

HAMPSHIRE COUNTY COUNCIL

Decision Report

Decision Maker	Executive Lead Member for Children's Services
Date:	12 February 2025
Title:	Orchard Lea Infant School and Orchard Lea Junior School - proposed amalgamation and publication of a statutory Public Notice
Report From:	Director of Children's Services

Contact name: Amanda Vaughan

Email: Amanda.vaughan@hants.gov.uk

Purpose of this Report

1. The purpose of this report is to set out the feedback received following an informal period of public consultation and to seek approval for the publication of a statutory Public Notice in relation to the proposed amalgamation of Orchard Lea Infant School and Orchard Lea Junior School, Fareham, with effect from July 2028.

Recommendation(s)

2. That approval be given to the publication of a Public Notice to amalgamate Orchard Lea Infant School and Orchard Lea Junior School with effect from July 2028.

Executive Summary

3. This report seeks authority for the publication of a statutory Public Notice in relation to the proposed amalgamation of Orchard Lea Infant School and Orchard Lea Junior School with effect from July 2028
4. As part of the Department for Education (DfE) School Rebuilding Programme (SRP), both schools have been identified for replacement or, significant refurbishment. SRP carries out major rebuilding and refurbishment projects at schools.
5. Pupil forecasts over the next five years indicate that there is a 2fe (form of entry) demand for places in the locality. The proposed amalgamation to form a 2fe primary school within one school building presents a better opportunity

for the schools to secure a fit for future rebuild via the DfE School Rebuilding Programme and will consolidate the budget position with a settled pupil number intake and organisational structure.

6. This report sets out the feedback from the initial informal consultation and recommends that the amalgamation of Orchard Lea Infant School and Orchard Lea Junior School, Fareham, proceeds through to the publication of a statutory Public Notice. The development of a single 2fe building, and amalgamation of the two schools, through the extension of the age range of the Junior School, is the preferred option for both Hampshire County Council and the governing body of the federation. A single building would further support the sustainability of the two schools given the reduced costs associated with running two buildings. The amalgamation would be scheduled to align to the competition of the building works (DfE timeline indicates that this would be July 2028).

Contextual information

7. In order to undertake the required feasibility for a single building solution, the DfE require assurance from Hampshire County Council that the amalgamation of the two schools has been approved. To achieve this, a statutory process needs to be undertaken which would include periods of public consultation and the approval of the Executive Lead Member for Children Services. Should the conclusion of the process be to proceed with a 2fe primary school, the amalgamation would be scheduled to align to the competition of the building works (DfE timeline indicates that this would be July 2028). The informal consultation undertaken from 4th Nov to 2nd Dec 2024 was in initial response to this.
8. It is possible that following the feasibility study, the DfE propose to proceed with a scheme that does not result in a single building solution. For example, the feasibility may suggest that both the current infant school and junior school building be substantially refurbished. Should this be the case, the decision to amalgamate would need to be re-considered, given that the potential gains associated with a single building solution, would not be realised. Indeed, this scenario would result in the federation being significantly financially impacted through the removal of a lump sum and could result in a deficit budget position.
9. The Orchard Lea Federation was formed in December 2020. The vision of the federation is to support pupils through the Early Years Foundation Stage, Key Stage 1 and Key Stage 2 in a seamless learning journey as a virtual primary school

10. Under the current arrangements, one executive headteacher leads both schools. Each school has their own dedicated budget, each receives a separate Ofsted inspection, and each operate out of a separate building, albeit on one site
11. Staffing at both schools is relatively stable although a recent restructure removed a senior leadership role from the structure. This decision was made in order to create a more sustainable financial structure moving forward, and to reflect the level of leadership typically required in a 2fe primary school.
12. Following the DfE identifying both buildings as needing to be replaced as part of the SRP, Hampshire County Council engaged with the DfE to explore the option of a combined scheme that would result in a single building suitable for a 2fe primary school.
13. The development of a single 2fe building, and amalgamation of the two schools, through the extension of the age range of the Junior School, is the preferred option for both HCC and the governing body of the federation. A single building would further support the sustainability of the two schools given the reduced costs associated with running two buildings. These saving would include reduced site costs and also reduced staffing.

Finance

14. The schools have the following Devolved Formula Capital (DFC) balances (1 September 2024)
Orchard Lea Infant £29,718
Orchard Lea Junior £59,717
15. If the amalgamation is approved the DfE SRP will fully cover all capital costs. Discussions will also take place within the Hampshire 2050 Directorate regarding all opportunities that exist for utilising or disposing of any surplus accommodation and land that could be realised should the amalgamation be approved.
16. In addition, approval will be required from the DfE, under Section 77, of the School Standards and Framework Act 1998, in the event the status of the infant school site changes. Approval will also be required from the DfE for any alterations to the junior school if the amalgamation is approved, all changes would be undertaken in line with the statutory guidance (https://assets.publishing.service.gov.uk/media/66fd4f0a080bdf716392eccf/Opening_and_closing_maintained_schools_2024.pdf).

Performance

17. Educational outcomes – Expected Standard % shown.

Infant School				
	2022	National	2023	National
Y1 Phonics	78.6%	75.5%	72.1%	78.9%
Ks1 Reading	70.7%	66.9%	71.7%	68.2%
Ks1 Writing	69%	57.6%	64.2%	60.1%
Ks1 Maths	74.1%	66.7%	66%	70.6%
Junior School				
	2022	National	2023	National
Ks2 Reading	84.6%	74.5%	58.7%	74.3%
Ks2 Writing	78.8%	69.5%	77.8%	71.4%
Ks2 Maths	75%	71.4%	68.3%	72.9%
Ks2 RWM	70.2%	58.7%	50.8%	59.5%

18. Outcomes at the Infant school dropped in 2023 when compared to 2022. Attainment in Reading and Writing were above national in 2023, but the school figure was below national for both Y1 Phonics and KS1 Mathematics
19. Attainment at the Junior School dropped in 2023 when compared to 2022. The school figures were below national in Reading, Mathematics and the combined RWM measure. Overall effectiveness at the Junior schools was judged to be good by Ofsted in July 2024. The Infants was judged to be Requiring Improvement by Ofsted in June 2023. Indicators suggest that the infant school is on a secure trajectory to good at the next inspection

Consultation and Equalities

20. An informal consultation was conducted from 4th November 2024 to 2nd December 2024 which included a letter sent to stakeholders, a website with information including FAQs, and a public drop-in session on 27th November. (Appendix A)
21. In total one response was received via e-mail. This was supportive and the concerns raised recorded. The comment received during the consultation process is shared in full at Appendix B

Comment: Buildings structural safety and Kitchen facilities

Response: Both school buildings are structurally safe and therefore do not present a concern for children and staff. These comments will be addressed as part of the detailed work to be undertaken should approval to proceed be obtained.

Climate Change Impact Assessment

22. Hampshire County Council utilises two decision-making tools to assess the carbon emissions and resilience impacts of its projects and decisions. These tools provide a clear, robust, and transparent way of assessing how projects, policies and initiatives contribute towards the County Council's climate change targets of being carbon neutral and resilient to the impacts of a 2°C temperature rise by 2050. This process ensures that climate change considerations are built into everything the Authority does.

The main principal of current and future school place provision is that the County Council aims to provide local places for local children. The County Council is committed to providing accommodation for school places with design solutions that carefully consider the impact on climate change. The project detailed in this report will be brought forward with an impact assessment that will include details of any climate change adaptation measures.

Carbon Mitigation

The proposal is to create a primary school likely utilising the Junior School building. This report seeks approval to the amalgamation of the two schools relating to school place planning, but mitigation and adaptation strategies may be needed in the future to ensure that the buildings are resilient to climate change. However, this will be outlined in future reports and the climate impacts on the school buildings will be closely monitored.

Should approval eventually be granted to close the school, the decision would support the strategic priority of ensuring people in Hampshire live safe, healthy, and independent lives is met.

Conclusions

23. As a result of the potential investment from the DfE through their SRP and varied and fluctuating pupil numbers, together with needed improvements in educational outcomes, it is felt that amalgamation of the two existing schools, (through the extension of the age range of the Junior School), is the preferred option for both HCC and the governing body of the federation. Both school governing bodies recognise this and have requested that the LA consult on an amalgamation. If approved this will result in the closure of Orchard Lea Infant School and the extension in age range, to provide primary education on the Orchard Lea Junior School site.
24. It is recommended that the Executive Lead Member for Children's Services gives approval to proceed with the publication of a statutory Public Notice in

relation to the proposed amalgamation of Orchard Lea Infant School and Orchard Lea Junior School, Fareham, with effect from July 2028

REQUIRED CORPORATE AND LEGAL INFORMATION:

Links to the Strategic Plan

Hampshire maintains strong and sustainable economic growth and prosperity:	No
People in Hampshire live safe, healthy and independent lives:	Yes
People in Hampshire enjoy a rich and diverse environment:	No
People in Hampshire enjoy being part of strong, inclusive communities:	Yes

Section 100 D - Local Government Act 1972 - background documents

The following documents discuss facts or matters on which this report, or an important part of it, is based and have been relied upon to a material extent in the preparation of this report. (NB: the list excludes published works and any documents which disclose exempt or confidential information as defined in the Act.)

Document

Location

None

EQUALITIES IMPACT ASSESSMENT:

Equality Duty

The County Council has a duty under Section 149 of the Equality Act 2010 ('the Act') to have due regard in the exercise of its functions to the need to:

- Eliminate discrimination, harassment and victimisation and any other conduct prohibited by or under the Act with regard to the protected characteristics as set out in section 4 of the Act (age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation);
- Advance equality of opportunity between persons who share a relevant protected characteristic within section 149(7) of the Act (age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex and sexual orientation) and those who do not share it;
- Foster good relations between persons who share a relevant protected characteristic within section 149(7) of the Act (see above) and persons who do not share it.

Due regard in this context involves having due regard in particular to:

- The need to remove or minimise disadvantages suffered by persons sharing a relevant protected characteristic that are connected to that characteristic;
- Take steps to meet the needs of persons sharing a relevant protected characteristic that are different from the needs of persons who do not share it;
- Encourage persons sharing a relevant protected characteristic to participate in public life or in any other activity in which participation by such persons is disproportionately low.

Equality Impact Assessment (EIA)

Equality Impact Assessment

What is an Equality Impact Assessment (EIA) and why does the County Council do them?

The [Public Sector Equality Duty](#) (PSED) is an obligation within the [Equality Act 2010](#) ("the Act"), which asks public authorities, like Hampshire County Council, to give 'due regard' to equality considerations, in particular to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.

This includes assessing the impact of policies and practices on individuals and communities with a protected characteristic, as defined in the Act and some other specific groups. The County Council uses EIAs to ensure it has paid 'due regard' to equalities considerations when there are changes to a service or policy, a new project or certain decisions.

EIA author	Position & Department	Contact
Richard Bayless	Project Officer Children's Services	richard.bayless@hants.gov.uk

Title:	Orchard Lea Infant School and Orchard Lea Junior School Amalgamation
Related EIAs:	None
EIA for Savings Programme:	No
Service affected	Orchard Lea Infant School and Orchard Lea Junior School, Fareham
Description of the service/policy/project/project phase	Orchard Lea Infant School and Orchard Lea Junior School are mainstream schools in Fareham. These schools share the same site and share some outdoor facilities such as the school playing field however, they operate from separate buildings.
New/changed service/policy/project	As part of the Department for Education (DfE) School Rebuilding Programme (SRP), both schools have been identified for replacement or significant refurbishment. It is proposed to create a single 2FE (Forms of Entry) building and to amalgamate the two schools through the extension of the age range of the Junior School. A single building would further support the sustainability of the two schools given the reduced costs associated with running two school buildings. Pupil forecasts over the next five years indicate that there is a 2FE demand for places in the locality. The proposed amalgamation to form a 2FE primary school within one school building presents a better opportunity for the

schools to secure a fit-for-future rebuild via the SRP and will consolidate the budget position with a settled pupil number intake and organisational structure.

<p>Engagement</p> <p>A consultation was conducted running from Monday 4 November 2024 to Monday 2 December 2024 which included a letter sent to stakeholders, a website with information including FAQs, and a public drop-in session with members of the project team which was held on Wednesday 27 November 2024 at the school. Stakeholders consulted were:</p> <p>Parents of children attending Orchard Lea Infant School and Orchard Lea Junior School</p> <p>Headteachers, school staff and Governing Body of the school</p> <p>Headteachers and Chairs of Governors of neighbouring schools</p> <p>Fareham Councillors</p> <p>Local Diocese</p> <p>Local MP</p> <p>HCC Elected Members</p> <p>Residents of the immediate areas</p> <p>Other relevant community stakeholders</p>
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Equalities considerations - Impact Assessment

Age

Impact on public	Neutral
Impact on staff	Negative - Low
Rationale	There will be no change in benefits to the public over and above the current circumstances and over other protected characteristics therefore the impact has been assessed as neutral for members of the public in terms of age. The revised staffing structure for the new primary school however may result in some job losses and some staff may consider they do not wish to apply for posts in the new primary school. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	Depending on the outcome of the decision, the Council's human resources department will liaise with affected staff.

Disability

Impact on public	Neutral
Impact on staff	Neutral
Rationale	There will be no change in benefits to this protected characteristic group, over and above the current circumstances and over other protected

	characteristics groups, therefore the impact has been assessed as neutral for both staff, children and young people. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	

Gender Reassignment

Impact on public	Neutral
Impact on staff	Neutral
Rationale	There will be no change in benefits to this protected characteristic group, over and above the current circumstances and over other protected characteristics groups, therefore the impact has been assessed as neutral for both staff, children and young people. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	

Pregnancy and Maternity

Impact on public	Neutral
Impact on staff	Neutral
Rationale	There will be no change in benefits to this protected characteristic group, over and above the current circumstances and over other protected characteristics groups, therefore the impact has been assessed as neutral for both staff, children and young people. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	

Race

Impact on public	Neutral
Impact on staff	Neutral
Rationale	There will be no change in benefits to this protected characteristic group, over and above the current circumstances and over other protected characteristics groups, therefore the impact has been assessed as neutral for both staff, children and young people. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	

Religion or Belief

Impact on public	Neutral
Impact on staff	Neutral
Rationale	There will be no change in benefits to this protected characteristic group, over and above the current circumstances and over other protected characteristics groups, therefore the impact has been assessed as neutral for both staff, children and young people. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	

Sex

Impact on public	Neutral
Impact on staff	Neutral
Rationale	There will be no change in benefits to this protected characteristic group, over and above the current circumstances and over other protected characteristics groups, therefore the impact has been assessed as neutral for both staff, children and young people. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	

Sexual Orientation

Impact on public	Neutral
Impact on staff	Neutral
Rationale	There will be no change in benefits to this protected characteristic group, over and above the current circumstances and over other protected characteristics groups, therefore the impact has been assessed as neutral for both staff, children and young people. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	

Marriage and Civil Partnership

Impact on public	Neutral
Impact on staff	Neutral
Rationale	There will be no change in benefits to this protected characteristic group, over and above the current circumstances and over other protected characteristics groups, therefore the impact has been assessed as neutral for both staff, children and young people. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	

Poverty

Impact on public	Neutral
Impact on staff	Neutral
Rationale	There will be no change in benefits to this protected characteristic group, over and above the current circumstances and over other protected characteristics groups, therefore the impact has been assessed as neutral for both staff, children and young people. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	

Rurality

Impact on public	Neutral
Impact on staff	Neutral
Rationale	There will be no change in benefits to this protected characteristic group, over and above the current circumstances and over other protected characteristics groups, therefore the impact has been assessed as neutral for both staff, children and young people. All relevant policies and procedures will be adhered to, so that no protected group is negatively impacted.
Mitigation	

Geographical Impact:Fareham

Equality Statement

Additional information:

Whilst the infant school will close the junior school will extend its age range to cater for those pupils currently on roll in the infant school. The schools share a site so provision will continue in its current location within a primary setting rather than separate infant and junior schools.

Overview Statement:

A summary assessment to show that due regard to the Public Sector Equality Duty has been paid, which is undertaken when a full EIA is not needed:

EIA reference number: 00789

Date of production of EIA for publication: 08/01/2025

Appendix A

Date



Hampshire SO23 8UG

To parents / guardians of children
at Orchard Lea Infant and Orchard
Lea Junior School

Telephone 0300 555 1384
Textphone 0845 803 5825

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Amanda Vaughan

4 November 2024

strategicplanningunit@hants.gov.uk

Dear Consultee

Consultation on the amalgamation of Orchard Lea Infant School and Orchard Lea Junior School within a single primary school

Hampshire County Council, with the full support of the school leaders, wishes to consult on the amalgamation of Orchard Lea Infant School and Orchard Lea Junior School to become a Primary School within a single primary school.

This consultation will run from Monday 4 November until Monday 2 December 2024.

Further information, including the reasons for this consultation, the anticipated benefits and details on how you can comment can be found on the Hampshire County Council website at <http://consultations.hants.gov.uk/active.aspx>

Officers will take into consideration all the consultation responses received by **Monday 2 December** before deciding whether the proposal should continue to the formal publication stage. Therefore, we value your feedback on this proposal.

If you are unable to access the consultation information on the council's website, please contact us on the details at the top of this letter.

Yours faithfully


A handwritten signature in black ink that reads 'A Vaughan'.

Amanda Vaughan
Strategic Development Officer
Children's Services Department

Director of Children's Services
Stuart Ashley



Appendix B

 Outlook

Orchard Lea Amalgamation

From [REDACTED]
Date Thu 07/11/2024 09:35
To Strategic Planning Unit <strategicplanningunit@hants.gov.uk>

[REDACTED]

Good morning,

Consultation on the amalgamation of Orchard Lea Infant School and Orchard Lea Junior School within a single primary school

While I think this option is a good idea I do have a few concerns.

1. The junior school has already been condemned, by you, so why would your proposal say that you would knock down the infants and move the infant children into the junior school while building work is carried out?
2. The junior school does not have a kitchen for lunches to be cooked, and the year R to year 2 children are offered free meals from the government. How will this be addressed?

Kind regards