

Public Document Pack



Executive Board – Special Meeting

Thursday, 13 November 2008 2.00 p.m.
Marketing Suite, Municipal Building

A handwritten signature in black ink, appearing to read 'David W R'.

Chief Executive

ITEMS TO BE DEALT WITH IN THE PRESENCE OF THE PRESS AND PUBLIC

PART 1

Item	Page No
1. DECLARATIONS OF INTEREST	
Members are reminded of their responsibility to declare any personal or personal and prejudicial interest which they have in any item of business on the agenda no later than when that item is reached and, with personal and prejudicial interests (subject to certain exceptions in the Code of Conduct for Members), to leave the meeting prior to discussion and voting on the item.	
2. CHILDREN AND YOUNG PEOPLE PORTFOLIO	
(A) BUILDING SCHOOLS FOR THE FUTURE (BSF) STRATEGY FOR CHANGE (PART 2) AND BSF FUNDING - KEY DECISION	1 - 35

*Please contact Lynn Cairns on 0151 471 7529 or e-mail
lynn.cairns@halton.gov.uk for further information.
The next meeting of the Committee is on Thursday, 20 November 2008*

In accordance with the Health and Safety at Work Act the Council is required to notify those attending meetings of the fire evacuation procedures. A copy has previously been circulated to Members and instructions are located in all rooms within the Civic block.

REPORT TO: Executive Board

DATE: 13 November 2008

REPORTING OFFICER: Strategic Director - Children and Young People

SUBJECT BSF Strategy for Change (Part 2) and BSF Funding

WARDS: Boroughwide

1.0 PURPOSE OF THE REPORT

- 1.1 To provide a summary of the BSF Strategy for Change (Part 2) and seek approval for its submission to Partnership for Schools (PfS) by 19th November 2008. In addition, this report outlines the role and benefits of a Local Education Partnership (LEP) and requests the Board's approval to utilise this procurement route. A summary of the potential sites for capital receipts is also outlined and approval in principle is sought to maximise this income to deliver the BSF Programme.
- 1.2 A copy of the Strategy is attached at Appendix A to the report. Due to their size, the appendices to the Strategy have not been circulated. However, copies are available from the BSF Project Director and the information will also be available at the meeting.

2.0 RECOMMENDATION: That

- 2.1 (a) **The Strategy for Change Part 2, attached at Appendix A to the report, be approved and the Strategic Director for Children and Young People be authorised in consultation with the Executive Board Member for Children and Young People to make any necessary minor amendments following this meeting prior to its submission;**
- (b) **The LEP model be confirmed as the BSF procurement route and that a further report be requested on its potential scope;**
- (c) **Approval be confirmed to maximise capital receipts and seek permission to utilise 100% of capital receipts on vacant secondary premises to fund the BSF Capital Programme.**

3.0 SUPPORTING INFORMATION

3.1 Background

- 3.1 Halton's BSF Strategy for Change was submitted in July 2008. Following assessment by Partnership for Schools (PfS) and the Department for Children Schools and Families (DCSF) the Strategy was approved in August and confirmation was given that the authority could then work with its stakeholders to develop its Strategy for Change Part 2 for submission to PfS by 19th November 2008.

- 3.2 The Strategy for Change Part 1 outlined the vision for Building Schools for the Future in Halton. Strategy for Change Part 2 (SfC2) is a more detailed document that describes how the authority with its key stakeholders intends to achieve its vision. The SfC2 must be pulled together using the PfS Guidance, PfS Checklist and the feedback provided by the DCSF following the submission of the SfC 2.
- 3.3 The Strategy has been developed by working in partnership with headteachers of secondary and special schools, external consultants and other key stakeholders and through the BSF Workstreams such as ICT and Technical. In addition, each secondary and secondary special school within Halton has now developed their own School Strategy for Change for inclusion in the SfC2.
- 3.4 Within the SfC 2 the authority must specify how the authority intends to procure the BSF Programme. It must also explain the prioritisation for investment and how the Programme will be phased. The options for each school site have to be detailed along with a scoring matrix to allow identify the “control option” i.e. most appropriate and affordable option for each school. The Strategy must also address how ICT will be managed in the future and the costs and implications this will have on both schools and the authority. A statement also has to be made within the Strategy as to how the Council will fund the BSF Programme.

4.0 LOCAL EDUCATION PARTNERSHIP

- 4.1 The LEP is a public private partnership between the Local Authority, Building Schools for the Future Investments LLP (BSFI)(a limited liability partnership whose members are the Department for Children, Schools and Families and Partnerships UK and is the central investor in the BSF programme) and a private sector partner selected in open competition under the European procurement rules.
- 4.2 It is a joint venture company whose primary purpose is to ensure that the BSF investment is efficiently and effectively used to deliver a transformed secondary estate. However, a LEP can procure wider local services beyond the secondary school estate and it is a matter for each local authority to determine the exact scope of services it includes within the LEP and whether it wishes to procure a LEP jointly with another authority.
- 4.3 The benefits of this route for Halton are that it prevents the need for repetitive tendering; acts as the interface between all the suppliers, allows the standardised processes developed by PfS to be utilised, provides the opportunity for other services to be delivered through the LEP such as PCP and transfers the risk of procurement from the Council to the LEP company. The LEP enables the authority to deliver its Programme through a mix of procurement routes: PFI (Private Finance Initiative) and conventionally funded projects.
- 4.3 The LEP is the BSF default procurement model and as part of Halton’s

BSF Readiness to Deliver submission in October 2006 a commitment was made to procure BSF through this route. For SfC2 the authority must simply confirm its intention to procure its BSF Programme through a LEP. A further more detailed report can then be considered by the Board on the scope of the LEP in early Spring 2009.

5.0 CAPITAL RECEIPTS

5.1 In all BSF Programmes the estimated costs of the capital work to transform the secondary estate is in excess to the funding the Local Authority receives through the BSF Funding Allocation Model. On the basis of the outline costing completed by the external technical consultants, Currie and Brown and a detailed appraisal of the funding model by the external financial consultants Grant Thornton this is the position in Halton. However, in addition to the funding Halton receives through the formula and as a result of the re-organisation of secondary provision there are four sites within the borough which will be partially or fully vacated once the Programme is complete and therefore can generate capital receipts.

5.2 The four potential sites are Chesnut Lodge School, Ashley School, part of Fairfield High School and part of the sites housing the four Grange Schools. However, prior to the release of any land for capital receipts the authority must consider the impact on the Unitary Development Plan and the Sports England requirements particularly where a Section 77 Request will be needed to release School Playing Fields.

5.3 There are therefore two possible scenarios:

(1) development on the footprint of the school buildings; and

(2) development on the school buildings and part or all of the surrounding school site.

Selection of the appropriate scenario will have financial consequences.

5.4 Under normal BSF rules any capital receipts raised in relation to the secondary estate are split. The first £300,000 belongs to the Council, however, any additional receipts are split on a 50/50 basis with PfS. Our external advisers have indicated that in some circumstances this split has been negotiated in favour of the local authority receiving up to 100% of the value of the capital receipts, providing the authority guarantees that all this funding will be used to deliver the BSF transformed secondary estate.

5.5 Another key issue for consideration is the downturn in the current market conditions and the impact this will have on land valuations. The methodology for valuing any land will therefore have to be agreed and will have to be realistic based on the likely future conditions. Agreement will also need to be reached about the timing of the disposal of each site. The detailed valuation and methodology of each site with the potential for capital receipts does not need to be agreed for SfC2 but for Outline

Business Case in April 2009. For SfC2 an agreement in principle to realise the capital receipts on each site is needed along with permission to try and make a case to secure 100% of the value of any capital receipt. It is therefore proposed a further report is submitted in early Spring 2009.

6.0 FINANCIAL IMPLICATIONS

6.1 The BSF Programme will provide capital funding in excess of £100 million. In order to secure this capital funding the authority must produce a Strategy for Change Part 2 and then develop an outline business case. Each of these documents must be approved before the funding is finally approved.

7.0 OTHER IMPLICATIONS

7.1 Halton has developed both a Primary and Secondary Strategy for Change. These two linked strategies provide the vision for 21st Century provision for the children and young people in the borough.

8.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES

8.1 Children and Young People

By undertaking a secondary school re-organisation and entering into the BSF Programme the authority aim to transform secondary provision for all children and young people and improve the facilities for the secondary workforce.

8.2 Employment Learning and Skills in Halton

Through access to an excellent secondary school for all pupils, standards will improve providing greater employment prospects for Halton's Children and Young People.

8.3 A Healthy Halton

In developing its secondary schools for the future the authority will demonstrate how it will enable schools to meet the school sport Public Service Agreement through its capital investment and achieve high nutritional standards and encourage healthy eating. Opportunities to increase extended services through schools and provide more integrated health provision will be developed through BSF.

8.4 A Safer Halton

Schools for the future will be designed to ensure that children, staff and other community users feel safe and secure on schools sites.

8.5 Halton's Urban Renewal

Through the BSF Halton schools will become a major resource for

communities they serve and will be designed to offer shared community facilities, linking to other wider regeneration projects as well as being the focus for the local delivery of children's services.

9.0 RISK ANALYSIS

9.1 It is a requirement that the Authority produce a Strategy for Change by 19th November 2008. This Strategy must be approved by Partnership for Schools (PfS). In producing the document drafts have been submitted to PfS for comments and advice. Meetings have also been held with the assigned PfS Advisor to ensure the Strategy is approved once finalised.

9.2 The ability to transform the secondary estate in Halton will be limited if 100% of the capital receipts cannot be secured.

10.0 EQUALITY AND DIVERSITY

10.1 The Strategy for Change is aimed at increasing diversity, access and choice, address under performance and provide more integrated local services for children, young people and their families.

11.0 REASON FOR THE DECISION

11.1 A Strategy for Change Part 2 must be completed by all authorities in the BSF Programme.

12.0 ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

12.1 N/A

13.0 IMPLEMENTATION DATE

13.1 The Strategy for Change must be submitted to PfS by 19th November 2008.

14.0 LIST OF BACKGROUND PAPERS UNDER SECTION 100D OF THE LOCAL GOVERNMENT ACT 1972

Documents	Place of Inspection	Contact
<u>Strategy for Change Part 1 & (Guidance PfS)</u>	3 rd Floor Chester Building – Grosvenor House, Runcorn and website www.halton.gov.uk/bsf	Ann McIntyre – Operational Director – Business Support and Commissioning
<u>Halton BSF Strategy for Change Part 1</u>	3 rd Floor Chester Building – Grosvenor House, Runcorn and website www.halton.gov.uk/bsf	Ann McIntyre – Operational Director – Business Support and Commissioning

DCSF Letter (7th August
2008) Strategy for Change
Part 1

3rd Floor Chester
Building – Grosvenor
House,

Ann McIntyre – Operational
Director – Business Support
and Commissioning

Building Schools for the Future

Strategy for Change Part 2



For any queries please contact:

Daniel Hennessy
Programme Director

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INTRODUCTION

Halton is a place on the move. Our 'can do, does do' approach is delivering real benefits and new opportunities for people who live and work here. Our population is starting to grow after years of decline, crime is falling, our children are leaving school with better qualifications, employment prospects are broadening and ambitious regeneration projects are changing the physical environment.

We know from our sophisticated intelligence that there are areas of Halton where poor health outcomes, low employment levels, low skills, and environmental issues combine to create inequalities across the Borough that will require concerted and long term effort. To improve the quality of life in the Borough and reduce the gap between the worst off and the rest we must recognise and deal with the interplay between all of these factors. We are proud of what we have achieved so far but also recognise that there are some really difficult issues we need to tackle.

We see the Building Schools for the Future (BSF) as a key tool to accelerate this progress by providing the opportunity for Halton to develop 21st century facilities and enable world-class standards and services for children and their families to be delivered. This specifically supports those families in the most deprived areas facing the most challenging circumstances. Halton Borough Council has been tasked with the lead responsibility to develop the strategy with partners and to act as a commissioner of local services that both reflects the needs and develops the aspirations of the local community and contribute to the national and local priorities for Halton. This is a challenging role and will require a comprehensive evaluation and re-alignment of our school estate to ensure that investment is targeted to areas where it will have the greatest impact.

In recent years there has been significant progress in secondary school performance; the investment BSF Capital will deliver, will enable further change and help Halton to take a further step change towards engaging with the whole community. The Programme will combine capital investment and the use of innovative emerging technology to enable a personalised route for all, as well as developing best practice in terms of partnership working to deliver world-class services particularly to achieve a narrowing of the gap for children from disadvantaged families.

This strategy is a long-term plan for educational transformation. It is not simply about replacing old and worn out buildings with new and carrying on as before. The strategy sets out new models of school organisation and governance and new ways of working in well designed, sustainable and inspiring buildings which will pave the way for new and better ways for children to learn and teachers to teach. It will link the investment to the realisation of our important local priorities: closing the gap in attainment levels between the highest and lowest achieving schools in the Borough and aligning the supply of school places with demand. In so doing it will help us to improve the lives of children and families for many years to come. We have identified the key strategic areas where we wish to make an impact on outcomes for children and families; these being:

Improve educational outcomes for all;

- Provide the support and challenge to improve school performance;
- Enhance multi agency working so we can intervene earlier and increase capacity for extended services and community use;
- Supporting teaching and learning through ICT;
- Secure inclusion and further enhancing the provision for pupils with special educational needs;
- Promoting healthy eating and increasing participation in sports and physical exercise;
- Promoting new approaches to school organisation and governance.

Halton's vision for Children and Young People needs to be viewed against a history of improvement since becoming a unitary authority in 1998. There has been a significant improvement in both attendance and attainment. The vision for the BSF, PCP and the Children Plan are all aligned as we see this as a 0-19 transformation of learning in Halton to:

"... further develop learning environments which are innovative, flexible and dynamic where every learner is valued and has the opportunity to achieve and realise their individual potential"

While Halton Borough Council has been tasked to lead in preparing this strategy it has very much engaged with a wide range of partners and stakeholders to ensure that a shared vision and plan evolves.

Our prime goal is to raise standards and the aspirations of young people, as this ultimately gives greater opportunities for personal fulfilment and the opportunity to discover one's own true potential. We will achieve this in partnership with our stakeholders by seeking to unlock the potential of all learners through high quality provision, exciting and innovative learning opportunities and underpinned by our commitment to removing the barriers to learning through our inclusive approach. This outcome of this means:

- Our key role is to lead on the development of a Halton wide "Learning Community" within which all learners can develop a real and lasting enjoyment of learning and come to value the opportunities that high quality learning can provide.
- Our focus is on the learner and the quality of teaching and learning opportunities learners have access to.
- Our expectations are very high. In consultation with our schools and other partners in our learning community, we will set and achieve challenging targets.
- Our pace will increase to ensure we raise standards for every learner and for the community that we serve.



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- To achieve our goals we will aim high and accept nothing less than continuous improvement. We will continue to strengthen the excellent partnerships that exist within our learning community.
- Our agenda is challenging. To achieve this we will build on our existing commitment to becoming a learning organisation that values the individuals within it and those who work in partnership with us.

Some Key facts about Halton:

- Population in 2006 was 119,500 (it was 124,800 in 1991 and 118,300 in 2002)
- Overall area is 7,937 hectares, of which 97% is urban.
- There were 53,935 jobs in 2006
- 7,782 of these jobs were in manufacturing (down from 12,570 in 1996) of which 3,310 are in chemicals (halved since 1996)
- 26% social housing (nationally 18%)
- High Gross Value Added (GVA) (because of capital intensive industry), above average wages, but low household income
- 1.2% (Black Minority Ethnic) BME population
- While Halton's population remains predominantly White/British (98.8%), we are seeing a small number of migrant workers joining the Halton workforce, together with students arriving from predominantly Libya to take up studies at Riverside College.
- Halton's overall deprivation score and rank has improved since 2004. Its rank has improved from 21st to 30th in 2007, rising 9 places and becoming one of the 25 Local Authorities in England to most improve. However, there still remain some areas of deprivation in Halton that rank within the top 3% in England. The Windmill Hill Ward is Halton's most deprived area and Birchfield is still the least deprived. 8 Wards in Halton are categorised to be in the top 40% most deprived in the country. These Wards are where 50% of our primary and nursery schools are situated. The Wards are: Windmill Hill, Riverside, Halton Lea, Norton South, Grange, Castlefields, Kingsway and Halton Brook. (Appendix A - IMD Rating)



1 SECTION 1: MEETING CHALLENGES AND KEY OBJECTIVES

1.1 WHERE IS THE AUTHORITY NOW IN TERMS OF EDUCATIONAL OUTCOMES, DIVERSITY OF PROVISION, FAIR ACCESS AND CHOICE?

Demographic and economic challenges

Halton is a deprived, but improving Borough, moving from 21st to 30th in 2007 (IMD). 49% of the current population live in the most deprived wards in the country and there are areas in the Borough ranked in the top 3% most deprived in England. In 2008 of the Boroughs 18,534 school children, 6,810 were living in workless households, whilst a further 6,650 children lived in households in work but with less than 60% of the median income, and therefore deemed to be living in poverty. Levels of free school meals in schools range from 10.6% to 47.0% with the authority average entitlement being 23.9% against a national average of 31.6%. There are low numbers of Black and Ethnic Minority groups (2.8%) within the Borough.

Educational Outcomes

At KS3 Halton has slightly closed the gap on national levels of attainment over the last four years. In 2008 English L5+ was 71.8% (NA 73%), Maths was 72.3% (NA 77%) and Science was 69.6% (NA 71%). In KS4 standards have been rising at over double the national rate of improvement. In 2008, figures show that 70.5% achieved a rate of 5 A*-C grades (2007 NA 60.9%). 5 A*-C grades including English and maths has further improved to 49.2% (2007 NA 46.8%). However pupils eligible for free school meals performed significantly less well on this measure (23.9%) compared to those not eligible (54.8%), and boys (44.7%) performed less well than girls (56.1%). Furthermore, FSM boys were the lowest performing group (16.9%).

97.4% of learners achieved at least one qualification in 2008 (2007 NA 98.9%). 2007 CVA scores indicate that Halton learners make good progress at secondary school, with KS2-4 scores being 1013.0 whilst KS3-4 CVA was 1020.9, however the CVA score for KS2-3 was slightly below national levels at 99.4. Secondary absence was 8.1% in 2006/7 (NA 7.8%) with unauthorised absence being 1.9% (NA 1.4%). The 2007/8 baseline figure for NEETs is 11.5%. (NA =6.7 and statistical neighbours= 9.2%)

Current Provision

Secondary education is currently delivered in Halton through 6 community schools (11-16), 2 voluntary aided RC schools (11-19), 3 Special Schools (one of which has post 16 provision) and the PRUs. The majority of post 16 learning within the Borough is delivered by Riverside College. Wade Deacon and Fairfield schools are currently progressing plans to federate. 7 of Halton's schools currently have a specialism. No schools are currently in an Ofsted category or are a cause for concern to the Authority, however the performance of Halton High School is currently below 30% 5 A*-C (including English and Maths) at 18.3%, and is due to become an Academy under our BSF proposals. The Grange Comprehensive School is seeking Trust status (and has been accepted on the DCSF Trust early adopter's scheme). It is the school and Authority intention to establish an all through school combining all the Grange schools on the current campus, and plans for this are currently being developed. Ofsted inspections since September 2005 indicate that Overall Effectiveness was judged to be outstanding in 2 schools (17%), and a further 8 schools (66%) were judged to be good or better. Of the 8 high schools, leadership and management is judged to be good or better in 5 (63%) and outstanding in 3 (38%). 90% of admission preferences were met for the September 2008 intake.

Provision around inclusion and special needs is good, both in terms of identifying children with complex needs at an early stage, and planning individual provision on a multi-agency basis. The latest figures indicate that 100% of statements were issued within the statutory timescales. 1.39% of pupils aged 5-15yrs are educated in maintained special schools This includes 217 in Halton maintained special schools and 13 in extra district maintained special schools. Currently there are 67 pupils attending out of authority schools (aged 0-19Yrs). Halton currently maintains 606 statements which is 1.95% of the 0-19yrs population

The DCSF published target for an average computer: pupil ratio in 2004 was 1:5 in secondary schools, Halton is currently achieving 1:2.62. In addition, the Authority has provided a very reliable school connectivity of 10mb enabling availability of high quality media rich learning resources and opportunities within a safe and secure national network. Individual targets were previously agreed with DCSF Regional Broadband Consortia (RBC). The Authority has recently completed a network review and has provided substantial improvements to the infrastructure - line speed, firewall and web filtering in order to ensure the School / Authority infrastructure is ready for the deployment of future technologies such as IPT, Wireless and IPCCTV. All high schools have agreed to use the Halton Common Learning Platform (Uniservity), having been involved in extensive consultation and evaluation. The majority of high schools are now using the platform, with two schools having scheduled their final phase of training to support whole school implementation by October 2008. This ensures that all schools have met their DCSF target of having access to a VLP at 1st April 2008 and that all pupils have been able to access a personalised online workspace, capable of supporting an e-portfolio i.e. learning platform from August 2008

Working in partnership with schools and through managed moves, PRU outreach and access to a broad range of alternative curriculum providers, Halton schools have worked proactively on reducing permanent exclusions Through maintaining small KS3 and KS4 PRUs, the needs of those learners for whom a school setting is not appropriate at a particular point in time can be met. The PRUs offer a broad and balanced curriculum and both were judged to be "Good" in the last Ofsted inspection.

The TDA target for Halton is for 58 schools to deliver the extended schools core offer by Sept 09, and for all schools to achieve this by 2010. At the current time, 44 schools (64%) are delivering the core offer, therefore exceeding the



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target. Dialogue is underway with schools and PCT regarding the delivery of extended health services in school settings, and in high schools with a particular focus upon sexual health issues.

There are 43 schools with the Artsmark (3 Bronze, 21 Silver and 19 Gold). There are 4 schools with the Sportsmark Award (3 specials and 1 high school) and 40 primary and special schools have the Activemark Award. 84% of children in Halton schools access 2 hours of high quality PE and Sport. Locality teams are now established co-ordinating the delivery and targeting of extended services via children's centres, schools, youth and community settings on a geographical basis. From Autumn 2008 health services (particularly health visiting and school health advisors) have been realigned to also work on this basis. Strategic needs analysis is now informing priority issues according to each locality and workforce deployment is now linked to these identified issues.

The key issues for Halton are therefore:

- contributing to the regeneration of the Borough through raising attainment and achievement by the age of 19 and reducing NEETs;
- addressing inequalities and narrowing the gap in outcomes for children, young people and communities;
- improving rates of attendance; and
- raising the profile of, and engagement in, learning in all communities.

1.2 HAT ADDED VALUE WILL BSF INVESTMENT PROVIDE TO LOCAL EDUCATIONAL OUTCOMES – WITHIN AND BEYOND THE SCHOOL DAY?

BSF will enable Halton schools to significantly improve attainment. Our benchmark will be that every learner fully achieves their potential. It will also ensure that all schools exceed current DCSF floor targets, including the new KS4 target of 30% 5 or more A*-C grades including English and Mathematics. Currently underachieving groups such as boys and pupils on free school meals will be more effectively targeted so as to move them towards Local Authority and national averages. The BSF investment will allow us to set the challenging targets for 2017 outlined in the chart (Appendix 2). These are based upon the premise that in every Halton School learners will, on average, attain top quartile progress by 2017.

We will achieve this through:

- providing purpose built spaces to allow and encourage the development of new forms of learning and pedagogy to provide a more personalised and effective learning experience;
- better enabling young people to meet their personal targets and aspirations by allowing improved access to an expanded range of curricular opportunities;
- supporting the development of the 14-19 curriculum through introducing the full range of diplomas accessible wherever learners are located;
- using 21st Century ICT to underpin a dynamic and challenging curriculum within which young people and their families can develop as independent learners supported by highly trained teachers. ICT will provide timely individual progress data, enabling weaknesses to be addressed and appropriate support offered;
- providing resources and spaces within which vulnerable groups can have their needs met;
- demonstrating the importance of learning throughout the Borough by providing state of the art facilities in each community;
- offering stimulating learning environments based upon creative building designs and flexible spaces, to engage all learners;
- utilising new forms of governance to improve school standards and increase the choice and diversity on offer to learners and their families;
- developing a talented, skilled workforce led by outstanding leaders who work collaboratively across the community with a shared commitment to excellence; and
- establishing collaborative networks and partnerships involving all key partners and agencies.

Our BSF programme will enable us to provide a significantly widened range of opportunities beyond the school day that will have an impact upon the performance of all learners. In particular, we will target under-performing groups and areas of the greatest social deprivation in order to close the gap in performance between the highest and lowest achievers. We will promote opportunities for the families of learners and other adults to re-engage in learning in order to raise self-esteem and counter negative perceptions in communities where levels of disengagement are high. By 2017, through BSF, all secondary and secondary special schools will, as a minimum, provide communities with extended access to enhanced learning opportunities and multi-agency services. We will develop:

- A wide range of out of school hour's activities, e.g. study support, homework clubs, ICT, sports, arts, special interests, volunteering, business and enterprise;
- Support for parents and carers, in particular those responsible for vulnerable young people, including guidance at key transition points, targeting within a multi-agency approach, and inter-generational family learning sessions to allow young people to learn with their parents;
- Swift and easy referral to a wide range of specialist support services, e.g. Child and Adolescent Mental Health Services (CAMHS), family support services, intensive behaviour support, sexual health services and school-based youth workers;
- Providing wider student and community access to ICT not limited by the time of day or location, to sports and arts facilities and adult education.



We will develop proposals to bring current and planned school investments in ICT into a coherent plan that supports an area-wide solution. An ICT work stream is in place to lead this work and has representation from all parts of the local educational network. A critical piece of work will be to determine the scope of services offered as part of the managed service and how these will affect innovation, transformation and functionality. The specification will build on ICT investment in advance of BSF and the ongoing strands of innovation and excellence evidenced in many of the schools in Halton to date.

We will work closely with schools, CLC, local College, our CDA and external design consultants to ensure that ICT functionality sits closely at the centre of learning space design as well as launching a series of multi-stakeholder events to raise the “art of the possible” and to ensure that the internal and external stakeholder voices are included in the definition of services and provision. We continue to take on board the lessons and challenges brokered by earlier wave Authorities and seek to draw on the best practice and successes these predecessor programmes have enjoyed to date. This includes seeking to bridge the divide between home and school-based data access, ensuring an equality of provision and access supported by ICT in all our schools and finally, allowing for the full range of abilities and requirements of both learners and teachers to be accommodated in all our teaching and learning spaces

This added value will be measured by the range of Key Performance Indicators set out in this document (Appendix 3), focussing particularly on:

- improved attainment of students, and in particular students eligible for FSM and boys;
- improved levels of attendance;
- reduced number of learners who are NEET;
- improved satisfaction levels of learners, families and communities;
- a reduction in the number of Halton Pupils educated out of Borough at 11 and 16;
- improved number of pupils from Halton entering Higher Education;
- successful implementation of additional method of learning and teaching to create personalised pathways through participation rates in change management CPD;
- Student Leadership involvement in BSF;
- high levels of family and community involvement in programme and provision;
- improved inclusion in mainstream schools and a decrease in extra district placements;
- increased access to and uptake of Sport, Arts and Culture opportunities and activities; and
- improved employment of looked after children.

1.3 HOW DOES THE AUTHORITY PROPOSE TO ENSURE CHOICE, DIVERSITY AND ACCESS FOR ALL PARENTS AND PUPILS IN ITS SCHOOLS?

At the completion of the BSF programme, Halton will be served by 3 Community schools, 2 Voluntary Aided Schools (1 Roman Catholic and 1 Joint Faith), 1 Academy, 3 Special schools (2 to be co-located on main stream sites), and a Key stage 3 Pupil Referral Unit with KS4 provision being through a ‘virtual’ PRU.

Each secondary school will have a complimentary specialist status as set out in Appendix 7, and schools will be supported to develop a second specialism to increase the choice and diversity on offer. Plans to develop a Joint Faith High School will help create greater community cohesion and ensure that parents are able to opt for Church of England secondary provision within the Borough for the first time. The development of an 11-19 Academy within the Borough will support the further development of a secondary school that has already transformed many areas of secondary performance. It is anticipated that the Academy will attract learners previously unwilling to attend Halton High school, thereby ensuring its viability and promoting greater social cohesion and community engagement. Diversity within the Borough will be further enhanced through the provision of an All Through Trust School for learners aged 0-16 years in the form of The Grange Partnership. Discussions are currently underway with four potential Trust partners (A University, A Primary Care Trust, Halton Borough Council and An ethical plc). The timeline for Trust Development is as follows:

September 2008	Federation of 4 partner schools
	Contact proposed Trust partners
October 2008 – July 2009	Meetings with Trust partners to explore working relationship
April 2009	Executive Headteacher takes up post and development of SMT begins
September 2009	The Grange becomes a single all-through school
	Initial involvement by Trust partners in building knowledge base of school
	Formation of Trust Board
Spring 2009	The Grange becomes a Trust school



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Further details of the Trust Development are found in Appendix 23. Further details of the statutory consultations can be found at Appendix 5.

Each Special School will be developed as a centre of excellence and will continue to share its expertise and experience with mainstream schools through outreach support. Inclusion and outreach will be further enhanced through the plans to co-locate two of the special schools onto the site of two mainstream secondary schools. This will ensure that at the same time as enhancing inclusion, young people feel secure in their own school environment.

The two highest performing secondary schools within the authority will be expanded in response to parental demand. One school increasing by 375 to 1500 places and the other increasing by 150 to 1200. The development of ICT within the Borough will increase access for all learners, but in particular for those learners currently unable to physically access opportunities. In addition parents and carers will have increased access to information on pupil progress and support.

We are developing proposals to bring current and planned school investments in ICT into a coherent plan that supports an area-wide solution. An ICT work stream is in place to lead this work and has representation from all parts of the local educational network. A critical piece of work will be to determine the scope of services offered as part of the managed service and how these will affect innovation, transformation and functionality. The specification will build on ICT investment in advance of BSF and the ongoing strands of innovation and excellence evidenced in many of the schools in Halton to date.

A particular issue for Halton currently is the physical split of the Borough, effectively two towns divided by the river and we will look to an ICT solution that delivers a coherent plan to ensure this physical divide is filled by robust networks and accessibility for all schools regardless of their location.

We will work closely with schools, CLC, local College, our CDA and external design consultants to ensure that ICT functionality sits closely at the centre of learning space design as well as launching a series of multi-stakeholder events to raise the “art of the possible” and to ensure that the internal and external stakeholder voices are included in the definition of the ICT service. We continue to take on board the lessons and challenges brokered by earlier wave Authorities and seek to draw on the best practice and successes these predecessor programmes have enjoyed to date. This includes seeking to bridge the divide between home and school-based data access, ensuring an equality of provision and access supported by ICT in all our schools and finally, allowing for the full range of abilities and requirements of both learners and teachers to be accommodated in all our teaching and learning spaces.

A PE and Sport Stakeholder group has been established (See Appendix 18) to develop a coordinated Borough-wide strategy (See Appendix 8)

1.4 HOW WILL THE AUTHORITY ENSURE ROBUST CHALLENGE TO SCHOOLS, INCLUDING STRATEGIES FOR EARLY INTERVENTION IN THE CASE OF UNDERPERFORMING OR FAILING SCHOOLS?

Halton’s School Improvement Strategy underpins the co-ordination of support, challenge and intervention for all schools, with all schools ‘categorised’ according to the level of support required using the Strategy for Support and Intervention in Halton, developed in line with the Education and Inspections Act (See Appendix 24).

In brief, there are four identified categories of support to schools:

- A. Core Support, which covers most schools
- B. Vulnerable Schools – support without which a school might become a cause for concern
- C. Schools Causing Concern (SCC) – i.e. designated by Ofsted as requiring either Special Measures or a Notice to Improve or those where the Authority feels such classification is appropriate
- D. Formal Intervention in respect of SCC that do not improve enough

Levels of performance and factors to trigger intervention, could come in the form of an adverse Ofsted inspection, or Authority judgements that deem the school to be inadequate based on information from the SIP and other multi agency colleagues

The sharing of intelligence in relation to our schools’ performance is fundamental to this categorisation and associated school improvement. A comprehensive range of national and local data, prepared by the Management Information and Communication Division, is used to inform the review of school improvement at school, local authority and national levels. This data informs the work of a range of colleagues including SIPs, School Standards and Effectiveness Officers (SSEOs) and National Strategy Consultants, enabling early identification of schools that are, or are at risk of, underperforming.

This intelligence also feeds into the Authority’s Cross Service Monitoring Group (CSMG), made up of a wide range of professionals from across the CYPD, who meet regularly to review schools (in the presence of the headteacher and Chair) to ensure the identification of risks and support required across the ECM agenda is met.

The progress of vulnerable pupils including under-achievers continues to be of the highest priority across the CYPD and early intervention is effectively targeted through partnership working. Where appropriate a Raising Attainment / Single Plan are implemented to ensure targeted support for core subjects.

The co-ordination of school improvement support for secondary schools is led by the Secondary Strategy Manager and the SIP manager. This enables the targeting of challenge, intervention and support in line with the agreed Strategy.



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As a result of improvements to teaching and learning and leadership and management there are currently no secondary or secondary special schools categorised as a School Causing Concern either by OFSTED or the Authority, although two schools (Halton High and The Grange have been identified as National Challenge Schools) These schools will become an Academy and Trust respectively. Continued targeted support will be provided for these schools, enhanced through the additional capacity provided through inclusion in the National Challenge (See Appendix 21). Extra support and challenge will be provided by the National Challenge Advisers and the Authority designated National Challenge team. The Authority has maintained its School Standards and Effectiveness Officers to work in partnership with SIPs in a shared support and challenge role.

In 2004 Halton High was put into Special Measures by OFSTED but was removed from this category in 2005 following significant improvements which have on the whole been sustained. The most recent inspection report, February 2008, stated that *'the school continues to improve well. Halton High is an effective school. It has built on previous strengths and has made good improvements.* This reflects the school's significant improvement in 5+A*-C from 29% in 2005 to 60% in 2007, however unvalidated results for 2008 indicate there has been a decline to 45% with 18% 5+ A* - C including English and maths. Significant improvement in both capped and uncapped points score from 218.4 in 2005 to 260.8 in 2007 [capped] and from 247.5 in 2005 to 373.2 in 2007 [uncapped]. KS2 - KS4 overall CVA improved from 994.7 in 2005 to 1003.1 in 2007 with significant improvement in VA from 952.2 in 2005 to 979.5 in 2007 and improvement in relative attainment [KS2-4 all subjects] from -70.3 in 2005 to -37.5 in 2007. KS3-4 CVA for all subjects improved from 1001.9 in 2005 to 1014.6 in 2007. (See Appendix 2)

Similarly, in 2006, The Grange Comprehensive was given a Notice to Improve by OFSTED, again improvements in performance led to the school being removed from this category following an inspection in July 2007 when OFSTED judged that *'the school has determinedly tackled the issues identified for improvement in the last inspection report. Impressive progress has been made in raising attendance which is now satisfactory. Since the last inspection the school has placed a heavy emphasis on improving learning which is beginning to reap rewards.'*

In The Grange, the 5A*-C including English and Maths score has fluctuated at or below 27% over the last 3 years. There was a significant improvement in 2007 with respect to 5A*-C with a 10% points increase from 36% to 46%. At the same time, there was an increase in both the capped and uncapped points score but this is still significantly below the national average. There has been significant improvement in KS2 - 4 CVA from 1003.5 in 2005 to 1023.3 in 2006 along with improvement in relative attainment for both capped and uncapped points score. The KS3 - 4 CVA for all subjects increased significantly from 100.0 in 2005 to 1026.2 in 2006.

2008 resulted in further progress with 57% of pupils attaining 5+ A* -C, and 35% including English and maths – an increase of 11% 5+ A* - C overall.

Halton has also supported SS Peter and Paul Catholic College to address the particular issues around CVA scores. In June 2007, Ofsted graded the school as satisfactory with several good features. The Unvalidated Key Stage 4 results for 2008 show that 5 A* - C increased to 73% a 31% from 2004. The statutory target of 5 A* - C including English and maths was 48% a rise of 20% since 2004. This year's school's provisional CVA is 1007.

Authority intervention will include targeted consultant support for all schools, with an increased proportion for the 2 National Challenge schools with Halton High receiving a total of 108 days consultant deployment, and the Grange Comprehensive 101 days. (See Appendix 25)

Underperforming groups and subjects

Identified underperforming groups include white British boys and also those from the areas of highest deprivation (using attainment of FSM and non- FSM as a basis for comparison).

The issue of attainment of pupils from areas of deprivation relates to our ambition to remove barriers to learning, including the remit of the wider Children's Services policy. Whilst it can be very difficult for consultants to target pupils on FSM, many of these pupils will be supported through identified targeted group's e.g. borderline level 4/5 at KS3, G&T groups etc. Programmes include the use of Wave 2 materials, continued focus upon personalisation and the development of an authority wide strategy for assessment for learning. Collaborative learning is promoted through Authority network activities. (See Appendix 26)

The engagement of boys continues to be an authority focus. This includes work with local male writers as role models (including Levi Tefari and Melvin Burgess) facilitated through the work of our English consultant. The embedding of the SEAL curriculum is also a key vehicle to develop the social and emotional skills of all learners, including those at risk of disaffection.

The Authority's strategy to address attainment of underperforming groups is co-ordinated through the work of the secondary consultants and is outlined in individual contracts with schools. Regular meetings with NS subject advisers and the Annual Standards meetings with senior National Strategy advisers (and GONW) provide the forum for shared evaluation of impact in relation to raising standards.

Subjects Causing Concern

The only subject where there is any authority wide cause for concern is Geography. In 2007, Halton pupils attained an average half a GCSE grade less than would have been expected according to subject residual data. This is an area on which our secondary teaching and learning consultant is constantly working on, both in schools and through the Secondary Geography Network.



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1.5 HOW WILL THE LOCAL AUTHORITY DELIVER PERSONALISED LEARNING TO ENSURE THAT EVERY PUPIL IS FULLY STRETCHED AND CAN ACCESS A BROAD CURRICULUM THAT BEST SUITS THEIR NEEDS AND TALENTS?

Christine Gilbert in the 2020 Vision document defined Personalised Learning:

Personalising learning and teaching means taking a highly structured and responsive approach to each child's and young person's learning, in order that all are able to progress, achieve and participate. It means strengthening the link between learning and teaching by engaging pupils – and their parents and carers – as partners in learning.

This requires schools to modify learning to each child's individual need, interest and aptitude so as to ensure that every pupil achieves and reaches their full potential. However, this definition brings with it huge implications in terms of the curriculum on offer, teaching methodology and the assessment methods used within schools.

The need for personalised learning for Halton is crucial in terms of:

- narrowing the attainment gap;
- reducing the over-representation of disadvantaged groups amongst low attainers;
- responding to the 'higher skill demands' expected in both education and training;
- responding to a more socially and ethnically diverse society; and
- preparing our young people for the increased power of technology.

Every School has begun to determine its own plans to deliver personalised learning within the Every Child Matters framework. Schools have high expectations of all pupils and its workforce in terms of achieving the best possible outcomes, both educational and personal. This will lead to all children developing the knowledge, skills, understanding and attitudes that will enable young people to thrive – in school and beyond. High quality teaching will be essential and this needs to respond to pupils' differing learning styles and acknowledge young people and their parents as partners in learning. To enable all children to progress, achieve and participate, teaching will need to be:

- highly structured;
- responsive; and
- learner-focused, knowledge focused, and assessment focused.

Transformational change will take place at every level. Within Halton, all educational settings have already begun the 'learning journey' and this will impact Leadership, teaching and learning, continued professional development and structured transformational change that takes account of the context for each institution.

Central to this philosophy is our drive to develop a transformational pathway to a curriculum that will meet the needs of the individual and align with the National Secondary Strategy. We welcome the QCA's advocacy of the recognition for the development of a curriculum that builds knowledge and understanding, skills and abilities and attitudes and attributes. Our vision is that these three elements should not be seen as distinct or exclusive but rather should combine to provide exciting learning opportunities for all, promoting the use of critical thinking skills, problem solving and collaborative project based learning. Such ways of working are vital in developing a skilled workforce of the future that will increase the prosperity of the Borough as a whole. Schools are beginning to develop alternative pathways that cater for individual need and choice. Examples include accelerated learning that enables pupils to sit KS3 and KS4 examinations when they are ready and not at a chronological time and the engagement service meeting the needs of our most challenging young people with a diverse range of courses with suitable qualifications and pathways.

Personalised Learning will make a difference to pupil outcomes in Halton and the BSF plans support this. This will be achieved through meeting the needs of: - Learners, Parents/Carers and Wider Community, Workforce Development, and the Structural and Technological requirements.

To meet the needs of the learner:

- student's individual needs will be met both within school and in the wider community, for example through enhanced teaching spaces and supportive technology that caters for pupils of different abilities and skills;
- students will have greater involvement in their learning and the curriculum 'package' that will enable them to fulfil their potential through programmes of study that challenge and engage pupils of all abilities; and
- students will have greater opportunities through more tailored support and ownership of their learning that will be enhanced through learning centres around the school to support independent learning.

To meet the needs of Parents/Carers and the wider community:

- parents' will be able to be more engaged with their child's learning and have the opportunity to play a more active role in schools;
- parents will have increased confidence in our schools with greater access to information and direct involvement in their child's education;
- there will be greater accessibility for all users with learning spaces for use by the wider community together with on-line libraries; and
- learning will extend beyond the 'normal' day and schools will become the hub of the community, and offer a variety of services.



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To meet the needs of the workforce:

- teachers will be able to share best practice both within school, the authority and beyond so that pupil's emerge as successful and confident learners with the skills required to function in the 21st Century; and
- teachers will engage pupils in learning partnerships and prepare themselves for change through continued Professional Development, resulting in teaching becomes learner led and more focused embedding the best principles of Assessment for Learning.

To provide the structures and technology for learning:

- classrooms will be designed to allow for flexible learning to take place so that pupils make progress in whatever setting;
- school organisation will become more flexible to allow for different lengths of time for assessment of the different skills and characteristics of learners and the variety of learning experiences that will take place. This will require flexible classrooms that enable innovative teaching to take place;
- schools will be secure and safe for learners and will be interesting and welcoming environments; and
- classrooms will allow for greater curriculum breadth and delivery of a wide range of courses including the new diplomas (and new national curriculum);
- ICT will be a valuable tool in developing independent learning and lead to young people able to function appropriately in an ever-changing technological world in which we live;
- schools will focus on the progress of all students using on line assessment packages that supports pupil progress and identification of individual needs;
- E-learning and mobile technology (wireless access) will support personalised learning; and
- Learning Platforms will be accessible from schools, homes, libraries etc.

This entitlement will be underpinned by a clear focus on the importance of developing sustainable models of leadership for learning and the opportunities presented by technology to extend and enhance learning.

The new curriculum will also allow for more flexibility, focusing upon 'learning' and acquiring skills rather than be content driven. This will allow schools to explore 'real' learning situations and project based approaches with pupils being more creative, independent, self confident and learning to collaborate with others in group situations.

Improved technology infrastructure will enable schools to provide greater and more flexible access to a range of learning environments with the use of online collaborative communication tools within and across institutions at a variety of levels. Flexible access to teaching staff through both face to face and remote contact will be introduced along with an increased amount of freedom for pupils, within careful guidance, to work to their own preferred learning and communication styles and direct their own actions. This will greatly enhance the range of learning opportunities available to gifted and talented pupils as well as those underachieving pupils for whom more established learning styles have proved to be a barrier to learning.

We recognise that personalisation is a challenge that mandates a shift in both the supply and demand elements of the education service delivery equation. Learner expectations need to be raised to recognise the value and advantages of charting a personalised route through the education process and aspire to achieving and engaging in more rewarding and meaningful manner. Teaching professionals, administrators and the wider stakeholder group need to anticipate the challenges and adapt practice and expectations to be aligned to this new delivery requirement. Our ambition is therefore to ensure that all learners, regardless of ability, stage or age have access to the new service delivery model and tools to transform their routes into and through education which is personalised and geared towards universal improvements in attainment.

We will take advantage of the funds ring-fenced for ICT to ensure that an extended range of learning opportunities including assistive technology developed by special schools and specialist providers are tailored to suit all learners' needs and are available to provide enhanced access to learning for pupils with additional support requirements.

The BSF investment provides the opportunity to achieve our vision of all the schools in Halton operating as learning community hubs, by connecting all of our learners through our common MLE and management information system. An MLE system will form the nucleus of an interconnected and pervasive network that brings together the information and resources necessary to support personalised learning. Our ICT solution will ensure that different learning styles are supported by multi modal content and that devices designed to access learning reflect the needs of the individual. We will also ensure that assistive technology fully supports those with physical disabilities or other learning difficulties.

Our solution will mean that learning is not constrained by the physical structure of the school or other establishments, but will be available on demand at any location. We will provide 24-hour access for all learners to well structured, easily accessible web-based resources which meet criteria based on potential for sound educational impact. This will be realised by building on our local experience of the innovative use of mobile technology, wireless and other ways of communicating, e.g. The current pilot schemes being undertaken at the Heath involving the use of ultra-mobile PCs in delivering the English Curriculum, PDA projects with the CLCs and localised wireless projects. We will also incorporate the successful components and lessons learned of initiatives developed in the CLC and elsewhere into a new solution that provides an integrated framework. A continuing utilisation of new technologies such as Personal Digital Assistants (PDAs), Smart phones, video, podcasts and other interactive facilities to provide greater flexibility, choice for learning and opportunities for new ways of collaborative learning / remote teaching communications. A trial project is well underway at The Heath School in order to help evaluate some of these new technologies.

Greater involvement will be introduced for parents and carers in their children's learning through easy access to up to date information.



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The Halton Learning Platform will form the hub of an interconnected network bringing together the information and resources needed to provide a personalised learning experience for all students. This will be in terms of the equipment used to access resources, the resources themselves and teaching and learning strategies to transform learning opportunities.

Our ambition is that the learning platform will allow parents and carers secure access to the work of their children. We intend that parents will be able to interact with the system, contribute to learning support, and access information regarding their child's progress at school. This will remove the boundaries between home and school learning and will draw our diverse population into the schools (either in a virtual or physical sense) and will ensure that the cycle of engagement, development and relationship building will continue. From an ICT perspective, we are fortunate that we have a single, shared provider for the MLE and our aim is to strengthen this and our common MIS (SIMS) infrastructure to ensure uniformity and reduce complexity across the range of learning institutions for practitioner, parent and learner data needs.

1.6 HOW WILL THE AUTHORITY ENSURE THE EFFECTIVE DELIVERY OF THE 14-19 ENTITLEMENT IN PARTNERSHIP WITH LOCAL LSC AND LOCAL FE PROVIDERS?

'First class Learning - World Class Opportunities' is the 14-19 vision for our young people in Halton set out within the Halton 14-19 Strategy and Learner Entitlement. The 14-19 Partnership recognises that the BSF programme will be instrumental in raising standards and achievement at 19 and reducing young people who are NEET. Realisation of this vision will enable learners to accelerate their learning and achieve their goals. Learners will be offered learning that allows them to gain qualifications at level 2 earlier in readiness to start advanced level 3 studies, or undertake enrichment activities. The well-established 14-19 Partnership consisting of Halton Officers, all secondary schools Head Teachers, the College Principal, and representatives from Diocese, LSC, Connexions and Work Based Learning Providers has the responsibility for implementing the 14-19 Strategy and local Education Plan through the collaborative structure to ensure that the full national entitlement is met by 2013.

New Diplomas in each occupational sector of the economy will be delivered through the co-ordination of the partnership commissioned by the Local Authority (after 2010) using a quality framework approach. Gateway consortiums of the partnership have been successful in five applications for delivery commencing in September 2008 with plans in place for the 17 diplomas to be available from 2012. This will be particularly relevant at Level 3 and will greatly strengthen the Level 3 offer and performance of Level 3 at age 19. Specialist schools will strengthen partnerships between 14 to 19 school-based providers and others. The Halton 14-19 Partnership will regularly audit current and anticipated capacity to deliver the reformed 14-19 curriculum. This will inform commissioning and decommissioning of provision, clarify resource requirements, and inform our diploma and other curriculum delivery planning. The 14-19 partnership will work closely with the LSC until 2010 when responsibility for commissioning provision transfers to the Local Authority. The Halton 14-19 Partnership builds on strong collaborative arrangements that have already delivered aligned timetables and is delivering increased choice; encouraging those who are deterred by travel and enabling young people to access the course they wish to follow irrespective of their home or base school or college. Movement of students across and out of the Borough will be kept to a minimum.

The DCSF is clear in its rationale for the education of young people to the age of 18/19. Its foundation is a 'coherent 14-19 phase offering a rich mix of learning opportunities from which young people can choose tailored programmes and gain qualifications appropriate to their aptitudes, needs and aspirations'.

The proposal is to develop a collegiate model with a collaborative in Widnes and a collaborative in Runcorn. The Collegiate will be owned by the local schools and Riverside College. Working collaboratively the secondary schools, Riverside College, WBL providers and the Gateway will then be in a position by 2013 to deliver the national entitlement including vocational elements, AS/A Levels, IB and new Diplomas to the highest standards of excellence with above national achievement rates for Halton's learners. Effective collegial direction and management combined with the Authority's oversight as commissioning agency will act to assure the highest standard of course delivery leading to a step change in achievement rates for Halton's learners.

At the heart of the entitlement will be the Borough's offer to Halton learners that cannot be delivered in isolation. The entitlement will set out all options and pathways available to young people including location of delivery. BSF investment in ICT will ensure that in addition to a virtual learning environment, learners will have access to information, advice and guidance tools, an online prospectus of provision and a common application process. A transformational step is that all schools, the local college and work based learning providers are seen as future Centres of 14-19 Learning with equal status, delivering a single provider model for young people in Halton. Employers will be engaged in planning with a view to them providing work related learning opportunities on and off site. The establishment of the Collegiate, working with, alongside and through the secondary school sector and the College of FE will provide the basis for assuring:

- high quality, natural progression pathways to level 3 for all;
- effective deployment of BSF and LSC capital investment;
- driving up standards; an attractive alternative to existing cross border provision; and
- access for all to the full range of provision (for some learners through more than one provider).

Informing this is the consultation that has taken place including interviews and discussions with key stakeholders including Halton's Head Teachers, the Authority, the FE College Principal, The BSF Programme Director and the LSC to analyse the proposals in the context of national and local requirements for 14-19 education and training, previous reviews, reports, best practice and an understanding of issues and observations raised by stakeholders.

Diploma delivery will be led across the Borough by either Riverside College or a school. Where there is sufficient demand teaching may be carried out by peripatetic specialists from a lead provider to reduce the need for learners to



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travel. Learners may be accessing some of their principal learning away from their 'home' school but will remain connected through the common learning platform, virtual learning environment and other on-line resources. All learners will have access to the core curriculum and the latest information communication and learning technologies to enable independent and remote learning. This technology will also be essential to enable learners to have access to teachers and other support regardless of location. The model supports equality and diversity as all learners will be following a personalised learning pathway to meet their individual need with opportunity to access the breadth of curriculum at the level appropriate to the individual learner at any point in their 14-19 learning. In so doing we will ensure that the needs of all vulnerable learners are met and that provision is highly inclusive and reduces the numbers of learners who become NEET.

There will be an Authority model for delivery of post-16 education that raises standards and meets the requirements of the Authority and partners, the model will complement the delivery of both the BSF and the college capital investment programme; school specialisms will effectively support the delivery of the 14-19 agenda and build on existing faith provision as part of the diverse offer in Halton. The key to 16-19 provision is that it must be learner focused, high quality and offer real choice and diversity. Provision will be closely integrated with broader 14-19 provision. Over £50 million capital investment in Riverside College will complement the investment in BSF; coming together in a unified Borough post-16 strategy centred on excellence and relevant to the needs of the local and regional economy. This will drive up standards and provide a natural progression route for young people onto a personalised a 14-19 learning pathway and provide an attractive alternative to existing cross border provision. All learners will have access to the full range of level 3 provision. This in turn will reduce the drop off rates at 16 and 17 that contribute significantly to the high NEET % in the Borough.

The key drivers behind this planning framework are raising the standards in level 2 including English and maths, and in level 3 performance; deliver the new secondary curriculum and national entitlement; Machinery of Government (MOG) 14-19 Planning and Commissioning; outcomes from Raising Expectation consultation March to June 2008; alignment of Riverside College capital investment and the Building Schools for the Future programme.

Achieving these proposals demands a more creative approach to learning and teaching to accommodate pupils being taught in a variety of settings across Halton for different 'subjects' across the 14-19 curriculum, and that institutions act together to raise the standards of the whole. The Authority recognises the potential impact of an increasingly broad curriculum offer and gateway engagement as fundamental to the strategy for change. We intend to build upon existing good practice to support pupils who are failing to progress in more traditional settings. This includes the work of The Bridge and Gateway Schools (KS3 and KS4 PRUs) that are successfully planning and delivering alternative curriculum pathways, contracting providers and quality assuring brokered provision. This pro-active approach to tackling disaffection has already resulted in a significant reduction in permanent exclusions through outreach to both primary and secondary schools and their work with targeted pupils.

Providers will collaborate in order to deliver the full range of provision and be expected to deliver high quality successful provision that will be determined through the commissioning process. Collaboration is not new to Halton's educational establishments. Diploma developments, for example are thought by Heads to provide a good model for effective, coherent collaborative working which plays to schools' and the college's strengths. It is acknowledged that all options and pathways available to young people will constitute the Borough offer, entitlement to which cannot be delivered by any educational establishment in isolation.

A robust strategic analysis will be carried out to inform the commissioning of all 14-19 provision and identify where the curriculum is best delivered and best located.

This analysis will inform the capital investment to ensure that high specification learning environments are built to meet learner needs. The audit will identify any workforce remodelling and development required to meet the vision and entitlement. At KS4 it is anticipated that by 2013 up to 40% of learners will be studying on one of the 17 diplomas available to each year group of 1500 learners. Existing providers will plan for the impact of this on their future resources modelling and consider which curriculum options they are best placed to offer learners in the Borough.

BSF investment will effect not simply an improvement in student experiences and outcomes but the transformation of teaching and learning. For that reason there is a shared understanding among Heads of the schools and the College Principal that such planning is taking place. This will underpin the LSC's investment plans.

The proposed model is underpinned by the findings of the LSC's Strategic Area Review carried out in 2006 as well as the deliberations of the 14-19 Strategic Partnership. To that extent there is established synergy in the thinking of the LSC and the Authority informing their respective investment programmes. It offers a critical mass of students offsetting demographic fall in roll by attracting learners from NEET and those who currently choose to learn out-of-Borough. This ought to ensure both the broadest possible range of courses to offer to young people, maximising the potential for delivering a personalised pathway approach and value for money in course delivery; it allows for a pattern of management and strategic oversight that may minimise the impact on effective delivery of the complexities involved and it assures a truly Halton Borough Offer.

Working collaboratively the providers in the Borough will ensure that there is a "coherent 14-19 phase offering a rich mix of learning opportunities from which young people can choose tailored programmes and gain qualifications appropriate to their aptitudes, needs and aspirations. The 16-19 provision will be learner focused, high quality and offer real choice and diversity. That will

- provide high quality, natural progression pathways to Level 3 for all;
- drive up of standards;
- provide an attractive alternative to existing cross border provision; and
- provide access for all to the full range of provision (for some learners through more than one provider).



Each educational institution will ensure that every student has access to a personalised, tailored learning programme up to age 19. This becomes even more crucial in the light of the Government's plan to increase the age of those leaving full time education and training first to 17 and then to 18.

The re-launched Cronton Campus, which offers the bulk of the College's 40 AS/A courses, has had an increase of applications for this academic year. There is a plan to introduce IB in 2010 and Riverside is confident that its AS/A performance, while it has scope for improvement, compares favourably with Halton's existing 6th Forms. Riverside College is convinced that it can assure the broadest access to post 16 courses through economies of scale and extensive provision, for example the International Baccalaureate will be launched in 2010.

With regard to KS4 programmes, it is anticipated that by 2013 up to 40% of learners will be studying on one of the 17 diplomas available to each year group of 1500 learners. Existing providers will plan for the impact of this on their future resource modelling and consider which curriculum options they are best placed to offer learners in the Borough. This will inform the Halton 14-19 Education Plan for commissioning and delivery. (Appendix 7)

1.7 TO WHAT EXTENT IS THE AUTHORITY ENSURING EFFECTIVE INTEGRATION OF EDUCATION AND OTHER SERVICES TO SUPPORT DELIVERY OF THE EVERY CHILD MATTERS AGENDA AND OTHER RELEVANT CORPORATE PRIORITIES?

The priority focus of locality working in Halton is to:

- secure the ongoing engagement of young people in learning through improved attendance at school and in post 16 learning opportunities;
- improve education outcomes and reduce numbers going into NEET;
- reduce teenage conceptions;
- strengthen family and to prevent breakdown; and
- improve the health of children and young people.

In Halton all schools are committed to this approach and are now working in cluster arrangements on a geographical basis to deliver the extended schools core offer. Children's trust arrangements will secure improvements in outcomes for all children and young people through the delivery and effective targeting of joined up services on a locality basis. Building upon the foundation of Children and Young People Area Networks in 2005, locality teams are now being formed which draw on partner organisations and which enable the prioritising of casework for prevention and early intervention. Identifying and targeting needs on a locality basis supports the now effective commissioning of enhanced services to be delivered through schools partnered with their local children's centre.

BSF presents a clear opportunity to use school settings as a delivery vehicle for access to wider support services for children and families, and enable the holistic needs of children to be addressed. It follows that education outcomes for children and young people would improve as a consequence. To this end we will ensure that we explore, and where possible integrate potential funding to maximise outputs. BSF will provide multi-functional spaces in each school for educational support, health services and family support.

Extensive consultation with children, young people and their families has been undertaken in 2007 and when combined with the strategic needs analysis across the Borough and within localities significant priorities emerge including: Greater opportunities for family learning, Health advice and support, Improved access to Citizens Advice Bureau, after school childcare where transport links hinder access to provision, Careers guidance for parents, Parent/family support at the heart of the new arrangements is an integrated approach to commissioning driving integrated service development. Services will be tailored through the commissioning process to provide a tailored series of "Teams around the Child" depending on need.

Halton is progressing well towards delivery of integrated youth support and access to positive activities. A bid is being submitted for My Place capital funds to secure a 'youth hub' in Widnes to match the provision already developed in Runcorn. Additional planning is underway for the investment of the Youth Capital Fund Plus with the intention of it targeting the reduction of anti-social behaviour. A Directory of Positive Activities is now available. Integrated Youth Support is being developed on a town and then locality basis in accordance with the wider move to delivering core/universal services on a locality basis (i.e. Via Youth Centres or 'On the Streets' projects), but with the ability to target additional services and resources to 'hot spot' areas.

BSF investment will enable us to make significant improvements across all outcome areas through joined up planning by the Local Authority and its key partners; this will be made explicit in the new CYPP and reflected in our plans for our new and refurbished schools. Our extended schools strategy will also be further enhanced by exploring opportunities for co-location of services and further integration of our practice. Through BSF and the Primary Capital Programme investment we will provide opportunities for all children and young people to access equitable universal services alongside targeted and specialist services, delivered flexibly to meet individual and local needs.

Effective use of ICT will support the analysis of information, improved communication across agencies and more sophisticated planning and will under-pin progress towards the goal of seamless provision responding to local need.

Proposals for the future which will be incorporated in our BSF programme will include:

- the creation of flexible spaces that will be adaptable to changing needs of both school and community users, including targeted youth provision and multi-agency intervention rooms – able to accommodate activities requiring large and small spaces; with sufficient height to accommodate health, social care and employment related activities; with ICT and broadband access to accommodate interactive service access and electronic "sign-posting" to vital support and services;



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- to move towards a common technology platform and architecture across all ECM related activities to ensure that seamless, secure and appropriate access to child-specific data can be harnessed by all relevant and identified stakeholders;
- creating multi-purpose, integrated building designs that seek to bridge the community and school-based service delivery requirements to ensure that the welfare of all our citizens is actively promoted and supported – e.g. through linking exercise equipment and wellbeing programmes to individual “user” records;
- the extension of ‘smart card’ technology to monitor engagement in physical activity and sport for school and community use;
- the extension of ‘smart card’ technology in support of the 14-19 agenda and to ensure that physical access and location tracking (e.g. attendance) is correctly monitored and administrated; and
- ensuring that the BSF ICT programme provides for an open and flexible structure that can be adapted to harness new technologies, link into specific Agency-agendas and can be developed to meet regulatory and operational requirements of the wider Authority on a regular controlled basis.

We will develop our ICT solution to support the above priorities by providing systems that offer access to timely and relevant information in support of the work of the multi-agency support facilities. We will ensure that our proposals recognise the need for effective tracking of learner progress and support learning needs, particularly those with SEN and/or other disabilities and those with other vulnerabilities. We will build on current e-initiatives to engage children and young people in contributing to their communities, through the extensions of online forums and community groups. We will also extend our work in developing an e-safe environment and the promotion of acceptable uses of ICT systems

The PE, Sports and Culture Workstream are considering an area-wide approach to ensure equity of access to facilities for all learners and communities. The aspiration is to provide schools with access to creative venues/spaces, which can also be used to encourage the community and external groups to develop mutual and sustained partnerships with the schools. The aim is to provide high quality facilities that will enhance and extend individuals cultural, health and well-being providing enjoyment, engagement and lifelong participation for young people, adults and the wider community.

We will match strategic opportunities for individual school needs, visions and aspirations with community needs.

The approach will be collaborative, co-operative and co-ordinated. Good practice and expertise will be shared between schools and other cultural operators. All schools will have access to safe, multi-purpose, functional, creative, flexible spaces that can serve the needs of the community without compromising school requirements.

Networks of specialist facilities will be created across the Borough. Transport and access to these facilities are of paramount importance. Building designs need to be innovative, flexible and fully inclusive yet need to take into account out of school time access, including holidays, evenings and weekends.

In both Sport and Arts/Culture, there will be a determination to nurture outstanding potential through reduced formal curriculum and by formally adopting and supporting principles of JAE and LTAD through a collaborative approach. Infrastructures need to support any new facilities, with investment in coaching and classes, better exploitation of existing services (e.g. The Brindley, The Stadium, Tennis Academy, Kingsway and Halton Lea Libraries) and better links between schools and local clubs.

There will be a high quality PE curriculum based on Personal Learning and Thinking Skills. There will be a wide variety of PE, Sport, Dance and Leadership qualifications available to students at KS4 and KS5 (e.g. A level, AS level, GCSE full and half course, BTec National Diploma Level 2 and 3, New Sport and Active Leisure Diploma at KS4 and 5). There will be a high quality out of schools PE, Sport and Dance programme that involves formal collaboration with schools, local sports clubs, professional clubs and local universities. Consideration will also be given to the infra-structure requirements to support a collaborative approach (e.g. on-line booking system). There will be a high quality curriculum provision in Music, Art, Dance, Drama, Visual Arts and related new media technologies with quality provision for practice, rehearsal, performance and exhibition; fully equipped workspaces for workshop activities and the integration of cultural and creative industries, including stage management and technical skills as well as performance skills. There will also be opportunities for young people to access the ACE ‘Young Peoples Arts Award’ if appropriate.

Opportunities to maximise the benefits of the Governments National Creative Partnerships Roll-Out Programme for Schools of Creativity, Schools of Change and Schools of Enquiry will be maximised and synergised in line with BSF.

There will be access to modern library facilities that places libraries at the centre of a learning environment, giving access to multi-media facilities and the latest developments in ICT as a research tool. Provision of joint-use facilities will be considered to extend learning throughout communities and in particular to increase attainment in literacy and numeracy.

1.8 HOW DOES THE AUTHORITY PROPOSE TO CHAMPION THE NEEDS OF ALL PUPILS, INCLUDING THOSE WITH SEN?

- a) Removing Barriers to Learning by:
- b) Raising Achievement by:
- c) Developing Improvements in Partnerships by:

Halton believe that all secondary schools should take full responsibility for the education and care of all their learners, including those who are vulnerable and exhibit challenging behaviour. Accordingly, the BSF school designs to be commissioned will include space and provision for the inclusion, on-site, of all learners, including those following alternative and augmented curriculum provision. The BSF programme will provide significant opportunities to develop



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new school designs in both mainstream and special settings ensuring appropriate facilities and resources for all young people to learn and develop. The revised curriculum strategies are related to BSF challenge thinking and will aim to involve and engage all learners whose contribution will also be sought in the debate about design issues in their own schools. Throughout the BSF programme there will be a strong focus on improving the progress of vulnerable and underachieving groups, including looked after children, NEETs, ethnic groups, learners who live in our most deprived wards and super output areas, travellers, boys across all key stages, as well as meeting the needs of higher attaining learner.

Halton is committed to providing the best possible learning experience for all children and will further promote inclusion through personalisation. BSF will allow the authority to co-locate services and facilities to promote inclusive learning and reduce the need for segregated provision. We recognise the benefits of maintaining first class specialist provision at the same time trying to ensure that every child could have their needs met in a mainstream setting. Additionally it will provide increased access to a broad and balanced curriculum and enable extra curriculum activity to be more effectively resourced to deliver age appropriate experiences. BSF will provide the opportunity to allow the development of flexible models of support and delivery between secondary schools, special schools and other providers. To help delivery this integrated co-located model we will have to use ICT solutions creatively to achieve our vision

BSF will provide the opportunity to develop a more coherent continuum of provision across the mainstream/special schools spectrum. Additionally through BSF we would seek to ensure that all our secondary provision is designed to provide barrier free access to all or ensure that all provision is designed to enable barrier free across secondary provision (and beyond). As part of a continuum for supporting learners with more challenging behaviour, specialist complementary provision will be developed. This provision will be flexible enough to allow the transition back to mainstream. Halton Schools have worked proactively on reducing permanent exclusion however we recognise the need for a small Pupil Referral Unit. This ensures that we can meet the needs of those learners for whom a school setting is not appropriate at a particular point in time to ensure the broad and balanced curriculum for PRUs. This will be enhanced through the use of technology to secure access to a full mainstream curriculum.

ICT will be an enabler in providing improved access to all learners to opportunities throughout and beyond the Borough. In addition ICT will be adaptable both physically and in content to meet individual needs. ICT will be used to engage learners who have been traditionally hard to reach through new and exciting content delivered through the VLE. We will also explore how ICT can be made more accessible to all families to bridge the digital divide. In Halton we are committed to providing the best possible educational experiences for all children and young people, including pupils with learning difficulties and disabilities, pupils who are looked after, have English as an additional language, are from ethnic minority backgrounds, pupils who are gifted and talented and all those who are disadvantaged in any way. We will promote inclusion further through personalisation.

We will ensure that vulnerable and at-risk groups are fully involved in the process of development and design for rebuilding, remodelling and refurbishing our schools. We will do this by engaging with them through Halton Youth Parliament and other potential target groups. ICT will allow us to consult with these groups using interactive voting systems in order to achieve reliable capture of data that reflects the student voice. We will ensure that pupils who are identified as “gifted and talented” achieve their full potential. BSF investment will provide spaces and technologies to ensure that individual needs are identified and met through appropriate stimulus and challenge, encouraging our most able pupils to learn without limits, collaborating with other Gifted and Talented pupils within Halton and beyond.

BSF Strategy Attendance and Behaviour

Secondary Absence in Halton has improved significantly over the last four years. However Absence still remains a significant barrier to learning in some parts of the authority. Three of the High schools currently have Persistent Absence above the DCSF threshold of 7% and the overall target of reducing Persistent Absence to 5% by 2011 is a challenging one.

Much of this improvement can be attributed to the strength of the partnership work that has been established between schools and the Authority and by developing multi-agency response to Persistently Absent pupils, recognising that PA pupils have a high probability of going on to be part of the NEET cohort. Now that the overall authority statistics on absence are much improved there is the opportunity to focus in on those communities where absence from school is still more common. Our analysis of Persistent Absence by wards identifies the communities that will be served by the new academy and some of the inner Widnes wards need to be a particular focus. This aligns well with BSF developments within the Borough and will be reflected in a multi-agency strategy linked to each of the schools taking pupils from wards that have historically higher levels of pupil absence.

The number of pupils permanently excluded from schools in Halton has reduced over the last four years. This reflects the development of a partnership between schools and the Authority and the development of diverse quality assured alternative curriculum pathways within the Borough. These can be accessed by schools for KS4 pupils who are at risk of exclusion linked in to 14-19 developments and a Borough wide strategy to address NEET. These developments will continue and support the objectives of BSF. Whilst historically Halton has had a relatively large Pupil Referral Unit population, the development of alternatives to exclusion and preventative support going into schools at KS3 is being successful in reducing the number of exclusions. This is giving opportunities to recycle funding from making provision for relatively high numbers of excluded pupils to preventative approaches.

BECTA requires that by 2010 administration data (e.g. attendance registers etc) is available from within the classroom. We are investigating the ‘SIMS Learning Gateway’, which is currently in development, to deliver web access to the SIMS data to both teachers and parents.



EAL

In the past the number of EAL pupils in Halton has been very low but this number has increased significantly with the expansion of the European Economic Union and an increase in overseas students coming to study in the Borough, with their families. Provision has been developed to support schools with EAL in partnership with one of the High Schools that has a language specialism. This provision is flexible and is able to adapt to variation in the numbers of pupils requiring EAL support as it is very difficult to predict future numbers.

All new schools should be fully accessible to disabled children and to secure opportunities for inclusion. This will require a commitment in excess of DDA that takes account of the space requirements to accommodate disabled children as well as the adaptations required and accepts that these spaces and adaptations are protected from other use.

1.9 WHAT CHANGE MANAGEMENT STRATEGIES ARE IN PLACE TO ACHIEVE THE AUTHORITY'S BSF VISION (INCLUDING CONTINUOUS PROFESSIONAL DEVELOPMENT (CPD) AND WORKFORCE REMODELLING IN SCHOOLS)?

Halton's Vision for Education is integral to the change management processes. Partnership groups, with membership including Union and Authority representatives, are well established and discuss workforce development issues under a BSF standing agenda item.

The Authority's change management strategy (Appendix 20) identifies current strategies and activity in place and identifies activity to be undertaken to deliver the change outlined in this SFC.

Regular meetings have been held with schools to provide information and consultation on all aspects of programme development. All headteachers and their leadership teams, including Chairs of Governors and business managers have participated and this has assisted the development of school visions and draft strategy for change plans. Education consultants have also been engaged to work with individual schools on their draft change plans and to consult with young people, staff and governors.

The Authority's proposals for school reorganisation to address aspects of learner attainment and raising standards will require detailed planning and activity. The Authority will therefore identify specific capacity to support these proposals and will work with schools, communities and partners to draw up a detailed action plan to facilitate this process.

Specific activity to support change management as the programme develops includes:

- a distributed leadership programme focusing on managing change and learning in the future, which is scheduled for delivery throughout the year. The programme caters for all levels of leadership, including senior, middle and aspiring Leaders, and has been developed in collaboration with neighbouring Authority's through Halton's active membership of the Merseyside Learn Together Partnership (LTP) and its links with the regional provider of NCSL courses. In addition, there is an established succession planning group that is supporting transformation by examining the role of leadership capacity in schools and has delivered a programme of targeted support for NPQH graduates who are seeking their first headships. This was funded by the NCSL following the submission of a successful bid from the Authority and its participation in the Tomorrow's Leaders Today initiative.
- aligning the SSfCs with the BSF programme and ensuring that schools are adequately supported in delivering their School Change Plans (SCPs). Additional capacity has been provided to assist and support school leaders in developing their individual SSfCs. Schools will supported in the development of their SCPs and integrate them with the schools' existing development planning process. These will then be collated and analysed at an Authority level to develop a programme of support, events and visits that address common themes, and aligns with the Authority CPD processes. This process will be subject to review and reported into Project Board
- supporting capacity planning: the Authority has specific and accurate data analysis on workforce planning and age profiling which is made available to schools. This complements the 'population-centric' approach to workforce planning that Halton's Children's Trust is currently facilitating with a series of multi-agency groups.
- exploring and building on collaborative work including mentoring, shared appointments, work shadowing, highlighting skills shortages and potential areas of development along with appointments of pools of staff in shortage areas. Consultant Heads will continue to work alongside Authority partners, SIPs and Academy sponsors to provide professional advice to new headteachers.
- consultants supporting schools will be trained to deliver the change management model and materials in a 2 stage process, firstly with the Senior Management Team and secondly with the whole staff
- the development of an individual approach to change management with each school reflecting individual circumstances and supported by the BSF SIPs. Consequently, each school will identify and analyse change management issues and develop options to implement change. In each school a 'Change Team' will be established with senior leadership representation looking at curriculum planning and innovation. Change management work within each of the schools will also involve close liaison with the Extended Schools and Workforce Remodelling Advisors, whose effectiveness in delivering the tranche training programmes on the National Agreement resulted in Halton's designation by the National Remodelling Team (NRT) as a 'light touch authority' for monitoring purposes.
- delivering the change management course to Authority officers involved in BSF, to ensure they are aware of and understand the Change Management model. Change Management has been included in the Authority's training and development programme available to all employees.
- further developing the Authority's Continuous Professional Development Programme (CPD) for the whole-school workforce and its multi-agency partners through central, school-based and on-line distance learning packages. This will include the provision of training and support to enable all staff to use ICT confidently in the promotion of effective learning. Through this support learners will be able to operate with greater independence, inside and



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outside school session times, access a wider and diverse curriculum, monitor and assess progress, diagnose areas of weakness and make an appropriate response. Meanwhile, staff will be encouraged to engage in collaborative learning and to become life-long learners through links established with local universities via innovative undergraduate and masters-level programmes delivered by the Authority, such as 'Developing multi-agency perspectives through child development'.

Staffs in schools are our most important asset. We need to retain and develop our experienced workforce to make best use of their skills and expertise. Therefore it is important that we manage the period of change as sensitively and meticulously as possible. This work has started and was spotlighted by our recent 4Ps Gateway as good practice. Halton will be working with schools and other stakeholders to provide strategic support for new methods of management and curriculum delivery. Key to this process are the changing roles of all staff within schools and particularly the key roles of senior and middle managers in managing change and developing a clear transformational agenda.

1.10 HOW WILL THE LOCAL AUTHORITY HARNESS THE OPPORTUNITY OF BSF TO DRIVE DOWN CARBON EMISSIONS FROM SCHOOLS AND PROMOTE SUSTAINABLE BEHAVIOURS AMONG PUPILS AND THEIR COMMUNITIES?

Energy usage will be minimised through a green travel plan (minimising student travel through the effective use of ICT), intelligent building management system (maximising the efficiency of heating and ventilation systems including zoning to allow for partial building usage), sensor control of lighting, spaces being illuminated when necessary, real-time readouts of energy and water consumption and carbon output with indications of targets to be reached and progress in reaching them. The building monitoring systems will be available for curricular use to provide learning opportunities for young people to better appreciate sustainable activities. We will explore funding opportunities to promote the use of reusable technologies as further enhancements to the curriculum,

The Authority's strong commitment to sustainability will be fully reflected in its outline business case (OBC) for BSF. In particular:

- we will seek, through the intervention and expertise of our procured ICT partner to effect green-computing wherever practical and to set appropriate targets for technology-related carbon reduction for the Authority and all schools.
- we are committed to dynamic waste reduction and will mandate a strongly waste-reductive print and reprographic solution across our schools; and
- we will ensure that all practical and positive recycling of ICT equipment and electronics will be a key element of the ICT output specification and ultimate service deliver plan – including seeking to recycle hardware throughout our communities and public access spaces and to reduce the amount of material that eventually is disposed of in landfills.

We will evaluate ICT responses in terms of their eco-credentials – looking for demonstrable environmental policies around virtualisation, power consumption reduction, impact assessment reporting and a global ethos towards minimising the impact of technology on our environment as standard and ensuring that these comply with Government guidelines and targets around disposal.

The development of the BSF programme will afford schools a unique opportunity to enhance the curriculum in a number of subject areas and the development of sustainable approaches will form a key aspect of this. Furthermore the new and remodelled buildings will provide a valuable learning resource in their own right offering students to a real-time resource to study the impact of the building's usage on power and water consumption, linking actions directly to the study of sustainability. External spaces will offer a range of opportunities further enhance the curriculum.

At a subject level Design and Technology will allow young people to be assessing products in terms of sustainability, researching and thinking about the use of renewable sources or exploring alternatives to less sustainable materials within their own design and making briefs and beyond into the real world.

In Geography young people will engage with the key concept of 'environmental interaction and sustainable development', exploring sustainable development and its impact on environmental interaction and climate change, environmental quality (conserving resources and landscapes and preventing environmental damage e.g. Impact of landfill if we don't recycle). They should also be having an opportunity to participate in informed responsible action, how geography has meaning and relevance to their own lives, carbon foot print, recycling studies lends themselves perfectly. It should help them make informed and independent decisions and take action both at a personal level and as a citizen in society.

In Science young people should recognise the importance of sustainability in scientific and technological developments recognising the needs of current generations without compromising the ability of future generations to meet their needs.

The non statutory PSHE Economic wellbeing and financial capability framework encourage teachers to provide the opportunities for young people to learn about contemporary issues in work, for example sustainable living and ethical investment, both of which support the sustainability agenda in the classroom



2 SECTION 2: ADDRESSING KEY ESTATE PRIORITIES AND PROJECT PLANNING

2.1 OUR PROCUREMENT STRATEGY

At its meeting on 13 November 2008 Halton's Executive Board agreed that it would procure a Local Education Partnership (LEP), to deliver our BSF programme and to procure an integrated managed service to deliver ICT to schools. This approach has been agreed as set out in the Strategic board paper contained in Appendix 11.

We have also committed to use the PfS standard documentation in the procurement process, subject to minor variations to reflect project specific issues, including:

- Template PfS Procurement documentation (ITN/ITCD)
- template output specification for PFI, Design & Build and ICT;
- the Strategic Partnering Agreement;
- the LEP Shareholders' Agreement
- the Shareholders' Agreement;
- the PFI Contract;
- the Design & Build contract;
- the ICT Contract; and
- Voluntary Aided School or other back-to-back agreements, where required.

This commitment is set out in the Executive Board paper dated 13 November 2008 in Appendix 15.

The local LSC is represented on the Strategic Board and has been very supportive of the Authority proposals. The Authority has explored with the LSC the possibility of joint procurement for FE capital projects but a suitable opportunity has not been identified at this stage. Discussions are continuing as part of our work to identify the scope of the LEP.

It is currently envisaged that the services to be provided by the LEP could be:

- PFI provider for the operation of possible new build schools
- Facilities Management (FM), provider for PFI schools
- Design and Build contractors for the remaining schools
- Design team for all schools; and
- ICT managed service for all schools.

At this stage, we anticipate that catering will not be included within the FM.

For the design and build schools, it is important to take a consistent approach to FM services and avoid creating a 'two tier' estate. The current position is that schools purchase a range of hard and soft FM services from both the Authority and private sector providers. The Authority considers that there may be potential for greater opportunities and efficiencies if all hard FM services were delivered through a LEP model approach. We are therefore currently considering this further, and are identifying existing expenditure on schools maintenance in order to produce properly funded FM proposals for consideration by potential private sector partners (PSP).

The Authority is undertaking a formal options appraisal for early consideration of any wider services that could be included within the LEP. An initial workshop with senior officers from across the Authority, supported by Beechcroft and Grant Thorntons, is scheduled for December. The appraisal will be completed before the end of the year, and the results fed into preparation of the OBC and our OJEU notice. The Authority recognises the importance of ensuring our proposals are acceptable to the market. Initial preliminary discussions have taken place with a couple of recognised companies in the BSF field. We have arranged to hold a soft market testing event in January 2009 to assess the level of interest in Halton's programme. This event will be followed by individual meetings with potential bidders, including ICT companies, and a more formal bidders' day Spring 2009.

The wider market management strategy links into the programme's communication plan which prioritises the marketing of the programme to the commercial sector to ensure that we attract the highest quality of potential bidders. The Authority welcomes the widest possible interest in our programme from high quality bidders and consortia.

2.2 ASSESSMENT OF EXISTING ASSET BASE AND PUPIL NUMBERS

Assessment of Existing Asset Base

The existing asset base in Halton Schools ranges in age from the 1930's to the present day although the majority was constructed from the late 1950's through to the early 1970's. There has been some investment in recent years, mainly funded through school amalgamations and the Targeted Capital Fund (namely Sts. Peter and Paul and St. Chads), but a significant amount of the estate buildings are in poor condition and requires investment.

Whilst the vast majority of buildings appear to be structurally sound, due to the age and method of construction of the majority of the estate, many buildings are thermally inefficient and require their mechanical and electrical infra-structure to be upgraded and will thus not meet one of the key priorities set out in the Authority's Strategy for Change (part 1); to be energy efficient and sustainable. Each site also faces serious challenges in terms of accessibility and suitability issues, which in their current form and layout will not enable either the Authority's, or individual schools to realise their Visions or Strategy's for Change. (See Appendix 12)



Assessment of Condition

The Authority Asset management data includes for each school:

- measured surveys,
- asbestos surveys*
- Annual condition appraisals and overviews
- Legionella risk assessments

The information does not include The Bridge / Gateway establishment, as this has only recently become part of the education estate, having previously been used by the Authority for other purposes.

*Asbestos surveys were only available for nine of the establishments.

Having reviewed the Condition overviews, visits were made to all of the school sites on the 7th and 8th July 2008 by the Authority's Technical Advisors, which included a brief visual inspection of the buildings, noting easily visible condition/ structural items, including most of the mechanical and electrical plant.

Condition Assessments in line with the DCSF guidance contained within Asset Management Plans, Section 3: Condition Assessment (<http://www.teachernet.gov.uk/doc/3344/AMP%20Section3.pdf>) were unavailable, therefore a review of the combined information detailed above was made to provide a summary of the condition of individual blocks distinguishing expenditure required to maintain the condition of elements of the buildings in bands of 0-5 Years, 6-10 years and 11-15 years.

This analysis, together with information gathered when the schools were visited, gives a fair indication that the estate is mainly structurally sound apart from some mobile units and evidence of cracking in some sports blocks. The overall condition is 'good' in parts due to recent rebuilding, but a consistent finding across the estate is that significant investment is needed to bring the condition up to acceptable levels. This is notwithstanding any investment to improve the energy efficiency of the buildings to ensure that future lifecycle costs are minimised, and the Authority's carbon footprint is reduced.

The condition items identified generally include, but are not limited to:

- Roof coverings in need of replacement
- Mechanical and electrical plant or infrastructure in need of replacement
- Windows and doors in need of replacement
- Presence of Asbestos

This is in addition to accessibility issues and thermal efficiency problems identified for all of the schools. Once the condition of the estate was fully understood, options for each site were developed which took cognisance of the condition of each block and the individual schools Vision and Strategy for Change.

Suitability

The Authority commissioned 'Suitability Surveys' were for each mainstream site in 2004. To evaluate suitability of the assets, criteria based on the educational practices of the time were used. These criteria pre-date the transformation agenda and findings contained within it do not therefore reflect suitability in the context of the Authority's vision or individual school's aspiration to implement the vision at a local level.

Nevertheless, the findings of the Suitability Surveys were consistent with views formed during more recent visual inspections; even when suitability was measured against criteria based on historic learning practices and space standards, suitability levels are variable across the estate. The highest scores were attributed to The Bankfield School and Wade Deacon and the lowest scores were attributed to Halton High.

Special schools which were not considered within the scope of the Suitability Surveys are discussed in more detail in the section below 'Accessibility' but it is evident from the Asset Management Plan data, visual inspection of the sites and buildings and dialogue with the schools themselves that they each fall well short of the basic levels of accessibility required to meet what might be considered 'reasonable' under the terms of the DDA 1995. More importantly the Authority's ability to implement a transformational suite of opportunities for young people with SEN is severely inhibited by poor accessibility in both mainstream and special schools.

There has been some recent investment in some schools, for example Cavendish and St Chads, and newer facilities will certainly go further towards meeting the 21st Century learning practices which are aspired to, but even the most current works will not fully deliver some of the strong themes of transformation that the Authority aspires to. Our recent analysis has focused on the ability of the school buildings and sites to meet the Authority's BSF vision for transformed learning.

Key themes inherent in the Authority's vision and strategy are:

- *Personalisation of learning and the development of self management skills amongst learners* – to fully transform to Borough-wide culture such as this, internal space needs to be highly flexible and adaptable, able to respond to individual learning styles and a wide range of size of groupings. Assessment of the relative agility of the stock at each school was made. Most building stock pre-dates the personalisation agenda and restricts the schools to conventional school organisation and pedagogy of 30 students and one teacher. Much of the existing stock can be remodelled to address this but in some cases, structural elements and existing condition will inhibit full realisation of this goal.



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- *Inclusion and participation of learners with SEN and disabilities*– to implement an ambitious agenda in which all learners have opportunities to secure the benefits of both the mainstream and special school estate, the specification for access standards must be considerably higher than the minimum regulatory standards require. There are very few parts of the estate which meet these criteria even within the Special schools themselves. This is discussed in section below.
- *Every Child Matters* – the five outcomes of ECM require healthy and safe environments in which young people can enjoy and achieve. There is a consistent shortfall in the ability of basic heating, ventilation and other services across the estate making the schools basic environments unsuitable for delivering learning. Poor security is a significant issue in particular schools, for example Halton High, Fairfield and Ashley; however all schools experience significant difficulties throughout the Borough.
- There is a strong appetite and commitment across the secondary estate and within other children’s services agencies to work together and exemplify practices in working together through the ECM agenda on school sites. This cannot be implemented on most sites due to unsuitable facilities and insufficient GIFA.
- *Workforce remodelling* – staff accommodation is consistently poor and inflexible inhibiting the ability to support, coach and mentor students in new pedagogical methods
- *ICT and media rich learning* – environments predate an agenda where ICT infrastructure contributes to new ways of learning; buildings are ill-equipped and inflexible making it difficult if not impossible to implement a flexible and inspirational personalised curriculum and
- *The engagement of an entire community in learning* – schools have made excellent in-roads into developing life-long learning opportunities and building social capital within their respective local communities but these are despite rather than because of suitable accommodation. As they are, the appeal of the buildings is low; their general appearance, condition and in some cases in-coherent layout create a reticence within communities to participate and new opportunities which require upgrading of facilities cannot yet be provided.

Accessibility

The Authority’s vision is to enable all learners regardless of their disability status to access the right school placement and the total range of opportunities whether in a mainstream or a special school or delivered between the two estates. To allow such agility of response to individual learners needs within the estate, standards across the all schools will need to meet current best practice and

The Authority’s inclusion strategy is consistent with its duty (DDA 2006 duties) to promote good relations between disabled and non-disabled students.

Halton’s aspiration that each young person should access the right opportunities whether within the special or mainstream estate, and both, cannot be realised unless the specification for accessibility in mainstream schools is raised to a much higher one than is required to meet minimum standards and realistically, to the same basic specification as that required in special schools.

On this basis, it is not the Authority’s intention moving forward that it simply address the deficit but to use the BSF investment to raise expectations of participation in future society and to explore the potential of the designed environment to radically alter perceptions and opportunity. Common standards of accessibility will need to reflect best practice and each separate environment be designed to respond to a new and inspirational learning agenda in full input from expert stakeholders such as learners and special school staff.

Asset Management data contains Accessibility Audits which were completed in 2003 across the estate and these comprehensively reviewed from a wide range of building user perspectives.

Most schools within the secondary estate were noted during the Accessibility Audits to require significant investment to allow the Authority to meet the requirements of the Special Educational Needs and Disabilities Act (SENDA) 2001 or 2004 duties the DDA 1995 which relates to the ‘removal of physical barriers’ and despite some works being undertaken on some sites in recent years, this largely remains the case. The Audits note consistent issues such as

- a lack of basic space to manoeuvre
- a lack of appropriate visual and audible information reducing the ability students with sensory and some learning difficulties to navigate the schools independently
- poor site legibility or coherence resulting in lengthy and counter-intuitive travel routes
- paucity of basic circulation width / area to enable independent locomotion through the building or no accessible access route at all, including in some instances no lifts
- poor acoustic insulation to enable deaf or hard students to participate
- a lack of basic specialist facilities such as accessible toilets / hoists
- poor thermal and ventilation controls
- inadequate parking arrangements including pick-up and drop-off facilities

It is particularly concerning that there are many examples of gross inadequacies in terms of accessibility even within the special school estate and basic requirements such as sufficient circulation space, level access, hoists and lifts are not met. Specialist facilities, for example the Hydrotherapy Pool at Chesnut Lodge are outdated and too cramped to be of real value. The ability and a blended multi-faceted team approach of children’s services professionals are implemented despite rather than because of the suitability of the environment.

Halton BC’s Pupil Projections and Place Planning for Secondary Schools for 2017/18

This pupil projection report in Appendix 13 sets out:



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- projections on the number of secondary places needed by 2017/18, and
- how Halton BC proposes to meet the demand for places within its existing schools and through the new Trust school and Academy Schools.

2.3 PRIORITISATION OF BSF INVESTMENT

Appendix 4 illustrates the phasing we are proposing for our BSF programme. The prioritisation criteria were established in discussion with our PfS Project Director and Project Sponsor and reflect the DCSF criteria of educational outcomes, free school meals, Attainment but also AMP condition/suitability and current occupancy levels. The prioritisation of schemes has been shared with all headteachers, who are supportive of the proposals. The phases allow for all PFI funded schemes (with the exception of a sample scheme) to be grouped and have been agreed in principle with PfS. Sample schemes have been identified as [XXXX] and [XXXX].

The consensus appears to be that three phases will be necessary to deliver the whole programme, with three or four schools coming on stream each year from 2012 onwards. Appendix 17 mirrors this sentiment but is only estimation at this point in time. In the shorter term, we will work closely with schools to optimise Devolved Formula Capital (DFC) and other resources, whilst also avoiding prejudicing the eventual BSF solution.

Halton has agreed a "single wave" investment strategy with PfS, ensuring that there will be a continuous rolling programme. Schools in the later phases have spent a considerable amount of time working on their school visions and welcome the above proposals.

In general, it is anticipated that ICT investment will follow the phased construction and refurbishment programme. However, as the ICT contract will be well established by the time later schemes come on-stream, we will look at opportunities to bring forward ICT investment where possible. For example, we will consider the possibility of creating an ICT 'classroom of the future' in one of the later schemes, as part of the overall teaching and learning change management training programme.

The key priorities for the ICT investment which Halton will make through the course of the BSF programme are as follows:

- Formalise the integration of open access to technologies in both service provision models and the design and fabric of the schools;
- Ensure equality of access to all learners – regardless of age, stage or special needs;
- Ensure all teaching professionals are supported in the development of new and innovative models of working through targeted training and continuous professional development;
- Ensure that links to local communities and key external stakeholder groups (e.g. parents / carers) are formalised and developed in line with key policy and national strategies;
- Ensure that personalising the learner experience is supported and where necessary, driven the opportunities and functionalities of the new ICT solution;
- Ensure the programme builds on the legacy investments in a common MIS and Learning platform which all schools are currently developing and engaging with; and
- Support new models of learning and innovative practice through dedicated support and funding for new technologies and programmes of work to be realised in partnership with local businesses, the CLC or individual school programmes.

2.4 ESTATE OPTIONS

Potential disposals, site acquisitions, amalgamations, new schools etc

The proposals for the school estate fit with the Authority's key priorities set out in its Strategy for Change 1 to reduce the number of secondary schools and co-locate Special Schools onto mainstream sites. They are also supported by the consultation that has been undertaken with stakeholders and the community so far.

The existing 12 sites will be rationalised to 9 through:

- Closure of Fairfield onto the Wade Deacon High site.
- Co-locating Ashley Special school onto the Wade Deacon High site
- Co-locating Chesnut Lodge onto The Bankfield Comprehensive school site.
- The federation and Trust Proposals for the Grange comprehensive school and the Grange Nursery, Grange infant school and the Grange junior schools

This will leave the following sites for potential disposal:

- Fairfield High
- Ashley Special School
- Chesnut Lodge Special School

A feasibility study to investigate the possibility of creating a new Academy on the Wharford Farm site to replace Halton High, has shown that the existing site is the most effective location when Technical and Environmental factors are taken into consideration.



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The Bridge / Keystage 4 Gateway site has been identified as having some suitability consideration and that it is a lease building, and whilst the Control Option at present is to refurbish the existing building, investigations are underway to consider move this facility to a different location that the Authority own.

Phasing of School Deliverability

In developing a phasing strategy, it has been important to ensure that the condition of individual schools alone is not the main focus in placing them “first in the queue” as current educational attainment needs to be considered. In developing a phasing strategy, the following aspects have also been considered:

- Ensuring that, as far as possible, works will not disrupt the education of pupils nor bring about a decline in attainment
- the requirement for the two sample schemes to include a Design and Build and PFI element
- the need to minimise temporary accommodation for decant purposes
- the need to take account of the declining pupil population.

The suggested programme currently involves three phases, which will ensure that the overall programme is contained to a reasonable period, whilst ensuring economies of the scale for the eventual selected bidder, and not putting too great a strain on their supply chains. Please see Appendix 4 to see the phasing methodology

Control Options

The control options considered for each school were generated based on different proportions of work types (classes). Works were classified as follows:

Do nothing – This includes areas which have recently been constructed or renovated in very recent building programmes. It is expected that these areas will still be suitable and in good condition when works to the rest of the school are undertaken under the BSF programme.

Light Refurbishment - This includes internal areas which appear to be in good condition and are either suitable in their current format, or able to be easily “re-labelled” to alternative areas under the BSF programme through minimal expenditure to address condition issues arising and undertake minimal improvements to windows, doors, floor coverings, roofs and ceilings.

Refurbishment / Remodelling - This includes for works internally to take account of all condition issue, largely replace all mechanical and electrical plant infra-structure and ensure that current statutory requirements and guidelines, such as BB101, are taken into account. It will also allow for areas to be physically re-modelled to bring about the Schools required Vision and Strategy for Change and allows for any necessary external works to improve access, parking etc to be done.

New Build – This includes area to demolish and replace any buildings which have been judged unfit for continued use due to the combined picture of their thermal efficiency, condition or suitability. It also includes for areas to be constructed to ensure that there is sufficient gross internal floor area for the projected number of pupils.

In considering all of the data accumulated for each school, including the results of initial surveys; planning briefs and schools individual visions, a range of options were considered for each site, with up to four being chosen for each. The “do minimum” option, which would address outstanding condition and accessibility issues, was discarded as it could never bring about the transformational change that is demanded through the BSF programme. The remaining options were evaluated against individual criteria developed for each school, which took account of their individual requirements for the programme and future vision, as well as the Authority’s need for deliverability and affordability.

The option which scored the highest has been selected as the ‘Control Option’ for each school, to be taken forward and developed at the next stage. It has also been costed to assess the overall programmes current affordability and value. The results of the evaluations and summary sheets detailing an overview of each site, inc. issues and abnormalities identified and key educational priorities can be found at Appendix 14.

2.5 THE ICT MANAGED SERVICE

BSF provides the Authority and schools with the opportunity to build on the significant progress already made in ICT and e-learning and deliver the necessary resources to achieve significant Authority-wide transformation of teaching and learning and the processes that support them. We know that ICT is key to schools achieving the goals articulated in their own Strategies for Change and as such we are committed to reducing the burden of technology management and support and releasing potential and capacity to support curriculum innovation, the management 21st century learning and change management.

In determining the shape and scope of the ICT managed service we will ensure that our solution is innovative and supportive of transformation, while offering sustainability and value for money. We intend to test our proposals with the market in the period leading up to OBC, to ensure that there is broad acceptance and will prepare market briefings as part of the OBC process.

The geographic complexities of movement throughout the school’s estate are a concern at this stage as the bottleneck of the Mersey Bridge may impede the delivery of managed services where resources are aggregated and peripatetic. In addition there is the difficulty of current connectivity to the two locations via a single site. This is alleviated currently by the use of fibre links running below the bridge and is something that may need to be replicated in the new service provision. As such, our model of service delivery in support of the schools may well require two hubs to address the needs of Runcorn and Widnes – with floating resources being managed on a per-incident basis.



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Whilst the area covered by the Authority is compact, the realities of the dualistic nature of the two towns and communities will need to be considered and will have a wider impact on 14-19 agenda delivery, learner mobility and the access to key sites and resources as part of the wider learner entitlement. We will therefore factor this into the market testing we broker in advance of OBC and will invite responses around how the split nature of the locality provides opportunities and challenges to service delivery.

The need for a highly flexible and adaptive service is therefore self evident given the potential issues created by potential mobility issues. We will define therefore a range of KPIs that the MSP will be required to respond to that allow providers to demonstrate their ability to resolve a range of likely scenarios – including operating two distinct services on either side of the river.

We are developing a strategy that involves all key stakeholders to maximise the benefits of new investment in ICT for our schools. This will include defining our interim service requirements – such as early guidance on equipment purchases that will generate significant benefits to schools in the short term and can then be migrated into newly built or refurbished schools as valuable and cost-effective “legacy” equipment. We are also advising schools on the most effective arrangements during the intervening period and are actively exploring, with schools, collective solutions, including leasing.

We view the phased nature of the procurement as an opportunity to deliver significant early benefits for all schools regardless of where they sit within the timescale for the programme. It is our intention that the availability of interim support services are made readily available in advance of final contract signature in order to support the transformation of education service delivery from as early as practically possible. Our proposals for an interim solution will allow for the early adoption of services should schools request them, ensuring that the transition to a fully managed service will take place as seamlessly as possible. These services will be made available to schools at not more than the cost of providing a full service to new schools. The Authority sees the value of a planned introduction of ICT assets into the new schools. This approach would help to manage user training and provide for a degree of gradual integration of new services. We are also in the process of defining the scope to which our primary schools can access this new managed service and will resolve the extent of this in the Outline Business Case.

The transition from the current model of support which the schools have developed will be mapped during the lead into the OBC submission – and will provide a baseline for evaluating the operational and support responses from bidders. As all schools have different current models and levels of both requirement and resourcing, this mapping exercise is critical to define a phasing programme and to establish what the minimum level of these interim services will be. Building on the work exemplified in other Authorities, there are clear benefits to early service commencement but this needs to be structured in a manner that allows for a robust and operationally sensitive transfer of function from the schools to an external provider.

Work has started to identify current school expenditure on ICT services and all schools will complete the BECTA Self-Review Framework in advance of the OBC being submitted. This work is operating in parallel with the programme of school governing body briefings that will articulate the need to fund the on-going costs of managed services. By drawing on the experience of our external consultants and the revised models proposed by PfS and BECTA, we anticipate a revenue funding requirement in excess of £160 per pupil – and will work to define an annual contribution that supports a transformation and robust managed service offering.

Feedback thus far has indicated a broad consensus on the need to establish a dedicated revenue stream. We intend that this will be confirmed in formal agreements with schools in time for the submission of the OBC. Our schools already have high levels of ICT equipment and are well equipped to manage the change with little disruption. However, this provision is currently non-standard across the estate –with local variances in how support services are delivered – ranging from internal support functions through to locally procured 3rd party support offerings.

In the lead up to OBC, these will be mapped and a high-level transition plan from “as is” across “to be” will be defined. We will, in conjunction with our advisors, drive the process forward through procurement and challenge to Bidders in order to address these issues as part of Competitive Dialogue. We intend to develop a core set of services based on a common set of performance standards for schools, teachers and learners. In determining standards we will extend the scope beyond the BSF Schools to ensure that services support our ambition for an area-wide solution. These will reflect local priorities, in particular supporting the implementation of specialised diplomas, access to specialist provision, uniform adoption of inclusion of all learners across our school sites and collaborative working across schools and other education providers. In addition we will also develop a series of staged services into which schools can ‘buy’. Working together with the external ICT Consultants, schools and other stakeholders, we will provide challenge, scope and specialist knowledge to assist in the delivery of ICT services that allow schools to meet their individual needs. We will also allow schools to procure their own additional services, thereby ensuring any solution is flexible and scalable.

School visioning is seen as key to informing the direction of our plans for the future use of ICT. We will ensure that proposals help to underpin key local agendas including 14-19 provision, personalisation of learning, and 24/7 access to learning support and resources. We will also require that the proposed solution supports the Authority and schools by providing links to a range of learner management and other management information systems used throughout the locality. Our ICT Consultants have also been tasked to assist us in assessing the current ICT estate in preparation for the major transition that will be required through the programme. Using the BECTA Self Review Framework, BECTA total cost of ownership (TCO) template and other tools, we intend to ensure that a comprehensive snapshot is captured, recorded and available to inform the development of any managed service contracts. As such, our education and ICT advisers are working jointly in the schools to ensure that the school visions and individual strategies for change reflect an integrate model of education service delivery that encompasses the supporting technologies and services that will underpin a 21st century education in Halton.



2.6 AFFORDABILITY

Capital Affordability: Our analysis of capital affordability has been based on the revised funding guidance dated September 2007. This analysis reflects a shared understanding between the Authority, its advisors and PfS of the Funding Allocation Model (FAM). We have established a funding model for affordability purposes based on the FAM allocations, noting that the sums in the FAM are not hypothecated to individual projects. The available funding for capital expenditure at the reconciliation date produced by the FAM is £[X]m (Appendix 16]). This funding covers building costs, site costs, fees, an allowance for abnormals, furniture and equipment and ICT passive infrastructure. Funding for ICT capital expenditure is in addition to these amounts and is explained in subsequent paragraphs.

A detailed analysis of capital costs for the high level options developed through working with schools is provided in Appendix 14. [Our work with the schools has confirmed that there is an affordable control option for each school contained within the overall resources available.] A summary of affordable high-level options using PfS rates is provided in Appendix 14.

The school rationalisation proposals necessary to continue to deliver the Authority's high aspirations and educational vision for continuation of the transformational learning have resulted in the achievement of a slightly higher proportion of new build than the assumed FAM split. This has resulted in a lower proportion of major refurbishment works being required to the schools. This approach has resulted in the Authority achieving an approximate [XX:XX:XX] percentage split across the estate, rather than the 50:35:15 assumed in the FAM. From the initial analysis it is evident that these options exceed the overall funding available (in capital terms), leaving shortfall of £[X] million.

The headline affordability position is based on a number of assumptions including; construction rates on a per square metre basis are as per the standard rates in the PfS FAM and site abnormals are assumed at the levels of the normal allowance calculation within the FAM. Consequently, the current affordability gap does not include at this stage, potential costs of abnormals. [An initial high level review has been undertaken by the Authority's Technical Adviser of estimated additional site abnormals (£Xm), the funding of which is subject to discussion and agreement with PfS, and off-site abnormals costs (£Xm) which will need to be funded by the Authority.]

The Authority anticipates that it may generate capital receipts from the sale of a number of schools sites as a result of the rationalisation process, in the region of £[Xm] subject to planning consent and market conditions. We intend to use the capital receipts as part of the contribution towards any abnormals not funded through BSF, based on our understanding of the funding guidance.

The technical costings included within the project may be subject to inflationary pressure as a result of competing capital schemes in the market place, notably construction projects associated with the Olympic Games in 2012.

This existing gap between estimated funding and estimated costs means that great care will need to be taken to avoid 'scope creep' in the later stages of the project. Attention will need to be given to exploring options to reduce costs at all sites as the project proceeds to ensure that we continue to work on the basis of a range of affordable options, paying proper regard to educational priorities. Efforts will also continue to explore the possibility of additional funding.

ICT Capital Expenditure: The ICT capital costs are being developed through our work on the ICT vision and strategy. We will contain these costs within the funding allocated for ICT (£[X]m).

Halton Borough Council's Contribution to Revenue implications of PFI Projects: Currently, the high-level option analysis identifies [three or four] new build schools for which the appropriate funding route is likely to be PFI. These are The Grange, Bankfield and Chestnut Lodge (which will co locate as a two school on one site location) and possibly Halton High. Detailed financial modelling will be undertaken for the Outline Business Case that examines the overall value for money, provides an initial estimation of the unitary charge and assesses likely affordability of the scope of the scheme. These models will be refined and refreshed throughout the BSF process.

Contributions towards PFI unitary charges will be required from 2013/14. At this stage, it is difficult to determine the likely level of charges. In general terms, the final cost will be dependent on the service scope and client specification that is required by schools and the Authority to deliver the education transformational agenda. However, it should be noted that based on research undertaken by PfS in November 2004 ("Prioritisation and Forward Planning Information"), the Local Authority contribution could be up to £250 per pupil. The school contribution will reflect a proportionate share of the costs of the unitary charge relating to those costs that were previously met from the school's delegated budget and that would, instead, be met by the PFI contractor for the life of the PFI contract.

There are, however, indications from experience to date that levels of additional local authority contributions have varied in BSF projects. The Authority's position is that it will work to ensure that BSF will have minimal impact on its revenue budget. Costs across the BSF project will be monitored and contained to minimise the risk of any additional revenue contribution being required. If, despite this clear policy imperative, any additional revenue contributions were required we would factor this into our long term financial forecasting that prioritises school funding and reflects revised school requirements arising from the BSF programme.

The Authority has a strong tradition of working closely with schools through regular ongoing consultation programmes. This consultation programme includes discussions regarding the financial strategies and prioritisation of local school funding both with schools and through the consultation process. We intend to build on this successful partnership to allow schools to have full consideration of all key financial issues and to be fully involved in the development of the long term financial strategy and the reshaping of school funding for those schools within the BSF programme.

Halton Borough Council's Contribution to Design and Build (D&B): In order to secure the long-term future of the buildings procured via the D&B route we aim, subject to final agreement with schools, to adopt a managed 'hard' FM



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service for all schools delivered via the LEP. The managed service will offer a single tiered approach, which will include a funding contribution from individual schools. The Authority will be seeking for the LEP to demonstrate value for money such that the cost of FM and lifecycle for the D&B schools can be met from school budgets. [Agreement in principle to this approach has been secured].

ICT Funding: The FAM includes ICT funding of [£Xm] for ICT managed service as well as a formulaic £225 per pupil amount for building and connectivity work. The breakdown of these amounts per school is provided in Appendix 16. The £[X]m ICT funding will be used to further develop the Authority's existing Learning Platform, hardware and the infrastructure for the ICT managed service as outlined in section [reference to ICT section needed]. Our approach will be to fully utilise suitable legacy kit that already exists in schools to create a phased lifecycle approach to ICT. This will enable the schools' ICT equipment to be refreshed in phases rather than having to refresh across all schools concurrently.

The schools will make contributions to the ICT managed service. As we progress through the OBC stage the specification and cost of the ICT service will be developed further to provide greater certainty over the contributions required from schools. Agreement in principle to this approach has been secured.

Schools' Contributions: As highlighted in previous sections of this affordability section, [schools have committed in principle to contributions for FM and ICT]. To enable schools and the Authority to have confidence in the affordability of these approaches we are working with schools to achieve an agreed analysis of historic school expenditure in these areas. This will then be compared with the projected costs from our work to determine realistic expenditure levels for lifecycle maintenance and the ICT managed service, including refresh.

Balancing the Phases: Conventional funding versus PFI Credits: The preferred options at this stage include a combination of both PFI Schools and D&B. It is planned to deliver the Halton BSF programme in three phases. The construction of the sample schools is planned to start on site in 2011 with Phase 2 commencing in September 2011/12, and Phase 3 in September 2012/13.

[Overall Affordability of the Preferred Solution: Our initial analysis indicates that the proposed solution will be affordable within the funding envelope, subject to the assumptions made and limitations on detailed costings work undertaken at this stage. The Authority recognises the potential impact of abnormalities, both those to be agreed with PfS and those external to the school sites, which will need to be funded by the Authority directly. The Executive Member for Children's Services and Resources and the responsible Financial Officer have been made aware of, and have approved that the Authority proceeds with the project to Outline Business Case stage, following approval of the Strategy for Change 2. Work will continue to develop these projects, but with a requirement to demonstrate at every stage that projects must provide, overall, an affordable solution.]

2.7 CONSULTATION

At the core of Halton's BSF programme is Consultation and collaboration. Halton believe that effective stakeholder management is a vital success factor in the delivery of a transformational therefore has established strong links with its stakeholders. The complex nature of BSF means that there are many and varied stakeholder groups both internal to the client organisation and external to it. We have undertaken a stakeholder analysis and our communication plan outlines the key messages and engagement processes associated with each stakeholder group. Regular consultation and development meetings are ongoing, and will continue throughout the BSF programme, with all of the stakeholder groups and work streams. Regular meetings, publications and updates are and will continue to be provided to all stakeholders to both inform and gaining feedback. The mechanisms for BSF consultation has been established, Halton is committed to a continual process of dialogue with all stakeholders. Our consultation to date has been described as exemplar practice by the Gateway Team and the DCSF. A copy of the plan can be found in Appendix 5. This plan will continue to be revised and updated throughout the lifetime of the programme

All communication demonstrates the role of the BSF programme at the heart of local regeneration and highlights its educational benefits. Specific communications activities that have been undertaken to date, or are planned include:

- The establishment of a extranet portal (e-box) for use by the programme team, a range of stakeholders and longer term, by bidders for access to and exchange of information
- Establish briefings to Chairs of Governors
- Bi-monthly meeting with all Headteachers dedicated to BSF
- Learners' involvement has and will be vital to the success of BSF as a transformational Programme. To date Halton has engaged with learners to ensure their views are incorporated in our planning. Plans are underway to commission the Sorrel Foundation to carry out a series of workshops with it learners to consider the design principles that will be used in the competitive dialogue process.
- Milestone updates to Elected members through the Members briefing sessions
- Circulation of workforce issues to all schools agreed with all Trade Unions
- Regular update of the BSF website on the Halton website
- A workshop programme for key stakeholder including Elected Members, Headteachers and Governors, with sessions covering subjects as diverse as transforming the curriculum to understanding PFI.
- A BSF programme have used the Authority wide publication to promote BSF these have been circulated to every household in Halton

We are committed to ensuring that stakeholders, including the wider education sector (FE and primary schools) are fully engaged in the development of the BSF transformation programme. To facilitate this engagement a number of multi-agency thematic working groups will be established. Each of these groups is chaired by a member of the BSF Programme Team.



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There is a broad representation on the Programme Board from other internal Authority services including Development Control, Property Services, and ICT and Performance Management and external partner agencies. Internally, we continue to work closely with services including Highways, Property Services, Planning Legal and Estates who are actively involved in various work streams for the programme.

- External partner agencies and our wider external education partners are drawn into the process in a number of ways:
- The Strategic Board includes representation from key external partners including the LSC, Connexions and Catholic Diocese which represents the voluntary aided schools in the programme.
- Other external education partners are drawn into the process through our 14-19 Partnership.
- We continue to send regular updates to our progress to the Alliance Board which is chaired by the Chief Executive. Sport England and the County Sport Partnership are drawn into the process through our BSF PE, Sports and Culture PE Stakeholder Group.

We are currently in the process of a series of school and stakeholder events to raise awareness of the programme requirements and the volume of activities and effort required from each stakeholder group to meet the demands of this procurement. In the ICT work-stream, we have a series of planned workshops and events to offer opportunities engage with schools, learners and teaching professionals and will be seeking to hold a series of events where the wider community can be engaged into the process. We are also publishing a monthly newsletter focussing solely on the ICT related element of the BSF programme which will be made available to each of the schools as well as hosted on the HBC website.

Sport England are an active member of the PE, Sport and Culture Group to ensure that the BSF investment will provide the opportunity for the development of a holistic Authority approach to Culture and Sporting facilities. Communication with the Dioceses is maintained through regular formal meetings hosted supplemented by programme of meetings between the estate officers from both Children's Services and the Dioceses. Representatives of the Dioceses have also attended a number of key stakeholder events. Maintaining an effective relationship with unions and professional associations has been prioritised by the Authority. The Authority has worked closely with all the trade unions to develop and implement the BSF Workforce strategy please see Appendix 22. This group meet at least once a term to discuss progress and review programme developments that affect their members. Approval of proposals at Readiness to Deliver, Strategy for Change 1 and Strategy for Change 2 have been secured from these groups.

Internally the Programme Sponsor, the Operational Director for Business Planning and Commissioning, is responsible for maintaining corporate communications around BSF. The membership of the Strategic Board which includes the Chief Executive, all the strategic directors, Secondary Head Nominee, LSC Rep, PfS Programme Director, Governor Representative (Primary and Secondary), Health Authority, 4ps Advisor, representative from the PCT facilitates effective communication across the Authority as well as with key stakeholder groups.

2.8 MANAGING THE PROCESS

BSF Strategic Board - Sets and champions overall strategic direction and vision

Due to the importance of BSF to the Authority and its cross cutting nature the Senior Responsible Officer is the Chief Executive. The Chief Executive leads the BSF Strategic Board. The role of the Board is to provide the strategic steer for the Building Schools for the Future programme in Halton. The Board includes representation from a wide range of stakeholders to ensure that the programme is firmly embedded in the regeneration and renewal of Borough. The Strategic Board will report to Members as appropriate.

BSF Programme Board

The role of the Programme Board is to ensure that the BSF programme is delivered effectively and efficiently. The Programme Board ensures an internal focus to the work on BSF and provides an effective means for ensuring progress according to the timetable.

Delivery Team

The Delivery Team is responsible for the day-to-day delivery of the Building Schools for the Future programme. The Delivery Team reports to the Programme Board through the Programme Director or Programme Sponsor providing regular monthly reports on progress. Lead officers of the Delivery Team will be responsible for the delivery of a specific workstream within the programme as a whole. Leads will report back to the Programme Director on a regular basis on progress within their workstream. This team will ensure that BSF is fully embedded in all aspects of the work of the Authority.

Support Network

Halton has considered the resource needed to deliver the BSF programme with Executive Board, Head teachers and Senior Managers within the Authority. There is a commitment to support the BSF programme. This commitment is demonstrated by the readiness of corporate services to support delivery teams and the programme boards.

Workstreams have been identified in all key areas and Lead Officers appointed from across the Authority. Additional revenue has been secured to ensure successful programme delivery.

In addition to the internal Delivery Team, a range of external consultants have been commissioned to complement the programme delivery in the specialist areas of Technical, Legal, Finance, Educational Transformation and ICT



PID and Risk Management

The programme has been developed using a programme management methodology with a programme initiation document. This PID is a live document and is reviewed and updated regularly. The PID details the project governance, management structures, roles and responsibilities and includes: a programme structure organogram, an indicative project plan through to financial close, the budget for the procurement process, the resource approvals, a risk log and dash board reporting system. The PID and associated control documents. i.e. Risk register, programme Plan and dashboard are being maintained by the Delivery Team and are presented to all Board meetings by the Programme Director. All risks are given a “RAG” status and only the red or most important risks are reported to the board including the direction of travel. Risk management is seen as a key activity for a program of this size and its successful delivery. The PID is provided in Appendix 18, a summary of the Risk Register is in Appendix 19.

A Gateway 0 review and skills audit was conducted by 4Ps in January. The review found that “there is a clear strategic justification for the Halton BSF programme” they were “impressed with the commitment and enthusiasm of all the stakeholders involved in the review” and “found an exemplary approach to stakeholder consultation and engagement, resulting in a high degree of support for the BSF programme”. Steps are being taken to action the recommendations of the review.

We have strong capacity to deliver BSF. Our programme director has previously led BSF in another authority and is an experienced Gateway Reviewer for BSF programmes. Our Universal Learning Services is providing strong support to all schools throughout the visioning process. We are in regular dialogue with all schools, FE colleges, governors and members, to ensure that all key stakeholders remain committed to the BSF process.

The core BSF team is closely supported by external advisors. Our education consultants, Mouchel, have helped us and our schools prepare education visions which are relevant and deliverable. Our consultant Client Design Advisor, Curry and Brown, have worked closely with us and schools to develop estate options that address local priorities, meet visionary aspirations and will attract more detailed and innovative proposals from the marketplace. Our technical advisors, Curry and Brown, are working closely with Mouchel to ensure that the options presented are practical and affordable. Sport England is a statutory consultee and we are working closely with them.

We have appointed Beachcroft as legal advisors and Grant Thornton as financial advisors. Both of these firms are well established advisors in the wider BSF national programme. We have also appointed a highly experienced ICT consultant, Navigant, who has worked on other BSF schemes and is familiar with all the major players in the ICT managed service sector. The appointment of Navigant at the same time as Curry and Brown ensure that schools have access to both internal and external technical expertise to stimulate thinking on how ICT will influence and support 21st century teaching and learning. The ICT consultants are also assisting the Authority to refine its plans for a managed service and are working schools and other key stakeholders in a programme of workshops and interventions to support the development of innovation and best practice and to explore the “Art of possible” with schools. All our external advisors are closely managed to ensure we achieve the right balance between external and in-house work.



SfC2 Appendices

1. DCSF SfC1 Approval Clarifications
2. Updated chart of schools from SfC Part 1
3. Development of Key Performance Indicators in tabular form
4. Matrix showing link through from priorities to investment
5. Communication and Consultation Strategy and Work Plan/Schedule
6. School Strategies for Change
7. 14-19 planning in Halton
8. PE & Sports and Culture Data and maps
9. Example of Preventative profiling
10. Executive Summary of the Inclusion Strategy
11. Strategic Board Paper to set out the Procurement Strategy
12. Assessment of the condition, sufficiency and suitability of the secondary school estate in the wave
13. Pupil Place Planning
14. Estate options, including option appraisal methodology
15. Evidence of Sign Off
16. FAM & Finance and affordability
17. Outline Project Plan Milestones to Commercial Close
18. PID
19. Risk Register
20. Change Management Programme
21. National Challenge Plan
22. BSF Workforce strategy
23. Proposed Trust Status
24. Halton's Strategy for Support and Intervention
25. Consultant Deployment Plan
26. Secondary Strategy newsletter
27. Choice and diversity proposals
28. ICT Onward Strategy to OBC
29. Current position of ICT contracts
30. ICT Vision for Children and Young People

