

Strategy for managing falling pupil roll: update for Trustees, May 2024

Executive summary

This continues to be CLP's biggest challenge. Latest pupil intake numbers confirm it as an ongoing issue and affirm the inequitable spread of this challenge across our family of schools. That said, latest numbers do not indicate any surprises: all of the issues are under some level of proactive management. Mitigating strategies are underway (some more advanced than others) and we will see the benefit of those over time. Grappling with this issue across the Purbecks is emerging as a priority.

Latest context

School	PAN	No. of places offered
Baden Powell and St Peter's CE Primary School	180	180
Bethany CE Junior School	96	78
Corfe Castle CE Primary School	15	8
Courthill Infant School	120	120
Heatherlands Primary School	90	90
Heathlands Primary Academy and Preschool	30	13
Lilliput CE Infant School	120	112
Longfleet CE Primary School	90	90
Lulworth & Winfrith CE Primary School	20	18
Oakdale Junior School	128	83
Old Town Infant School and Nursery	60	46
Queen's Park Infant Academy	120	102
St Clement's and St John's CE Infant School	60	52
St George's CE Primary School	15	12
St Luke's CE Primary School	60	60
St Mark's CE Primary School	30	6
Stoborough CE Primary School	30	27
Swanage Primary School	30	26
Wareham St Mary CE Primary School	30	23
Wool CE Primary School	15	14
	1339	1160
		87%

This table provides the number of places offered following last month's National Offer Day. Note that these are *offers* not *acceptances*. Late applications will continue to be received until September and beyond.

Comparing these offers against the pupil numbers forecast for Oct 2024 census in the current financial plan, we are currently 86 short (1077 offers in original 16 CLP schools vs forecast of 1163). This is a shortfall of around £430K spread across nine of those 16 schools. 75% of this shortfall is held in four schools (Bethany -18, Heathlands -12, Oakdale -22, Queen's Park -13). We anticipate that whilst this pupil number deficit will improve as further applications arrive, the gap will not fully close.

Within these offer numbers, there were no particular surprises; schools offered below PAN are as we expected. St. Mark's presents as a particular challenge. (Note: since then, the numbers at LIS have

dropped to around 105 as some families have opted for local private education. This in itself is not a new phenomenon but it is the first time where there isn't an extended waiting list to back-fill those spaces; this is a new challenge for LIS).

Progress against mitigating actions from the strategy for managing falling roll

Lever	Update
Secure trust growth	Growth is the means through which the central budget is protected from the impact of falling roll. For example, our four new schools contribute around 50K surplus to the central budget. <u>Pre-schools:</u> We have three pre-schools at different stages of joining CLP via extending the age range of the relevant CLP primary schools. We have official consent from the DfE for this at Corfe Castle which, from September 2024, becomes 'Corfe Castle CE Primary and Pre-School'. All necessary implementation steps are underway. The capital works required will be in the region of £50K, a cost which will be covered in part by the pre-school's final reserve balance. However, we also hope to secure a grant of 35K from Dorset Council's 'Best Start in Life' programme. (Note: exciting 'live update': literally as I click 'save' on this paper, an email has landed confirming this grant. Impressive remote trustee influence!). We have commenced community consultation for a similar development at St. George's CE Primary, ending 21st May. At the time of writing, feedback has been positive (both through the consultation inbox and the in-person session led by the pre-school's Chair of Trustees on 13th May). TUPE consultation commenced on 14th May. Subject to those consultations and trustees' subsequent approval, we will apply to the DfE for a 'tier 1 significant change'. Finally, trustees have previously seen the letter from Cygnets (based at Swanage Primary)

	making a similar request which we will consider in due course. In all three cases, this work is about ensuring stability and viability to those pre-schools in order to protect the service for the community and the primary schools' future pupil numbers. <u>Winchester Diocese:</u> After a period of extended consultation, the Diocese has now confirmed its position regarding its church schools converting and joining MATs. In summary, the Diocese is neither encouraging nor discouraging its schools from academy conversion and it is further consulting on the future possibility of creating its own MAT. The Diocese has named two of its existing partner MATs where it would support their schools considering joining: CLP is one of those. Consequently, the Diocese expects two Bournemouth schools to be in touch by half term for an initial discussion; of the two, the Diocese anticipates that one has a particular interest in CLP (the other having a preference for a Diocesan MAT). We will have to see how this plays out but currently this presents as our strongest option for a 21st school. The budget scenarios provided by LT show the potential positive impact of such a development.
Engage with LA pupil place planning	We continue to work closely with BCP in this regard. Currently, the focus of these discussions is in relation to capacity for specialist provision (see below). Additionally, BCP has just set up another round of pupil place planning discussions for each planning area in July. The purpose of these meetings is to consider strategies for dealing with continuing surplus; CLP will attend them all. We have found it more difficult to engage Dorset Council on the subject of pupil place planning. They have supported our efforts regarding the Corfe Castle Pre-school development but there is less appetite to engage on the broader question of surplus school places in the Purbeck area more generally. We have now managed to secure a meeting on this subject on 20th May with Amanda Davis (Corporate Director for Education) and Jo Twine (Interim Capital Programme Manager). Next steps will be considered after this meeting and as our Purbeck schools' latest financial plans come together. Discussions in relation to school organisation in the Purbecks must also involve Salisbury Diocese and we know that the Diocese is ready to engage.
Generate income from under-used premises	<u>Linwood special school satellite at Oakdale Junior:</u> We have seen a significant increase in pace around this project recently. There is strong commitment from all parties: BCP, Linwood, OJS, CLP. Planning is progressing well towards Sept 2024 but there are barriers to achieving that opening date. BCP's approval process is slow for local authority officers to navigate. It is thought that the risk of not getting approval is low because the need for these special school places is demonstrably urgent. There is also a question around the involvement of the DfE. Whilst verbally confirming that the DfE 'will not stand in the way of Linwood hosting a satellite at OJS from September', they are yet to determine whether the project meets their threshold for 'significant change'. If it does – which seems likely – there will be a further hurdle to navigate. This will include community consultation. In summary, the probability that OJS will host a satellite for Linwood generating around 120K income is high; the probability that it will be ready for 1st Sept 2024 is low. (Note: as discussed at FTB, some queries have come through from OJS LGB regarding the use of income generated through this satellite. Brendan McCarthy responded on behalf of the Board after Resources Committee consideration). <u>Specialist places in BCP:</u> Linwood/OJS is our main development in this area. However, we currently have 'bespoke provisions' up and running at St. Clement's & St. John's and at Queen's Park (these provisions being supported financially in part by BCP). Over time, we know that both those schools will have increasing available space as their PAN reductions take effect (three extra spare classrooms at QPIA; seven across SCSJ/BJs). BCP is currently inviting 'bids' from schools / MATs in relation to setting up temporary bespoke provisions for

	pupils who have been agreed specialist placement but for whom there is not yet a space. That is the very basis on which our current provisions have already been established at QPIA and SCSJ. We are submitting a bid (even though we are already operational) so as to be formally 'on the record' given that the BCP tender documents make reference to such provisions possibly 'transitioning to special school satellites in the future'. We need to stay close to these developments. More recently, BCP has had the necessary permissions to create a new special school. No further details on that yet. <u>Purbecks:</u> Dorset Council, like BCP, is exploring options for increasing specialist place capacity. CLP is highlighting that the falling roll (especially at St. Mark's) opens up the possibility of space that can be used towards this effort. This will form part of the forthcoming discussion with Dorset LA officers.
Make PAN adjustments as required	With the ratification of the 2025/26 admissions policy last January, PAN reductions have been confirmed at St. Mark's, Queen's Park and Bethany. The latest pupil numbers support those PAN reductions as the right action to be taking. We are concerned about Oakdale. The PAN reduction from 180 to 128 took effect from September 2023. However, it looks as though this is not low enough: 113 in current year 3 and 83 offers for Sept 2024. Consulting next autumn to further reduce the PAN to 96 is a serious consideration. Similarly, the PAN reduction to 15 at St. Mark's is almost certainly not low enough but a PAN reduction below 15 has significant implications on the school's fundamental structure. The next logical reduction might be to a PAN of 8 and that implies a long term position of just two mixed-age classes (24 in YR/1/2 and 32 in Y3/4/5/6. [REDACTED])
Use reserves more flexibly	The reserves policy was recently ratified by Trustees with little substantive change. However, our discussions about how we manage reserves across CLP continue, broadening into what GAG-pooling might look like as future consideration (especially given the national trend of increasing use of GAG-pooling in MATs). As was discussed at the last FTB, we would recommend establishing a working party next year, made up of some trustees and key central staff. That working party should examine the GAG-pooling question in detail, weighing up possible advantages / disadvantages and drawing up a plan of how it might work within CLP. That working party's considerations should be directly informed by discussions with other MATs who have transitioned to GAG-pooling: what does GAG-pooling look like in their trust, what benefits does it bring and how was that transition managed?
Review school organisation	<u>St. Clement's & St. John's CE Infant and Bethany CE Junior operating 'as though' a single primary:</u> This work is progressing well since the update provided in March. The single SLT has now been fully appointed. Most recently, the SENDCo appointment was achieved internally which resolves the issue of having too many teachers (the result of 90 Y2 pupils leaving SCSJ and being replaced with up to 60 in YR). The main focus of the work now is on the financial planning. The plan being prepared is a single budget drawing on both schools as a single resource. The plan is being overseen by the single Headteacher who has also started working on a school improvement plan which encompasses both of the schools. This improvement work includes revisiting the vision and values at the start of the academic year, in-keeping with their new direction, and supported by Winchester Diocese. The question about whether we should pursue future legal designation as a single primary remains an open one. The finance queries with LA/ESFA as set out in March have not been resolved but we hope to bring a 'single legal primary' budget scenario to the Board in July to help further this consideration. [REDACTED] [REDACTED] [REDACTED] [REDACTED]

Other relevant updates

Oakdale Junior. As described above, pupil numbers are challenging at OJS. The financial impact of a long history of small classes is really being felt now. An early draft of the school's financial plan indicated an in-year deficit of around £175K. This must now prompt a more holistic piece of work, summarised as:

1. Revisiting the question of PAN;
2. Reducing the total number of classes currently in the school;
3. Reducing the teaching staff full time equivalence proportionate to (2);
4. Reviewing other staffing structures within the school.

Action for trustees

- OJS. Note R committee's response back to LGB regarding the use of income generated from the Linwood satellite;
- Noting the community consultation remarks above, approve making a 'tier 1 significant change' application to DfE in relation to St. George's pre-school;
- Agree arrangements for GAG pooling working group.