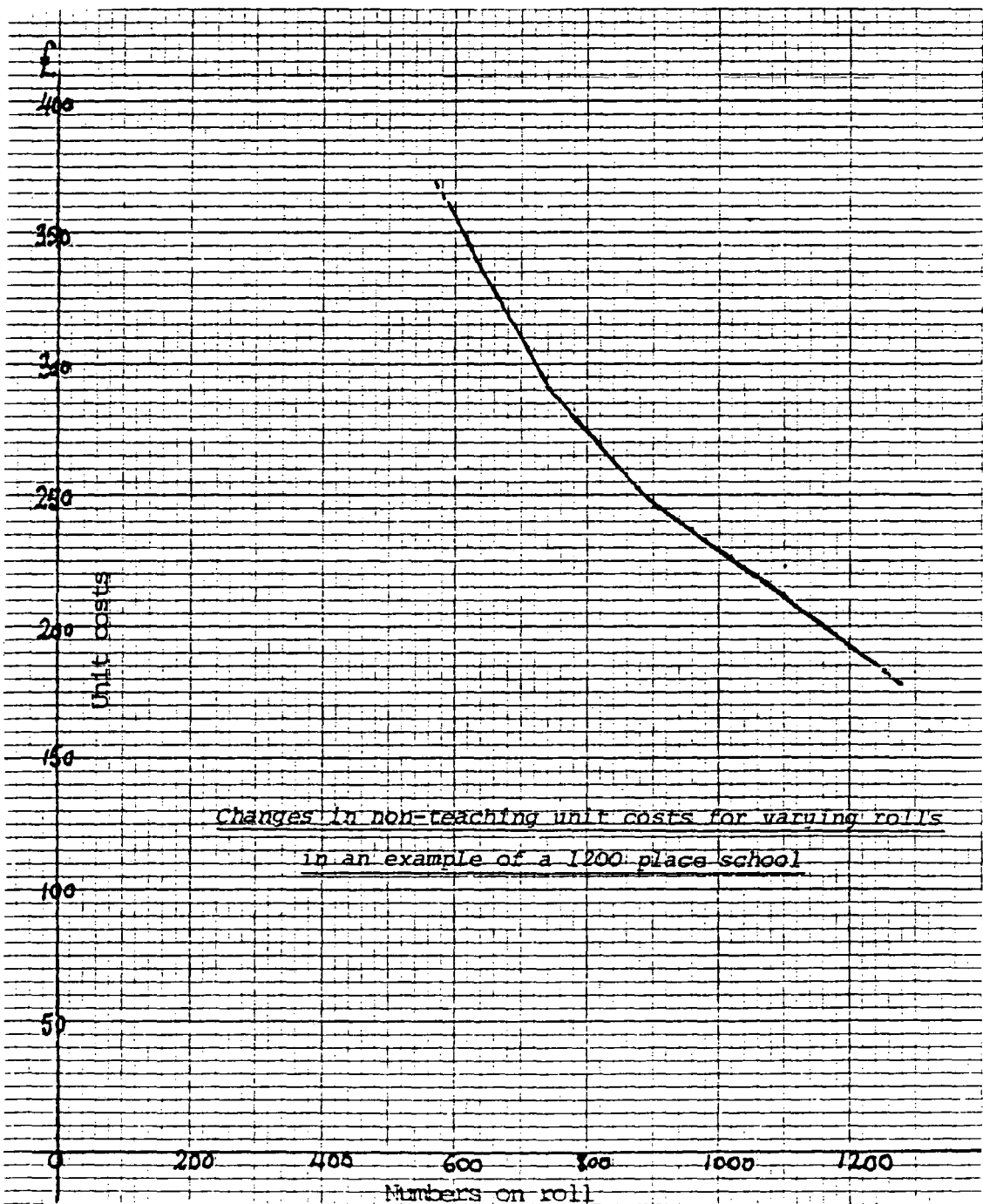
If numbers of pupils are redistributed from larger to smaller schools to maintain an equal distribution of pupils among them, the geographical relationship is important. *They must be near enough to each other to avoid excessive travel for pupils involved. In some areas this could work. It must be remembered, however, that numbers are falling so rapidly, that certainly in some localities all this strategy will achieve would be to reduce some schools of a reasonable and adequate size in order to make all schools too small to be educationally and financially efficient. This would not be an improvement.*

This strategy could be completely frustrated by parental choice. As the number of surplus places grows the *raison d'être* of zoning disappears. The problem is not controlling the overloading of schools but to combat underloading. Under the Education Act (1980) the elaborate procedures for ensuring parental choice will have a significant effect. *Some schools are always more popular than others. The average size of 748 in 1989, referred to on page 4, in real terms means that many schools will fall below this size. The exercising of parental choice is not always predictable. The unpopularity of some schools often stems from factors which appear illogical and unrelated to fact, however, they are real. Nevertheless it would seem reasonable to attempt this strategy in those areas where circumstances are propitious for maintaining schools of an efficient size, which would be of the order of 900 pupils each.*

Within present staffing levels schools falling below 900 in size begin to experience problems in providing staff to cover the full curriculum of a comprehensive school. As schools fall in size an increasing number will begin to experience problems. *One way of overcoming the difficulty would be to significantly increase staffing levels in order to maintain the curriculum. Schools will be expected to provide the same choice of subject or course options which is not possible with fewer teaching staff. The major problem is felt in the fourth and fifth years where most options and parallel examination courses occur. If the same range of choices were to be offered in a school of 750 pupils as are available in a school of between 900 and 1050 it would need ideally between six and seven teachers more than it would be entitled to. Providing this additional staff would guarantee the same curriculum in the fourth and fifth years but the group numbers would be much smaller. By 1985, 53% of schools would have an average size below 900, of these 27% are below 800 in size. Even if the approach outlined in strategy (b) produces results, in some cases, many schools, possibly 20%, would need compensatory staffing. At an additional six staff for such schools, and accepting some contraction in the timetable, this would imply an additional annual teaching cost of at least £568,250 at current prices (calculated at the average secondary teachers salary plus superannuation). During the years following, up to 1989, the cost would rise as more schools fall in size. Schools between 800 and 900 ideally would also require additional staffing, which they do not receive at the moment. This could*

add another £323,000 to the annual budget. Thus, ideally, an additional £891,250 annually would be required to meet extra staffing in 1985, rising beyond this figure for the next four years. It is explicit in such a strategy that non-teaching unit-costs would be allowed to rise as smaller numbers occupy buildings of the same size.

Taking a typical example of a 1200 place school, and excluding the teaching salary costs and debt-charges, during the financial year 1979/80 the unit costs were £192.00. The same school with 900 pupils and 750 pupils, adjusting for requisitions allowances, transport, examination fees, etc., would yield a figure of £245.00 and £291.00 respectively. The graph below indicates the pattern of non-teaching unit costs with a building of static size related to various pupil numbers occupying it.



If all existing accommodation is utilised (excluding that which is temporary) and pupils are redistributed among these buildings, non-teaching unit costs will rise considerably, and if additional teaching staff are provided to compensate for smallness of numbers, so will teaching unit-costs rise.

I said earlier that to redistribute numbers of pupils would be reasonable provided that it maintained schools at a minimum of 900 pupils. Below this number unless it is accepted that costs will rise sharply it would not be reasonable to support schools, because without additional resources they encounter considerable problems.

(c) Closure of accommodation

The Authority has been taking permanent secondary school accommodation out of use since 1974. As part of the implementation of reorganisation proposals there has been a net loss of 3200 permanent secondary school places between 1974 and 1980.

As numbers fall some temporary accommodation can be removed from those schools where it was provided to assist them during the early stages of reorganisation. Nevertheless the surplus of permanent accommodation will be considerable by 1989 and will remain so during the first five years of the nineteen-nineties. As has been demonstrated in foregoing sections of this report it will not be possible to maintain all of these places, with declining numbers, without a considerable increase in costs. There are some 51,000 permanent main school secondary places currently in use. In 1980 there will be just over 48,000 pupils, falling to 36,000 in 1989/90. By the end of the decade there will be an excess of 15,000 places over demand. If the current improvement in the birth-rate is sustained by 1995 that surplus could have shrunk to 11,000 places as demand rises, nevertheless this is the equivalent of nine 12 form-entry schools. In my view it is inevitable that more secondary accommodation will have to be taken out of use during the next few years and this means the closure of some schools, or their amalgamation with other schools, using smaller accommodation.

CONCLUSION

The first priority is the maintaining of the quality of education. As there are limits to expenditure this must be achieved within a reasonable financial framework. To do nothing is to ignore the problem. A mixed policy of redistributing pupils where conditions are right, and this option presents limited possibilities, and closure and amalgamation would appear to be the only satisfactory course of action. Clearly during such a process there will be a disruption of employment and unions must be involved in what procedures are adopted in respect of individual schools. It is unfair and improper that people should read in the press of proposals affecting their livelihood. On the other hand it is equally unsatisfactory that committee members themselves should read in the press about such proposals before information is available to them.

I suggest that whenever a proposal concerning the future of a school is to be presented to a committee, copies of the report concerning such proposals should be distributed at the same time to accredited unions (teaching and non-teaching), and members of the governing body of the school.

SUMMARY

1. The decline in secondary numbers has begun. Total main school population will fall from 49,021 in 1977 to 35,944 in 1989.
2. The fall in numbers is gradual until 1983 and accelerates thereafter.
3. The fall in rolls is the equivalent of eleven eight form-entry schools.
4. Within established staffing policies schools with fewer than 900 pupils have problems of providing a balanced curriculum.
5. The percentage of the total number of schools smaller than 900 in 1980 is 31%. By 1985 the percentage is 53%. The percentage of schools below 900 will continue to grow until 1989, if nothing is done.
6. Doing nothing creates uncertainty and nullifies efforts to plan in a sharply contracting situation.
7. Attempting to equalise the spread of pupils might be possible in some localities but there are limited opportunities.
8. Unit costs will rise steeply if small schools are retained in big buildings and if they are adequately staffed to meet curriculum needs.
9. In view of a projected surplus of 15,000 main school places by 1989/90 some permanent accommodation will have to be taken out of use, and this will mean closing some comprehensive schools.
10. People affected by proposed changes, closures or amalgamations should be properly informed at the right time.

D. J. W. SOWELL

Director of Education

County Hall,
Durham.
13th June, 1980

GATESHEAD METROPOLITAN BOROUGH COUNCIL

EDUCATION DEPARTMENT

REDEPLOYMENT OF HEAD TEACHERS AND ASSISTANT TEACHERS

AGREED CODE OF PRACTICE

certain circumstances it may be necessary to vary the number of teachers employed in a given school. There may, for example, be significant changes in the total number of pupils on roll, in the proportion of pupils in the varying age groups, or a variation in specialist subject requirements. Where these factors result in the need for an increase in the number of teachers employed at the school, there is normally little difficulty in recruiting additional teaching staff required. Where a review indicates that a school may be overstaffed in relation to the Authority's staffing formula, there might be a need to reduce the numbers of teachers employed in such a school. (Having regard to the provisions of Paragraph 8 of Part A of Appendix II of the document prepared by the Secretary of State for Education and Science, under Sections 2 and 4 of the Remuneration of Teachers Act, 1968 (the Burnham Report) the redeployment of a Head Teacher receiving a protected salary which is higher than that justified by the composition of the school as determined on review may be found to be necessary).

In such circumstances it is desirable that any necessary downward revision of staffing entitlement can be effected in such a way that:

- i) the employment of teachers will be maintained;
- ii) full regard is taken of the circumstances and feelings of individual teachers;
- iii) full regard is taken of the educational needs of individual schools.

In these aims in mind, the following procedure has been agreed between the recognised Teachers' Associations and the Gateshead Local Education Authority.

The acceptance by the teachers' Professional Associations of a code of practice for dealing with the redeployment of teachers should in no way be construed as indicating satisfaction with, or acceptance of, existing staffing levels. While recognising the need to ensure that any redeployment is carried out in an equitable and sensitive manner, the teachers' Professional Associations reserve their right to press for improved staffing standards as and when they see fit.

In the event of any major changes of circumstances within an individual school, the Authority believes that it may be necessary to reduce the teacher complement of that school, the Authority will inform the Head Teacher of the school and invite him, after consultation with the staff, to submit observations which he and the staff wish to make. The Director of Education (or his representative) will discuss with the Head any such observations.

- 2 The Authority at the same time will inform the Secretaries of the recognised Teachers' Associations and invite their observations. The Director of Education (or his representative) will discuss with representatives of the Teachers' Associations any such observations.
- 3 If no observations are made, or if notwithstanding any such observations, the Director of Education considers it necessary to vary the teacher establishment (number and grades of posts) of a school, he shall, as soon as is practicable:
- i) advise the Head Teacher of the revised teacher establishment for his school, together with the date from which the revised establishment will be effective;
 - ii) advise the Head Teacher of vacancies for teachers that currently exist in the Authority;
 - iii) ask the Head Teacher to discuss the situation with the staff, and indicate whether or not it is likely that the revised establishment will be achieved by normal staff resignations;
 - iv) advise the Secretaries of the recognised Teachers' Associations of the revised establishment of the school.

It is understood by the Authority that, if representations made by the Teachers' Associations in accordance with Section 2.2 have been disregarded, the Teachers' Associations may wish to take such further steps as are open to them.

If it appears that the revised establishment may not be achieved by normal staff resignations, the Director of Education will inform, in writing, the Head Teacher, and require the Head Teacher to inform the staff of this matter, invite members of his/her staff to consider the possibility of voluntary transfer to another school, and advise them of their entitlement to seek advice from their Professional Associations.

Where teachers may be willing to transfer voluntarily, at the request of the Authority, to another school, the Director of Education will:

- i) provide, on a regular basis, up-to-date lists of vacancies;
- ii) enable such teachers to be considered for vacancies without the need to complete full application forms;
- iii) enable such teachers, during school hours, and with expenses paid at normal 'bus fare rates, to visit other schools to discuss vacancies that might be suitable for them;
- iv) forward to schools with suitable vacancies, details of teachers willing to accept transfer.

a teacher agrees to accept a voluntary transfer and is subsequently
d in a suitable vacancy, the Authority will:

- i) pay any additional travelling costs, at normal
'bus fare rates, for a period of four years following
the date of transfer;
- ii) give the transferred teacher first option on any
appropriate vacancies in his original school which
occur within four years of the date of transfer. The
Authority will endeavour to notify the teacher concerned
of any such vacancies;
- iii) undertake not to consider the transferred teacher
for further transfer, save at his own request, for a
period of four years from the date of transfer, except
in exceptional circumstances where the Teachers'
Associations will be consulted;
- iv) undertake to seek a further placement for the teacher,
should the teacher notify the Director of Education, at any
time within the first two terms after transfer, that he
feels the original placement to be unsatisfactory.

appears that the revised establishment may not be achieved by normal
resignation or by voluntary transfer, then the nomination of a
r for transfer may have to be considered.

tions of a teacher for transfer will be the responsibility of the
or of Education (or his representative), following consultation with
ad Teacher of the school who will, in turn, consult the staff.

Considering the nomination of a teacher for transfer, the following
ples will apply:

- i) the selection will not be arbitrary, or result from
the use of a technique designed to produce a random
result;
- ii) the personal circumstances of individual teachers
must be taken into account. In particular, the following
factors will be considered:
 - a) the career development of teachers concerned;
 - b) ease of travel to alternative schools;
 - c) family commitment;
- iii) no teacher who has been transferred, voluntarily or
otherwise, within the past four years will be considered
unless the individual teacher concerned requests otherwise,
except in exceptional circumstances where the Teachers'
Associations will be consulted;

- iv) the staffing structure, curricular and pastoral needs of the school must be considered;
- v) save by mutual agreement, no teacher who has not completed a probationary period will be considered for transfer;
- vi) wherever possible, teachers will be redeployed between like schools. This will be particularly true of teachers employed in S.P. schools, although it should be understood that no protection of the S.P. allowance is possible under present regulations where a teacher is redeployed from an S.P. school to a non-S.P. school.
- vii) the length of time a teacher has spent in the particular school, or in the service of the Authority, may be considered, but this is in no sense to be regarded as a paramount factor. There will be no application of the principle of "last in - first out".

Teacher nominated for transfer will be accorded an interview with a senior officer of the Authority. The teacher will be advised of his rights and have a representative of his Professional Association present. The teacher will further be advised of his rights under the grievance procedure if he feels his selection to be unreasonable.

Teacher will be informed of all vacancies within the Authority which may be suitable, and will also be informed of the provision which the Authority will make to assist transfer.

Authority will make the following provision to facilitate transfer:

- i) a teacher nominated for transfer will be enabled to visit, during school hours and with expenses paid at normal 'bus fare rates, any schools in the Authority in which it is believed that a suitable vacancy may exist;
- ii) a teacher shall not be compelled to accept a placement which is not a suitable alternative post, having regard to his qualifications, experience and personal circumstances. If there should be particular difficulty in finding a suitable placement, the teacher, together with a representative of his Professional Association, should be accorded a further interview with a senior officer of the Authority with the aim of seeking to resolve the problem;
- iii) where a teacher nominated for transfer accepts an alternative placement, he will be reimbursed additional travel costs involved, at normal 'bus fare rates, for a period of four years from the date of transfer;
- iv) where a nominated teacher transfers to a suitable alternative placement, and because of the additional travel involved, expresses a wish to move house nearer to the new school, that teacher may make application for financial assistance towards the cost of moving. Such an application will be considered by the Personnel Sub-Committee of the Authority and in the event of it being approved, financial assistance towards removal expenses and legal and estate agent's fees, will be made in accordance with the scheme for newly appointed teachers outlined in the Teachers' Personnel Code.

- v) where a teacher (other than a Head Teacher) nominated for transfer accepts an alternative placement and subsequently finds that placement to be unsatisfactory, the Authority will undertake to seek a further placement if the teacher concerned notifies the Director of Education, within two terms of the date of transfer, that he finds the original placement unsatisfactory.
- vi) a teacher who accepts an alternative placement will have first option on any appropriate vacancies which occur in his original school within four years of the date of transfer. The Authority will endeavour to notify the teacher of any such vacancies;
- vii) a teacher who has accepted redeployment from an S.P. to a non-S.P. school will be given first consideration for further re-deployment to an S.P. school as soon as a suitable vacancy occurs.

Teacher nominated for transfer who accepts an alternative placement will be considered for any further transfer for a period of four years from date of transfer, save at his own request, except in exceptional circumstances where the Teachers' Associations will be consulted.

It should be appreciated that redeployment of teachers must take place within the agreed overall staffing establishment of the Authority, and must have regard to the appropriate points score range within the school to which transfer is being made.

Teachers in voluntary aided and special agreement schools are, in law, employees of the managers or governors rather than the Authority, the Authority undertakes to agree with managers and governors to a modified Code of voluntary aided and special agreement schools which is no less favourable to the teachers concerned than that set out above.

When the nomination of a teacher for transfer out of a voluntary aided or special agreement school is being considered, a further factor to be considered in determining who is to be nominated (in addition to those considerations set out in Section 4.2.) shall be the declared preferences of teachers which arise from personal commitment to a particular religious denomination.

Particular consideration will be given by the Education Authority towards providing a degree of In-Service Training and help where a teacher is employed in different circumstances with, possibly a curriculum which lies outside of his scope of training.

The provisions of this Code of Practice shall apply to all teachers other than those who, by the nature of their employment, should be remunerated in accordance with the terms of Appendix IV of the Burnham Primary and Secondary Report (i.e. teachers employed on a day-to-day or other casual notice basis for less than a term).

provisions of this Code of Practice shall apply to Head Teachers whose deployment or transfer is found to be necessary, whether by reason of closure of a school, or in the circumstances indicated in Paragraph . . ., in the same way as they apply to teachers as specified in Paragraph above, so far as the context so admits or as otherwise indicated in s Code of Practice.

GENERAL EDUCATIONAL SERVICES COUNCIL

EARLY RETIREMENT SCHEME

(Revised - 03.02.84)

INTRODUCTION

The Council in consideration of its present and future manpower requirements have agreed to the continuation of its Early Retirement Scheme for all superannuated employees of the Authority. The objectives of the scheme are to enable the Authority to offer early retirement to superannuated employees of the Council either by reason of redundancy or in the interests of the Authority's efficient exercise of its functions. In relation to this latter aspect the Council will consider special compassionate cases where the personal circumstances of the individual employee will indicate that it is in the interests of the Council and the individual to retire early, other than for reasons of ill health or capability.

In applying the scheme the Authority reserves the right to determine which employees shall be allowed to retire prematurely and the amount of enhancement of service, if any, which will be offered in each individual case.

GENERAL CONDITIONS

-) The scheme is open to all employees who are superannuated under either the Teachers' Superannuation Regulations or the Local Government Superannuation Regulations.
-) Applications will be considered from any such employee who is aged 50 or over. However, preference will be given to employees who are older.
-) Nothing in this scheme overrides in any way the rights or obligations of the Council and its employees contained in the Employment Protection Consolidation Act 1978 (as amended) or the contractual rights of the individual employee.
-) Any employee who is given early retirement under this scheme shall not be re-employed by the Council in any capacity.
-) Selection under this scheme shall not be used as a substitute for premature retirement on the grounds of permanent ill health or infirmity of the mind or body or as an alternative to taking formal disciplinary action, if appropriate, on the grounds of capability.
-) The Council reserves the right to determine which employees shall be allowed to retire prematurely and the amount of enhancement of service, if any, which will be offered in each individual case. Cases will be considered by the Personnel Sub-Committee in accordance with the following criteria:

AGENDA ITEM 9 A

Report of the Director of Personnel and Management Services
on the Criteria for selecting those persons eligible to receive
100% enhancements by virtue of their posts being filled by redeployment

1. INTRODUCTION

- 1.1 The April meeting of the Personnel Sub-Committee resolved that the Director of Personnel and Management Services prepare a report for the next meeting of the Sub-Committee on the criteria for selecting those persons eligible to receive 100% enhancements instead of Nil or 50% enhancements by virtue of their posts being filled by redeployment.

2. BACKGROUND

- 2.1 The revised Early Retirement Scheme approved by the Council at its meeting on 3rd February, 1984 (Minute 1645 (7)(a)) recommended that where the Personnel Sub-Committee are considering individual requests for early retirement the following criteria be adopted:-

- (a) Superannuated employees aged 50 or over who apply to retire early be allowed to retire with full enhancements (calculated in accordance with the provisions of the Superannuation Regulations) where there will be permanent financial benefit to the Authority. (To produce this benefit will invariably mean that a post would have to be given up somewhere in the Department concerned).
- (b) In exceptional cases, on the initiative of a Chief Officer but with the full agreement of the employee, who must make the application, superannuated employees aged 50 or over be retired where this can be shown to be in the best interests of the Authority and the employee. In such circumstances the employee will be advised to seek the advice of his or her trade union. The amount of any enhancement to be at the discretion of the Personnel Sub-Committee. (Subsequent vacancies created may or may not be filled).
- (c) Superannuated employees aged 55 or over who apply to retire early be allowed to retire with 50% of full enhancements (calculated in accordance with the provisions of the Superannuation Regulations). In such cases a vacant post arising from the retirement would be filled, thereby creating an employment opportunity.
- (d) Superannuated employees aged 50 or over who apply to retire early be allowed to retire without enhancements, if this is acceptable to the employee, where it is not possible to make compensatory savings. In such cases a vacant post arising from the retirement would be filled, thereby creating an employment opportunity.

Any individual application for early retirement can therefore be judged on the existing circumstances applying to both the individual and the post and a recommendation made as to the amount of enhancements to be granted in accordance with the above criteria.

- 2.3 The position with regard to teaching staff is more complicated in that although teachers are based at a particular school, they are either employed by the Education Committee or in the case of Aided Schools the salaries are paid from the Committee's budget, and in considering any individual application for early retirement one must look at the teaching establishment in the Department as a whole. In addition, it has been identified that there is a need to reduce the teaching staff in the Primary and Secondary sectors by 44 and 21 teachers respectively. It is in the teaching service, therefore, that the current problem of dual recommendations has arisen in considering individual applications for early retirement.

CONSIDERATION OF TEACHERS' APPLICATIONS

3.1 Primary Sector

- (a) Head Teachers and Deputies - there is a statutory requirement to fill these posts and requests for early retirement are granted with Nil or 50% enhancements only (depending upon the age of the applicant). It would only be possible to offer full enhancements where there was a supernumerary "protected" Head or Deputy on establishment who was considered suitable for redeployment.
- (b) Teachers - in assessing whether there is a possibility of considering full enhancements there is a need to look at the primary sector as a whole and if a particular teacher is in a school where the establishment is above the required pupil/teacher ratio (PTR) full enhancements would only be granted if there were no vacancies elsewhere. Where two applications are received, and the establishment for the Department as a whole was only one above PTR (i.e. one vacancy), then the member of staff with the most service would be recommended for full enhancement. This method recognises service given by individuals and would also normally be to the financial benefit of the Authority.

The reason for submitting applications with a dual recommendation was that with the identified reduction in teaching staff, there was obviously a possibility of granting full enhancements to a number of applicants. However, before a firm commitment could be given it was necessary to examine the primary sector as a whole taking into account other movements of staff and the required establishment at each school. The dual recommendations therefore allowed all options to be considered.

3.2 Secondary Sector

- (a) Head Teachers and Deputies - the situation is the same as for the primary sector.

- (b) Teachers - again the situation is the same as for the primary sector except that it is complicated by the requirement for schools to service specialist subjects. Redeployment is therefore more difficult as there tends to be a mismatch between those wanting to retire and the subject requirements of schools. As for the primary sector there is a need to look at the Authority as a whole, e.g. a Scale 4 Mathematics teacher at school 'A' applied for early retirement and it was possible by a series of promotions within the same school to create a Scale 1 vacancy which would not be filled. However, school 'B' happened to have a vacancy for a Scale 1 Mathematics teacher. Therefore, it was not possible to offer full enhancements to the Scale 4 teacher at school 'A', but more appropriate to redeploy the existing Scale 1 teacher from school 'A' to school 'B'.

CONCLUSION

- 4.1 The last date for resignations for teachers wishing to retire at the end of the summer term, is 31st May, 1985 and immediately after this date Head Teachers in secondary schools firm up the timetables for the next academic year. In the case of dual recommendations, where it was not possible to demonstrate a financial saving to the Authority by 31st May, 1985, teachers were given the option to accept Nil or 50% enhancements or reject the offer of early retirement in order to finalise staffing arrangements.
- 4.2 The position with regard to staffing in the primary sector for the next academic year does not carry the same sense of urgency, particularly having regard to the fact that specialist subject staff do not have to be recruited. However, no member of staff has been granted full enhancements where it has not been possible to demonstrate a financial benefit to the Authority.

5. RECOMMENDATION

1. That "dual" recommendations for enhancements (e.g. 50% or 100%) be no longer made.
2. That in future, offers of early retirement and the level of enhancement, be made to the individual on the best available terms on the information prevailing at that time.



Gateshead Metropolitan Borough Council

Department of Education

Prince Consort Road South

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Telephone 091 4783031

To
All Heads of
Educational Establishments

From
Director of Education
W.H. Cubitt. B.Sc.

Date 27 August 1985
Your Ref
My Ref AD/ADM/SPT

Dear Sir/Madam

EARLY RETIREMENT SCHEME

I should be grateful if you would bring to the attention of all members of staff, both teaching and non-teaching, the following recommendations of the Personnel Sub-Committee which were approved by Council on 5 July 1985:

"That "dual" recommendations for enhancements (e.g. 50% or 100%) be no longer made.

That in future, offers of early retirement and the level of enhancement, be made to the individual on the best available terms on the information prevailing at that time but where an offer is made, and refused, and it is later established that a better offer can be made, then the Chairman and Vice-Chairman of the Policy and Resources Committee be empowered to authorise the making of a revised offer.

Where there are two individuals of similar circumstances and only one can be offered 100% enhancement, the individual with the longer service be offered the higher enhancement."

Application forms for early retirement are available from the Salaries Section of this office and members of the teaching staff considering early retirement between now and the end of the Summer Term 1986 should make application by not later than 16 September 1985.

Yours faithfully



Director of Education

This matter is being dealt with by Mr S Cheston

APPENDIX

STAFFING OF SECONDARY SCHOOLS

Since 1974 the Authority has maintained the individual ratios for pupils aged 11-16 inherited from previous Authorities whilst appreciating that there have been considerable and unjustified anomalies between the levels of staffing allowed for schools of a similar size. Even with anomalies, however, the ratios generally recognise that the pupil-teacher ratio required for a small secondary school must be more favourable than that required for a large school in order that a reasonably comparable curriculum can be provided. Another way of making the same point is, of course, to say that there are some economies of size in large schools.

For pupils in the sixth form the Authority has, since 1974, applied a ratio of 1:11 and whilst this has the attraction of being the same across the County, it does not recognise the point that the small sixth forms (and in some parts of the County there is no alternative unless students are to travel very long journeys) are relatively expensive and require a more favourable ratio than average. There are also economies of scale in large sixth forms.

Whilst pupil numbers in secondary schools in the County have yet to fall significantly overall figures disguise the fact that numbers at particular schools have fallen whilst numbers at others have continued to increase. The reduction in numbers of staff at schools has been achieved by not filling vacancies as they arise through normal resignations and retirements, by use of the Authority's Early Retirement Scheme and by use of the Redeployment Scheme. It is appreciated, however, that in order to maintain the curriculum and continuity of courses it is necessary in certain cases to consider replacement of specialist staff at over-staffed schools. Since April 1980 it has been necessary to obtain the approval of the Chairman of the Schools Sub-Committee before replacements may be made at over-staffed schools.

During the last two years the Government has initiated a number of papers concerned with the curriculum. The HMI's paper "Aspects of Secondary Education in England" appeared in 1979 and the DES issued a discussion document "A Framework of the School Curriculum" in 1980. This second paper was followed by "The School Curriculum" from the DES published in March 1981. "The School Curriculum" states clearly many of the important considerations including:-

- (a) "Local Authorities have a responsibility to formulate curricular policies and objectives which meet national policies and objectives, command local assent, and can be applied by each school to its own circumstances".
- (b) "It is the individual schools that shape the curriculum for each pupil. Neither the Government nor the Local Authorities should specify in detail what the schools should teach".
- (c) "Financial restrictions are bound, at least in some areas, to constrain the efforts of Authorities and schools to improve the school curriculum and to give teachers such further training as they may need for that purpose. Coinciding as they will with falling pupil numbers, they will test to the limit the commitment

... continued

and resourcefulness of elected Members, and Officers, of Local Authorities and of all those who work in the Schools. The Secretary of State believes that Authorities and Schools will wish to take a long view of the importance of the school curriculum to the quality of education and, in spite of difficulties, to give priority to the objective of an effective curriculum".

With the decline in pupil numbers it is clear that the objective should be to have staffing arrangements which relate to the need of maintaining a reasonable curriculum. With the assumption that staffing should be related to the curriculum, then it is necessary to describe what a possible curriculum might be and to cost the curriculum in terms of the numbers of teachers required.

Description of a curriculum invariably raises concern about imposition by Central or Local Government which could have the effect of making adaption and development more difficult. It is stressed, therefore, that this reference to a curricular model is not an attempt to impose uniformity but is rather to have arrangements which allow schools to maintain a reasonable curriculum, not exactly the same curriculum in all schools. Schools will continue to be able to distribute the allocated staffing according to their assessments of the particular needs.

During the Autumn Term 1980 all secondary schools in the County were sent a draft discussion paper concerned with an approach to staffing based on the curriculum. This draft and subsequent papers were discussed with representatives of Teachers' Associations. Throughout these discussions there was broad agreement that a different basis for staffing was urgently required to:

- (i) eliminate anomalies
- (ii) acknowledge that a reasonable curriculum must be maintained as schools become significantly smaller, and
- (iii) allow for planning ahead in the reduction of staffing establishments.

In drawing up a possible new approach to staffing it has been clear for some time that there was no likelihood that the Authority would have the financial means to eliminate anomalies and establish a new basis which was at the level of the best provided schools. The concern to protect the curriculum as schools become smaller is not, of course, a guarantee that the Authority would maintain all small Secondary Schools, regardless of their situation. As no additional resources can be made available it is a matter then, at least for the time being, of using existing staffing resources in a different way, acknowledging that some schools will lose whilst others would gain as compared with current arrangements.

The Scheme refers to the curriculum in schools with the whole ability range. The Committee decided that the Scheme should be applied to grammar and secondary modern schools in Ripon and Skipton, but modified in that because grammar schools do not have remedial provision and secondary modern schools do not have to meet the needs of the most able children, it was appropriate to apply a 5 per cent

reduction in the number of teaching periods. This may seem to indicate that comprehensive schools are more expensive in staffing terms than selective schools but this is not assumed and much would depend on particular circumstances, including the number and size of schools in comparable comprehensive and selective areas. For schools in the City of York the Committee decided to delay application of the new arrangements until staffing establishments are settled for comprehensive schools. Schools in York are among the first to feel the effects of falling rolls and in the interim period until reorganisation it is acknowledged that staffing for schools in the City, whilst based on the ratios dating from 1974, should be considered carefully where falling rolls and relatively poor ratios combine to make great difficulties. The intention is that schools should be able to replace 'key' posts in special circumstances although they are over-established according to the application of the ratio for the school.

The staffing establishments of the two 10-13 Middle Schools will be settled individually, having in mind the age group which elsewhere spans Primary and Secondary Schools.

The Authority has recognised that schools with special needs (e.g. split sites, large proportion of service children) should be allocated additional staff. The Committee decided to maintain the existing special allocations, unless circumstances change, but it will not be possible to meet other special needs in the current financial circumstances.

The description of the curriculum and the calculations for staffing are set out on the following pages.

STAFFING OF SECONDARY SCHOOLS

1. The staffing requirements are calculated taking into account the number of pupils in each year group.

Years 1 & 2

2. It is assumed that for the purposes of calculation of staffing requirements, the curriculum during the first two years is as given below:

English	:	5 periods	
Mathematics	:	5 periods	
Humanities*	:	6 periods	*May include History/ Geography, Environ- mental Studies etc.
	:		
Modern Languages	:	4 periods	
RE	:	2 periods	
PE/Games	:	4 periods	
Science	:	6 periods	
Aesthetic/Creative Subjects**	:	8 periods	**May include Art/Music/ Drama/Craft and Design/Home Economics etc.
	:		
TOTAL	:	40 periods (per week)	

3. In order to calculate the number of teaching periods required by this curriculum, assumptions are made about the average size of classes for different parts of the week. It is assumed that out of the 40 periods in the week listed above, 30 of them will be taught in groups averaging no more than 30 children and that 10 periods (probably science and some of the aesthetic/creative subject groups) will be taught in groups averaging no more than 22 children. It will, of course, be up to the individual school to decide on the actual size of the classes - it may be, for example, that if mathematics is taught in sets, schools would prefer to have larger top sets and smaller bottom sets, but the staffing model will provide sufficient staffing to ensure that the average size of mathematics classes does not exceed 30.
4. In addition to the demands of the curriculum outlined above, some provision must clearly be made for remedial work. The way that this is organised in different schools will obviously differ but in order to work out staffing requirements, it is assumed that 10 per cent of the children will be taught throughout the week in remedial classes of not more than 20. Many schools may choose to organise the remedial work differently from this, but the staffing will still be needed to be used in the way that the school thinks appropriate. It is a feature of the calculations that staffing should be such that this notional size of 20 represents a maximum.

... continued

5. A similar approach to maximum size of classes is made when working out the number of teaching periods required for all subjects of the curriculum. Having assumed that 10 per cent of the children will be in remedial classes and having calculated the number of classes required in order to provide that each of these shall have a maximum of 20 children, the number of classes required for the remainder of the year group is then worked out. The assumption made here about size of classes is that 30 of the periods will be taught in classes averaging not more than 30 and 10 periods will be taught in classes averaging not more than 22.
6. Using the basis of calculation outlined above, the table below gives a means of calculating the total number of teaching groups required per week for different numbers on roll in the year group.

Column A	gives the range of the number on roll in the year group.
Column B	gives the number of "remedial" classes (not more than 20 per class allowed for) - it is emphasised that the allowances generated in this way may be used by the school for remedial work in whatever way seems appropriate to that particular school.
Column C	gives the number of teaching groups (for 30 periods per week) in which it is assumed that children will be working in groups averaging not more than 30.
Column D	gives the number of teaching groups (for 10 periods per week) in which it is assumed that children will be working in groups of a maximum of 22 on average.
Column E	gives the total number of teaching groups per week. $(B \times 40) + (C \times 30) + (D \times 10)$.

The number of teachers, in addition to the Head, is calculated, on the basis of an average contact ratio of .8, by dividing the number of teaching groups by 32, assuming a 40 period week.

TABLE GIVING A MEANS OF CALCULATING THE TOTAL NUMBER OF TEACHING GROUPS REQUIRED PER WEEK FOR DIFFERENT NUMBERS ON ROLL IN YEARS 1 & 2

A Number of numbers on in year group	B Number of "remedial" classes	C Number of teaching groups (maximum 30 children)	D Number of teaching groups (maximum 22 children)	E Total teaching groups per week
1 - 50	1	1	2	90
51 - 64	1	2	2	120
65 - 80	1	2	3	130
81 - 86	1	3	3	160
87 - 108	1	3	4	170
109 - 110	1	3	5	180
111 - 130	1	4	5	210
131 - 140	1	4	6	220
141 - 152	1	5	6	250
153 - 170	1	5	7	260
171 - 174	1	6	7	290
175 - 196	1	6	8	300
197 - 200	1	6	9	310
201 - 216	2	6	8	340
217 - 220	2	6	9	350
221 - 238	2	7	9	380
239 - 250	2	7	10	390
251 - 260	2	8	10	420
261 - 280	2	8	11	430
281 - 282	2	9	11	460
283 - 304	2	9	12	470
305 - 310	2	9	13	480
311 - 326	2	10	13	510
327 - 340	2	10	14	520
341 - 348	2	11	14	550
349 - 370	2	11	15	560
371 - 392	2	12	16	600
393 - 400	2	12	17	610

... continued

Year 3

For Year 3 the same assumptions are made as for Years 1 and 2 excepting that allowance for the introduction of a second foreign language or an alternative option has been made so that 14 periods rather than 10 periods would be in groups averaging a maximum of 22 children. Correspondingly 26 periods rather than 30 periods would be in groups averaging a maximum of 30.

Column E gives the total number of teaching groups per week.

$$(B \times 40) + (C \times 26) + (D \times 14)$$

The number of teachers, in addition to the Head, is calculated, on the basis of an average contact ratio of .8, by dividing the number of teaching groups by 32, assuming a 40 period week.

TABLE GIVING THE TOTAL NUMBER OF TEACHING GROUPS
REQUIRED PER WEEK FOR DIFFERENT NUMBERS ON ROLL
IN YEAR 3

A Range of numbers on roll in year group	B Number of "remedial" classes	C Number of teaching groups (maximum 30 children)	D Number of teaching groups (maximum 22 children)	E Total teaching groups per week
1 - 50	1	1	2	94
51 - 64	1	2	2	120
65 - 80	1	2	3	134
81 - 86	1	3	3	160
87 - 108	1	3	4	174
109 - 110	1	3	5	188
111 - 130	1	4	5	214
131 - 140	1	4	6	228
141 - 152	1	5	6	254
153 - 170	1	5	7	268
171 - 174	1	6	7	294
175 - 196	1	6	8	308
197 - 200	1	6	9	322
201 - 216	2	6	8	348
217 - 220	2	6	9	362
221 - 238	2	7	9	388
239 - 250	2	7	10	402
251 - 260	2	8	10	428
261 - 280	2	8	11	442
281 - 282	2	9	11	468
283 - 304	2	9	12	482
305 - 310	2	9	13	496
311 - 326	2	10	13	522
327 - 340	2	10	14	536
341 - 348	2	11	14	562
349 - 370	2	11	15	576
371 - 392	2	12	16	616
393 - 400	2	12	17	630

... continued

Years 4 & 5

1. Within the calculation remedial provision is not catered for separately in years 4 & 5. However, average class sizes have been reduced to 26 (or 20 in some subject areas) to allow for this. Some schools may prefer to work with larger class sizes than this in order to allow for separate remedial groups for part of the week.
2. In order to calculate the number of teaching periods required, the average size of class at any one time of the week is assumed to be a maximum of 26 (or 20 mainly in "practical" subjects). This means, in practice, that if the number in the year group is, say 260 children, it would be assumed that the year group would be split into 10 groups (13 groups mainly in "practical" subjects) but, if the number in the year group is just above 260 these children would be split into 11 groups (14 groups in "practical" subjects).
3. It is also recognised that if the total number in the year group is small, it will be necessary to create a larger number of groups than that indicated above, in order to provide a sufficient range of choice of level or subject within a broad area. It has been assumed, therefore, that three classes will need to be created at any one time.
4. It is also recognised that due regard must be paid to the need for Boys and Girls PE to be dealt with separately. Accordingly, the P E allocation always involves an even number of class groups.
5. The table gives an analysis of the total number of teaching groups required for a year intake. For the purposes of the calculation, it is assumed that the curriculum will consist of the following time allocations (in a 40 period week):-

In teaching groups of average size of 26 or less

In teaching groups of average size of 20 or less (mainly "practical" subjects)

English:	5 periods
Maths:	5 periods
Humanities:	4 periods
Foreign Language:	4 periods
RE/Careers:	4 periods
PE:	2 periods

Aesthetic/Creative Subjects:	4 periods
Science/Applied Science:	4 periods
*Two more subjects (each 4 periods):	8 periods

Total 24 periods

Total 16 periods

i.e. The time allocation is such that each child will spend 24 periods per week in a group of maximum size 26 (on average) and 16 periods per week in a group of maximum size 20 (on average).

*Note: The "two more subjects" would allow for extra science or modern languages, for example.

6. Using the basis of calculation outlined above, the table below gives a means of calculating the total number of teaching groups required per week for different numbers on roll in the year group.

Column A	gives the range of the number on roll in the year group
Column B	gives the number of teaching groups (for 22 periods per week) - working on a basis of not more than 26 children per group (though this is not assumed to be less than 3 groups at any one time).
Column C	gives the number of teaching groups for PE (for 2 periods per week) - again working on the basis of not more than 26 children per group, but always rounding up to the next <u>even</u> number.
Column D	gives the number of teaching groups for other mainly "practical" subjects (for 16 periods per week) working on a basis of not more than 20 children per group (though this is not assumed to be less than 3 groups at any one time).
Column E	gives the total number of teaching groups per week $(B \times 22) + (C \times 2) + (D \times 16)$

The number of teachers, in addition to the Head, is calculated, on the basis of an average contact ratio of .8, by dividing the number of teaching groups by 32, assuming a 40 period week.

TABLE GIVING A MEANS OF CALCULATING THE TOTAL NUMBER OF TEACHING GROUPS REQUIRED PER WEEK FOR DIFFERENT NUMBERS ON ROLL IN YEARS 4 & 5

A Range of numbers on roll in year group	B Number of teaching groups (maximum 26 children)	C Number of PE groups (maximum 26 children)	D Number of teaching groups (maximum 20 children)	E Total teaching groups per week
0 - 60	3	4	3	122
61 - 78	3	4	4	138
79 - 80	4	4	4	160
81 - 100	4	4	5	176
101 - 104	4	4	6	192
105 - 120	5	6	6	218
121 - 130	5	6	7	234
131 - 140	6	6	7	256
141 - 156	6	6	8	272
157 - 160	7	8	8	298
161 - 180	7	8	9	314
181 - 182	7	8	10	330
183 - 200	8	8	10	352
201 - 208	8	8	11	368
209 - 220	9	10	11	394
221 - 234	9	10	12	410
235 - 240	10	10	12	432
241 - 260	10	10	13	448
261 - 280	11	12	14	490
281 - 286	11	12	15	506
287 - 300	12	12	15	528
301 - 312	12	12	16	544
313 - 320	13	14	16	570
321 - 338	13	14	17	586
339 - 340	14	14	17	608
341 - 360	14	14	18	624
361 - 364	14	14	19	640
365 - 380	15	16	19	666
381 - 390	15	16	20	682
391 - 400	16	16	20	704

NORTH YORKSHIRE COUNTY COUNCIL

EDUCATION COMMITTEE

PRIMARY EDUCATION DEVELOPMENT PLANS WORKING PARTY

4 NOVEMBER 1986

Memorandum from the County Education Officer

CRITERIA FOR JUDGING THE VIABILITY OF SMALL PRIMARY SCHOOLS

1.0 PURPOSE OF MEMORANDUM

- 1.1 To consider possible criteria and guidelines for judging the viability of certain small schools, with particular reference to those where the establishment is likely to remain below two full-time teachers as determined by the staffing formula.
- 1.2 To consider any consequential action in terms of recommendations to the Education Committee.

2.0 BACKGROUND

- 2.1 Earlier discussion in respect of the new teaching staff formula has centred on the situation where there are less than two full-time teachers in a school. After considering a memorandum concerning the implementation of new arrangements for determining the teaching establishments of primary schools the Schools Sub-Committee recommended the Education Committee:-

"To ask the Primary Education Development Plans Working Party to formulate for consideration by the Education Committee, criteria for judging the viability of small schools, with particular reference to those where the establishment is likely to remain below two full-time teachers as determined by the staffing formula."

- 2.2 In the DES draft circular "Providing for Quality: The Pattern of Organisation to Age 19" which was considered at the last meeting of the Working Party the following points are made:-

"5. The Department's discussions with the partners in the Education Service have revealed widespread agreement that schools need to be of a certain minimum size if they are to be well-placed to develop and deliver high quality education cost-effectively to all their pupils; and if the maximum benefit is to be derived from the teaching and other resources available to the education service as a whole. There are many small schools in which good teachers have done much to overcome the limitations of size, but there is agreement that, in general, schools below a certain size cannot, even with disproportionate resourcing, fully compensate for the educational disadvantages of smallness."

- "7. Looked at in general terms, the desirable minimum size of a school depends to a considerable extent on its age range and character. A true assessment of the viability of an individual school must also take account of the ethos of the school, the quality and balance of expertise of its teachers and its own teacher support, links with neighbouring schools and colleges, and the fitness for purpose of the premises. However, the following principles, consolidating what was said in "Better Schools" and earlier guidance, give a general indication of the size threshold at which schools of different types can deliver a satisfactory curriculum economically. They are drawn from inspection evidence supported by curriculum modelling and reflect the experience of many LEA's.
8. Given appropriate augmentation of their resources some smaller schools may be justifiable in exceptional circumstances but otherwise the number of pupils in a primary school should not fall below the level at which a complement of three teachers is justified ..."

In respect of primary schools an annex of the draft circular goes on to say:-

"Primary Phase

3. Better Schools sets out the vital main areas of the curriculum which every school should offer to every pupil in pursuit of the necessary breadth, balance and relevance and differentiation.
4. The size thresholds recommended for primary schools are based on the need to offer a curriculum on these lines and, for this purpose, on the desirability of securing a sufficient number of teachers - if necessary by the use of part-time staff - to preserve an appropriate pool of professional expertise, to secure the necessary professional stimulus for all members of staff, and to permit the flexibility of deployment required by, for example, in-service training or the various possible special calls on a teacher's time (e.g. for withdrawal or consultancy work) during school hours. The difficulty and expense of satisfying these requirements increases as the number of teachers in the school declines and becomes acute when this falls below three. In that situation, special support measures on the part of the LEA become essential in order to mitigate the educational disadvantages of the situation."
- 2.3 At their last meeting the Working Party resolved that the above draft circular be noted and that the County Education Officer should have regard to its contents in drawing up possible criteria for judging the viability of small schools for consideration at a future meeting.
- 2.4 For members' information Appendix 1 gives lists of primary schools falling into the following categories:-

List 1 where the staffing formula as presently resourced provides for less than two full-time teachers (although they may currently have two full-time teachers as part of the moratorium arrangement);

List 2 where the staffing formula provides for two full-time teachers, but less than three.

- 2.5 Members may be interested to know that the additional costs of setting certain minimum staffing levels in the schools included in Appendix 1 would be as follows:

<u>Minimum Level</u>	<u>Additional Costs Estimated for 1987/88</u>	<u>Additional Staff Needed f.t.e.</u>
Head + 1	£165,600	13.8
Head + 1.1	£255,600	21.3
Head + 1.2	£345,600	38.8

3.0 FACTORS TO TAKE INTO ACCOUNT

3.1 Drawing up a list of criteria involves a large measure of judgement involving educational, social and economic considerations. Ultimately judgements on the viability of small schools will rest on a balance of factors, some of which are inevitably likely to be subjective. Additionally some factors may be specific to an individual school, its staff, pupils, premises and location.

3.2 Ultimately, the working party may consider that they need to rely on an overall judgement based on a checklist of factors, besides a few more hard and fast criteria. The following paragraphs attempt to provide such a checklist.

3.3 QUESTION

COMMENT

- (1) How great is the age span in each individual class? Whereas a 2-year span is probably acceptable, given a small enough class, a 3-year span may be more questionable and a 4-year span difficult to deal with as a cohesive unit. A 3-teacher school is likely to have classes with a 2-3 year span. A 2-teacher school will have a 3-4 year span. A school with less than 2 teachers will on some occasions span the full 7 years. This may be mitigated by choosing activities carefully at such times.
- (2) How large are the peer groups with whom children can cooperate and compete? The average peer group defined by 'having the same age' is likely to be of about 4 pupils or less in a school with less than 2 teachers. The numbers in individual age groups can vary significantly as Appendix 1 shows. Also, at these smaller numbers the ratio of girls to boys can become a significant factor in parents' minds.

- (3) Do the numbers effectively deprive pupils of a full range of group activities, such as sports, performances etc?
- Many small schools are very inventive at finding ways of trying to overcome these difficulties. Cooperation between schools can help, although it can lead to complications with both staff and children travelling. The Education Support Grant assisted scheme in Swaledale at an estimated cost of £58,500 per annum is an example of one way of improving the service when very small schools need to be retained. A similar scheme is being implemented in Eskdale at £59,500 per annum.
- (4) Are there sufficient staff, with adequately varied skills and experience to provide the required curricular range - in terms of 'core' activities and other aspects of the curriculum?
- In a 1 or 2 teacher school this might be questionable and depends to a very significant extent on individual teachers. The situation is not very 'robust' in that an individual teacher leaving or joining his school has a very major influence for better or worse on the quality of education. There is an extent to which the curriculum can be enhanced by parent helpers, increased staffing and outside support, sometimes at a significant cost to maintain.
- (5) Are teachers able to have the range of professional development and contact required to cope with the diverse nature of the curriculum and of pupils' abilities?
- This is not simply a question of whether staff are able to attend courses, but whether they are able to gain from experience at their school and whether training can only be obtained at significant cost to the pupils in terms of teacher absence from school, for instance.
- (6) How far are the school premises able to allow a full range of activities - sport, PE, Drama, dance etc?
- Many small schools are in old premises which are unlikely to comply with the Education (School Premises) Regulations 1981. In such cases it is likely that some of the activities will be difficult to carry out effectively.
- (7) Is there a case for retaining these older premises for school purposes?
- Some older premises offer certain qualities not found in newer school buildings. Over a short time-scale premises-related unit costs can be smaller than for an equivalent new school, because of lack of space. It is central government's intention that substandard school premises should be brought up to certain standards, where possible, by 1991. Given present capital resources achievement of such an aim appears unlikely in that timescale.

- (8) Has the school sufficient specialist books and equipment - and can likely capitation levels sustain this with or without supplementary assistance from parents and others?
- It can be argued that in deciding to retain a small school the Authority should give a positive commitment to equip it at the required level. With a fixed resource this can only be done with an overall reduction of what is available for other schools. The present capitation system involves a basic allowance besides a per pupil allowance, reflects the minimum resource necessary to run a small school.
- (9) Are the costs of retaining staffing levels at what might be required standards for educational purposes acceptable given other factors?
- A comparison of the 'per pupil' cost with the county average can be provided for members. It needs to be taken into account with other factors and not in isolation.
- (10) Are the premises-related costs justifiable given other factors?
- Similarly a comparison with other schools may be of value here on a 'per pupil' basis. Instances where unit costs are very high or the floor area per pupil particularly extreme may help in deciding whether to carry out a review. In many cases the variation may be a marginal consideration, especially given that many small schools are in premises which are substandard in terms of the floor area available.
- (11) Should the degree of local self help - or lack of it, be considered as factors to take into account?
- In some forms this could reflect the strength of interest parents and the community have in supporting the retention of the school. It could, however, reflect other aspects such as the identified deficiencies of equipment and the general affluence of the area. Such support cannot overcome the problems connected with small peer group size.
- (12) Would the journey to an alternative, larger, school be unacceptably long for some or all of the primary aged children concerned?
- Whereas guidelines, which are now quite old, suggest a maximum journey time of 45 minutes for primary pupils there are likely to be few primary pupils in the county who have to travel for longer than 30 minutes. This time might be considered as normally the longest journey from pick-up point to school which should be contemplated. Whether

or not a maximum normal distance in miles from the alternative school should be considered is more doubtful but a case might be made in terms of pupils belonging to a school's community.

- (13) Are there other reasons why the journey to/from school might be unacceptable e.g. seriously adverse winter conditions, safety of journey or pick-up points? These aspects will clearly vary from locality to locality and are often matters of considerable concern to parents. Each case will need to be considered individually.
- (14) To what extent are alternatives which must be offered acceptable locally, e.g. is the proposed receiving school too small, too large, not acceptable in character, or denominational affiliation? An issue possibly for consultation at both the school under consideration and any proposed receiving school.
- (15) Have the suggested receiving school or schools sufficient accommodation; are extensions or improvements required or should an Area Review be considered? As members' experience will indicate the question of closure of an individual small school can very rapidly become a matter for area review given the issues sometimes raised through consultation.
- (16) To what extent should a decision on the viability of a school be judged on the quality of the education currently offered there - and who should be the judge of this? Whereas this is a factor frequently raised perhaps it should really be considered in relation to the potential quality given an alternative organisation. i.e. might the alternative be at least as good and possibly better. It could also be argued that if the quality of education provided at a particular school is not adequate for reasons other than its small size then steps should be taken to improve that quality in any case rather than (or as well as) closing down a school.
- (17) Are there denominational reasons for retention of a school e.g. does it serve a geographically wider denominational interest than just the local community? This will certainly apply to some RC Voluntary Aided schools, and there may be others depending on the relationships between schools in the vicinity.

- (18) Does the school 'feed' the same or a different secondary school catchment area compared to others nearby which might be potential receiving schools or which might be involved in an area review?
- Whether or not this is a serious factor may depend on the nature of the secondary systems involved. It is, however, generally not unusual for a primary school to feed more than one secondary school.
- (19) Besides the present number on roll are there reasons to consider future numbers on roll, including those which might result from new housing which could materialise?
- Pupil projections should be provided and it might be helpful to have an indication of the number of pupils in the normal catchment area who attend other schools and pupils attending the small school concerned from outside its normal catchment area.
- (20) What other users of the school facilities might be affected if a small school is closed?
- This is one aspect of the importance of a school in its community.
- (21) Are there other community reasons for retaining the school?
- How important a focus is the school and might the premises still be available in some way and be required for community purposes if the school were to close.
- (22) What are the overall financial effects?
- A comparison between various options can be given, partly including those dealt with earlier in the list but also taking into account transport costs, capital receipts and costs of consequential developments. Whereas decisions have not usually been taken previously by the Education Committee in respect of the closure of small schools on financial grounds it must be noted that a revenue saving is able to be used to the benefit of the service generally - either in the locality of the school (e.g. capital investment in the receiving school) or elsewhere.

3.4 It may well be that such a list can be added to, but it is hoped that the major questions linked with the viability of a small school have been covered in one way or another.

4.0 TOWARDS CRITERIA

- 4.1 Many of the items on the checklist, because of their qualitative nature, do not lend themselves to easy restatement in the form of specific criteria. Also, as noted earlier, a decision on the viability of a small school needs to be based on a balance of judgements.
- 4.2 Some firmer suggestions are given below for possible criteria to be used for an initial assessment before deciding to review a particular school. It is assumed that such a review would then take account of factors on the checklist and the normal consultative process before recommendations are considered by the Working Party.
- 4.3 An issue also to be resolved in each case will be whether to widen the scope of the review to consider other schools in the area in more detail rather than seeing them simply as potential receiving schools. In this case an area review will result.
- 4.4 It is stressed that the suggested criteria given below are intended initially for discussion:-
- (a) Subject to modification by other criteria in individual cases there should be an overall aim at achieving schools normally with a minimum of three teachers. This should be the target, unless geographical or other important or unavoidable factors preclude it where new schools or major remodelling/extension of existing schools are under consideration. In other instances where there is little opportunity for rationalisation it is recognised that the aim may not be achievable in the short term.
 - (b) Similarly, unless other overriding factors preclude it, an age span of less than three years should be aimed at in any class, with average peer group size in excess of five pupils where possible. This is an aim for normal circumstances but should not be used artificially to affect a small school's organisation. If decisions in respect of small schools are taken on this basis it will help to limit cases of small peer groups and adverse ratios of boys to girls.
 - (c) Details of costs in respect of staff and premises should be available before the review of an individual primary school takes place to be used in the decision as to whether to review.
 - (d) Schools which are very substandard in terms of their premises or which have buildings likely to have a limited future without significant investment should have priority for review either individually or in terms of the needs of an area.
 - (e) In the case of schools which normally warrant less than two teachers on the revised primary staffing scales these should be considered as priorities for review where it appears likely that acceptable transport arrangements can be made for a very high proportion of the pupils with travelling times between the pick-up points and the possible receiving schools of under half an hour; the shorter the travelling times the higher the priority for review.

5.0 SUMMARY

5.1 If the suggested criteria are used to determine the priority of small primary schools for review they may be anticipated to result in the following outcomes, in due course:-

- (1) Certain small primary schools which on the present staffing formula remain below two full-time teachers would be likely to be retained either following review or because they did not warrant review. They would only be likely to be subject to further review if numbers fell significantly or if the policy were changed.
- (2) Certain small primary schools with less than two full-time teachers, or with two or slightly in excess of two full-time teachers would be reviewed and, depending on the Education Committee's further consideration, might be proposed for closure. This could involve area reviews.
- (3) Other small schools would be the subject of review through factors other than simply the number of pupils on roll, e.g. severely substandard premises. Such reviews would be likely to cover other schools in the area concerned.

5.2 The criteria and suggestions above are based primarily on the consideration of small schools, taken mainly as those having fewer than three full-time teachers. If adopted they may require review in due course in the light of experience.

5.3 Whether or not the suggested criteria are adopted, or others, members may find the checklist in paragraph 3.3 of value.

6.0 RECOMMENDATIONS

6.1 Members' instructions are sought regarding criteria for judging the viability of small schools and recommendations to be made to the Education Committee in this respect.

F F EVANS
County Education Officer

PJ/HML
27 October 1986

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Chapter 1

INTRODUCTION

1. At its meeting held on 20th January, 1981, the Education Committee approved a consultative document, 'Falling Rolls in Secondary Schools', which was then widely circulated and discussed. Meetings were held with teaching staff, there were meetings with the teachers' representatives, and 20 public meetings were held. A report (p.65, Appendix A) summarising the public response was received by the Governing Body of Schools at its meeting on 6th October, 1981.
2. The consultative document had two main objectives:-
 - (a) to inform teachers and parents about the prospective fall in secondary school rolls and the extent of the estimated surplus of places; and
 - (b) to outline what changes might be made in the secondary sector in response to falling rolls.
3. The consultative document indicated that changes were inescapable and suggested that broadly the choice lay between:-
 - (i) 'tailoring' the present system, involving a reduction in the number of secondary schools;
 - (ii) a reorganisation of all secondary schools as 11-16 schools, with post-16 provision organised on a mixed sixth form college/ college of further education basis, or as a 'tertiary' sector.

Either choice might be made across the Authority, or each might be implemented according to area.
4. This report sets out proposals under each of these options and is submitted as a basis for further consultations with parents, teachers' associations and trade unions, at the end of which the Education Committee will make its recommendations to the Council whose proposals will then be submitted to the Secretary of State for approval.
5. When the Education Committee formulates its proposals for recommendation to the Council, the dates of implementation will receive consideration too. When the Council submits the proposals to the Secretary of State for approval public notices of the proposals will be displayed in the schools and published in the local press. The Secretary of State may approve or reject the proposals, or he may approve in part. In reaching his decisions, the Secretary of State takes into

account any objections he receives, and also the advice of HM Inspectors. Objections* (in writing) to any proposal(s) should be received by the Director of Education, Town Hall and Civic Centre, Sunderland, SR2 7DN, within 2 months of the publication of the notices. He will acknowledge all objections received and he will also forward them to the Secretary of State. How long it will take the Secretary of State to announce his decisions cannot be forecast but they will be publicised immediately they are known.

6. Until final decisions are announced, parents are advised not to make any assumptions about the future and to ignore any rumours that may circulate. It will be noted that the re-organisation programmes provisionally outlined in Chapters 5-8 are not dated but are set out in 'programme years' i.e. Year 1, Year 2, Year 3 etc. When, after completing all the consultations, the Education Committee formulates its proposals, the programme of re-organisation will be set out with specific dates.

*The practice in Sunderland is to forward all 'objections' to the Secretary of State though, strictly speaking, a 'statutory objection' requires 10 or more signatures of local electors.

