

**CARDIFF EDUCATION: COLLABORATION AND FEDERATION  
STRATEGY**

**EDUCATION (COUNCILLOR SARAH MERRY)**

**AGENDA ITEM: 2**

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*Appendix 2 to this report has been redacted to remove personal information which is exempt from publication pursuant to paragraphs 12 and 13 of Schedule 12A, Part 4 of the Local Government Act 1972.*

**Reason for this Report**

1. To enable the Cabinet to consider a recommendation to adopt the Cardiff Education: Collaboration and Federation Strategy.

**Background**

**The Cardiff Context – ‘Stronger, Fairer, Greener’ and the Importance of Education**

2. In October 2019, Cabinet approved the Cardiff 2030 renewed vision for education and learning in the city. This has provided a framework for continued consolidation of progress, supported educational improvement over the last 4 years.
3. We recognise that Cardiff has made significant progress in terms of the number of schools that offer high quality educational experiences to their pupils as evidenced through Estyn reports which has been driven by strong leaders and governors across our schools. Every school in Cardiff works in partnership with others whether with families and organisations in their local community, with their secondary school transitions or with other schools with a view to enhancing opportunities for learners and staff.
4. However, the pandemic required schools to adopt radically different ways of working with significant use of online teaching and learning albeit for many the abrupt transition did not enable all to benefit from the same input as they would in school. Whilst the vast majority of our learners have experienced greater stability with the return to consistent in school learning over the last 2 years, the Covid legacy continues with Her Majesty's Chief Inspector for Education and Training in Wales reporting how learners have been impacted by ‘lost learning’, and how this has been accompanied by

persistently high levels of absenteeism and school refusal associated with anxiety returning to the school environment.

5. The number of learners in Cardiff with complex Additional Learning Needs (ALN) requiring specialist provision was already steadily increasing before 2020. Post-pandemic rates have risen faster rather than abated with c3.5% of learners now requiring specialist placements to meet their needs, compared to 2.9% in 2017/18. Responding to these challenges effectively has necessitated careful planning to support our learners, their families and our education workforce as they return to the previous norms.
6. Subsequent to the pandemic the UK has experienced financial challenges with public services under unprecedented pressure particularly in terms of funding for health, social care and education services. Income inequality has risen with more children in Cardiff living in relative low-income families (DWP) and a greater proportion of learners eligible for eFSM (Welsh Government 09/2023).

## Issues

7. Over recent years Cardiff has seen the following emerging challenges:
  - Demographic changes – including birth rates that vary by c1000 from the peak to the trough pupil cohorts
  - ALN demand – that has outstripped supply of places over many years
  - Changes in city-wide and local migration patterns
  - National and local commitments and targets for expanding Welsh-medium school provision
  - Education estate – that is in poor condition owing to decades of historical underinvestment
  - Recruitment and retention challenges – including all levels of staffing
  - Financial instability with an increasing number of schools facing budget challenges – consistent with the rest of the UK
  - Inequality of provision – including access to Welsh medium education and post 16
  - Wellbeing and mental health of young people – that has deteriorated since the pandemic
  - Insufficient use of the facilities across our education estate – with a need to enable greater access to physical assets and deliver more value to local communities.

## Way Forward

8. Taking all of the issues outlined above into account, it is clear that the importance of ensuring our learners can benefit from a highly effective education is ever more important if we are to make strides in offsetting disadvantage and support social mobility and cohesion.
9. The Cardiff Education: Collaboration and Federation Strategy enclosed in **Appendix 1** has been developed to build upon the recent achievements across Cardiff's schools, to consider the changing demands for the future and to outline our vision to deliver the themes and goals of Cardiff 2030.

10. In recognising the role of strong leadership and governance in advancing educational outcomes for children and families, Cardiff will look to, through this strategy, enhance collaborative processes to the benefit our learners and the education workforce in the city. The strategy will provide a framework to encourage collaborative working and include a toolkit that practitioners should consider in localities across the city.
11. The benefits of collaboration between schools are now firmly established in Cardiff and backed by national and international research into effective school systems worldwide. This has included the Estyn thematic review (2019) and the Federation Process of Maintained Schools Guidance for Local Authorities and Schools (2023) which critically considered the research and concluded the following key benefits:
  - strong strategic leadership, governance and management structures allowing school-based leaders to focus on teaching, learning and raising standards
  - broader learning and social experiences for learners supports improved and more sustainable outcomes
  - attractive recruitment opportunities and retention of staff by providing a range of professional learning and new career pathways for staff
  - new opportunities for staff to work together, increasing motivation, reducing workload and isolation through shared planning and activities
  - the sharing of resources, taking advantage of economies of scale and avoiding the duplication of resources and effort
  - shared responsibilities and accountabilities for children across communities rather than just within a specific school for the benefit of all learners
  - the offer of extended services across schools and a variety of activities, childcare, parent support and community access which an individual school may not be able to provide supporting community cohesion and helping to sustain education provision.
12. This strategy builds on this evidence, along with incorporating the experience and knowledge of Cardiff and Central South Consortium (CSC) professionals and Cardiff headteachers that are skilled in collaborative working and that have a demonstrated ability to lead high quality teaching and learning organisations that include two or more schools as illustrated in the case studies at **Appendix 2**.

### **Local Member Consultation**

13. This is a city-wide strategy that potentially affects many wards. Local members would be briefed and formally consulted when related proposals are brought forward.

### **Reason for Recommendations**

14. To bring forward a more localised Education offer across the city that supports Education outcomes.

## **Impact of the Proposals on the Welsh Language**

15. The Welsh Government's Welsh Language Strategy sets out the vision of a million Welsh speakers across Wales by 2050.
16. The Welsh Government published its Cymraeg 2050 strategy in 2017 which sets out a vision of reaching one million Welsh speakers by 2050. By 2050, the aim is for 40 per cent of children (in each year group) to be in Welsh-medium education. Of those in English-medium education, the assumption is that half of those leaving school will report that they are able to speak Welsh. The strategy assumes that, nationally, 70 per cent of 15-year-olds will be able to speak Welsh by 2050, made up of 40 per cent in Welsh-medium schools and 30 per cent in English-medium schools.
17. The Welsh in Education Strategic Plans (Wales) Regulations 2019 make provision for a local authority to prepare a ten-year Plan. Cardiff's Welsh in Education Strategic Plan (WESP) was published on the Council's website on 1 September 2022 following approval by the Welsh Minister in July 2022.
18. This strategy supports all outcomes of the Cardiff WESP, but it most notably contributes to the increase of the number of teaching staff able to teach Welsh (as a subject) and teach through the medium of Welsh. The strategy includes an executive leadership programme that would provide a development route for talented Welsh Medium leaders and governors. In line with the strategy collaborations and federations would also be able to develop professional development routes across the organisation that may attract Welsh speaking staff.

## **Wellbeing of Future Generations**

19. The Wellbeing of Future Generations (Wales) Act 2015 ("the Act") places a 'well-being duty' on public bodies aimed at achieving 7 national well-being goals for Wales – a Wales that is prosperous, resilient, healthier, more equal, has cohesive communities, a vibrant culture and thriving Welsh language, and is globally responsible.
20. In discharging its duties under the Act, the Council has set and published well-being objectives designed to maximise its contribution to achieving the national well-being goals. The well-being objectives are set out in Cardiff's Corporate Plan 2021-2024.
21. This strategy is closely aligned with the goals of the Act as it looks to establish strong footings for the future of sustainable Education and in doing so will support the Education outcomes outlined in Cardiff 2030. The impact can be found in the Single Assessment in **Appendix 3**.

## **Financial Implications**

22. This Cabinet report and attached strategy sets out the current context of Education provision in Cardiff, and aspirations of education provision over the next 10 years, especially increase collaboration and increasing school federation. Whilst the recommendations to the report do not directly result

in any financial implications, consideration will need to be given to each action arising and whether or not there is a resource implication.

23. The report is set against a difficult financial backdrop within the Authority's schools, as increasing reliance on school balances is resulting in an increasing number of schools setting a deficit budget. **Appendix 1** notes that where a medium plan has not been agreed with schools that delivers a balanced budget acts as a trigger to consider a Local Authority-led federation. For any federation of schools to be financially viable, the cost associated with implementing a federated model would need to be affordable in the short term, and result in a financially sustainable education system in the long term. Affordability will need to be assessed upon the overall school balances to ensure there is not any risk to the authority's financial resilience, and any financial implications will need to be managed within existing and future resources. There is no budgetary allocation specifically set aside for the implementation of operational plans to deliver this vision.

### **Legal Implications**

24. The Council has a legal obligation under the Education Act 1996 to promote high standards and fulfilment of potential when exercising their education functions. The Local Government Measure 2009 sets out the Council's obligations to ensure continuous improvement in the exercise of its functions.
25. In considering this matter, the Council must have regard to its public sector equality duties under the Equality Act 2010 (including specific Welsh public sector duties). This means the Council must give due regard to the need to (1) eliminate unlawful discrimination, (2) advance equality of opportunity and (3) foster good relations on the basis of protected characteristics. The protected characteristics are age, gender reassignment, sex, race – including ethnic or national origin, colour or nationality, disability, pregnancy and maternity, marriage and civil partnership, sexual orientation, religion or belief – including lack of religion or belief.
26. The Welsh Language (Wales) Measure 2011 and the Welsh Language Standards and consider the impact of its decision upon the Welsh Language.
27. When taking strategic decisions, the Council also has a statutory duty to have due regard to the need to reduce inequalities of outcome resulting from socio-economic disadvantage ('the Socio-Economic Duty' imposed under section 1 of the Equality Act 2010). In considering this, the Council must take into account the statutory guidance issued by the Welsh Ministers (WG42004 A More Equal Wales The Socio-economic Duty Equality Act 2010 (gov.wales) and must be able to demonstrate how it has discharged its duty.
28. An Equalities Impact Assessment aims to identify the equalities implications of the proposed decision, including inequalities arising from socio-economic disadvantage, and due regard should be given to the outcomes of the Equalities Impact Assessment (**Appendix 3**).

29. The process for the federation of maintained schools is governed by the Federation of Maintained Schools (Wales) Regulations 2014.
30. Legal advice should be sought as and when needed in respect of the development and implementation of operational plans.

### **HR Implications**

31. The Cardiff Education: Collaboration and Federation Strategy has been developed to build upon the recent achievements across Cardiff's schools, to consider the changing demands for the future and to outline the vision to deliver the themes and goals of Cardiff 2030.
32. Joint working between the Council, schools, governing bodies, the Central South Consortium, and potentially other partners, will be required in order to deliver this strategy. Full consultation with stakeholders will be required which includes school leaders and staff, governing bodies and will also require trade union engagement.
33. HR People Services will provide advice, support and guidance to the governing bodies for the workforce planning and any consequential recruitment processes.

### **Property Implications**

34. There are no direct property implications arising from this strategy, however, Strategic Estates will continue to work closely with Education as the strategy develops and will be available to provide property related advice and support as necessary.
35. Where there are any relevant property management matters, property transactions or valuations being undertaken by the Council to deliver any proposals, they should be done so in accordance with the Council's Asset Management process and in consultation with Strategic Estates and relevant service areas.

### **Traffic and Transport Implications**

36. Overall pupil travel arrangements for both mainstream and for ALN pupils using Learner Transport for their journey to school are not anticipated to be affected by this Strategy. Transport officers will continue to work with Education to support travel arrangements and facilities for the journey to school.
37. Changes in staff operations and deployment would be anticipated to have travel and transport implications for only a small number of staff at each Federation or Collaboration who may be moving between sites. There would be negligible impact on traffic.
38. Existing school management and provision would be expected to be able to accommodate these changes in working practice for a small number of staff. In the event that a new development was to be required as a result

of this strategy, this would be subject to the Parking Standards (contained within the Council's 2018 "Managing Transport Impacts Supplementary Planning Guidance"). This sets out the required provision for minimum levels of cycle storage equivalent to one cycle space per 5 secondary school pupils and maximum car parking allocations, at one space per 30 pupils with further allocations for disabled parking provision.

### **Impact Assessments**

39. An initial Single Impact Assessment has been carried out and is attached as **Appendix 3**. This includes an Equality Impact Assessment, Child's Rights Impact Assessment and Welsh Language Impact Assessment. The views of stakeholders would be sought as part of any consultations and the assessment would be reviewed as part of the post consultation analysis.
40. The Council would also seek the views of the school communities and the wider community to inform a Community Impact Assessment, ahead of and during the consultation period.

### **RECOMMENDATIONS**

The Cabinet is recommended to:

- (i) Approve the adoption of the Cardiff Education: Collaboration and Federation Strategy
- (ii) Delegate responsibility to the Director of Education and Lifelong Learning for the development and implementation of operational plans to deliver the success measures set out in the strategy.

<b>SENIOR RESPONSIBLE OFFICER</b>	<b>Melanie Godfrey</b> Director of Education & Lifelong Learning
	23 February 2024

*The following appendices are attached:*

- Appendix 1: Cardiff Education: Collaboration and Federation Strategy
- Appendix 2: Cardiff Collaborations and Federations 2024 Case Studies
- Appendix 3: Single Impact Assessment

*The following background papers have been taken into account:*

[Cardiff 2030 Strategy](#)

[Federated schools - Common features of effective federation \(gov.wales\)](#)

[Federation process of maintained schools: guidance for governing bodies and local authorities \[HTML\] | GOV.WALES](#)