

PROJECT INITIATION DOCUMENT (TERMS OF REFERENCE)

TRANSFORMING EDUCATION – REVIEW OF SECONDARY EDUCATION

BACKGROUND

After consideration of the Requête ‘Determining the best model for secondary education’ P.2020/14 dated 28th January, 2020, the States resolved:-

1. To direct the Committee *for* Education, Sport & Culture not to enter into any contractual obligations on behalf of the States or continue with any associated procurement processes for implementation of any elements of the 1 school on 2 sites plan as approved by the States on 6th September 2019;
2. To direct the Committee *for* Education, Sport & Culture to prepare a report before the end of the term of the current States¹, that must include a comprehensive comparison of the structure and implementation of the 1 school on 2 sites plan with other viable models of non-selective educational delivery in Guernsey previously presented to and considered by the Committee, for consideration by the Committee *for* Education, Sport & Culture as constituted after the 2020 General Election ("the newly constituted Committee") and to direct the newly constituted Committee to revert to the States before the end of 2020 with a Policy Letter and suitable Propositions to implement what it believes to be the best model for secondary education in Guernsey. [Note: this resolution was superseded by the Policy Letter of 20 March 2020 (see below)].
3. To agree that any comparison or consideration of educational models must exclude models that involve selection by academic ability or aptitude.

The scope of this review has been further informed through the Policy Letter ‘Review of the Structure of Secondary Education – Next Steps’ P.2020/51 agreed by the States on 20 March 2020, which resolved that:

- There should be One School²
- The timeline and budget for The Guernsey Institute should be revised
- The timeline and budget for La Mare de Carteret Primary School should be revised
- £600k budget should be transferred from 11-18 School to Digital Roadmap
- The Secondary Education Models to be reviewed should include:
 - Two 11-18 colleges
 - Three 11-18 colleges
 - Two 11-16 colleges and one 11-18 college
 - Three 11-16 colleges and a separate sixth form college on a different site
- The models should be compared against a range of criteria including quality of education, value for money, infrastructure and organisational considerations.

¹ At the time the Requête was debated the end of the term was June 2020.

² Consistent with the vision for secondary education agreed by the States in January 2018: ‘the 11 to 18 School, operating on two sites, would be one organisation with a single board of governors and a single executive leadership team, but each site would develop its own identity and make day-to-day decisions.’ (Secondary and Post-16 Education: The Alternative Model – A Proposal for Opportunity and Excellence)

- The review should allow the opportunity to discuss space standards, configuration of space and day-to-day operations
- The current CfESC to remain in place
- The Policy Letter to be submitted to the States before 28 April 2021
- A stakeholder engagement plan should be drawn up
- Planned revenue savings would be deferred

The purpose of this Project Initiation Document (Terms of Reference) is to lay out the implications for the Transforming Education Programme and the planned activities to deliver on these States Resolutions.

OBJECTIVES

The objectives of this project are to:

1. Deliver a review of the Structure of Secondary Education as determined by the resolutions of the States arising from the Requête ‘Determining the best model for secondary education’ and the policy letter ‘Review of the Structure of Secondary Education – Next Steps’ to:
 - deliver a review of three models of secondary education against the ‘benchmark’ of two 11-18 colleges
 - consult widely with key stakeholders on the future structure of secondary education
 - consult with unions representing teachers and support staff on other aspects of secondary education, including space standards, configuration of space and day-to-day operations of secondary schools
 - consider the implications of the review on the timeline and capital budget for other elements of the Transforming Education Programme (The Guernsey Institute, LMDC Primary School rebuild)
 - consider the implications of the Covid-19 pandemic, and the likely future constraints on States financial position.

SCOPE

Models

The review should compare the two 11-18 colleges model with:

- Three 11-18 colleges
- Two 11-16 colleges and one 11-18 college³
- Three 11-16 colleges and a separate sixth form college on a different site

³ A co-located sixth form college will inevitably benefit from the use of shared facilities and teaching staff of the 11-16 school. The CfESC are prepared to consider a variant of this option during Phase 3 which includes a separate sixth form college co-located on one of the 11-16 school sites, but operationally wholly separate from it.

In addition, it will be important to be able to compare these models with the status quo to clearly articulate the implications of continuing with the current model.

Within each of the above options, there are many permutations when sites are taken into consideration. These permutations will be narrowed down during the Longlisting phase (see Approach below) in order to enable a like-for-like comparison of the shortlist of models.

Level of detail

The review should, as a minimum, consider the following aspects of each model:

Quality of education:

- Promoting the highest possible standards and outcomes;
- Range and equality of opportunities, including curriculum and facilities;
- Curriculum breadth and opportunities to group students flexibly;
- Standard of and access to facilities indoors and outdoors;
- Recruitment, retention, flexibility and resilience of staff teams;
- Pastoral support and wellbeing of students and staff;
- Support for students with special educational needs or disabilities;
- Pupil teacher ratios and average class sizes;
- Extra-curricular and enrichment opportunities; and
- Ease of transition between different phases of education.

Value for money:

- Capital expenditure;
- Revenue expenditure: making the best use of the funds the States are prepared to spend on secondary education annually; and
- Transition costs to move from the *status quo* to the new model.

Infrastructure & organisation:

- Infrastructure at the school sites;
- Infrastructure around the school sites;
- Capacity and capability of the States to implement the model;
- Consistency with States' strategic objectives; and
- School operational issues which are specific to any particular model (excluding those which are general to all models).

Other considerations

The review must also explore and build on the following:-

- Lessons learnt from the 11-18 programme to date
- Discussion of educational excellence and elements of the current secondary education system that should be retained
- Space standards to be used
- Operational policies and impact on terms & conditions – including enrichment, length of school day, lunch breaks, etc

- One School concept - considering which decisions would be taken at the one school level, and those which would be taken at college level.

APPROACH

The overall approach must take into account:-

- Resolutions of the States made in March 2020
- Current Covid-19 situation (see Risks)
- Independence
- Stakeholder Engagement
- Compliance with 'Green Book' Business Case approach
- Deadline – April 2021 (according to the States Resolution)

The approach to the review will take five phases. The key planning objectives which underpin this approach are to ensure that:

- The review delivers on the resolutions of the States of 20 March 2020.
- Consultation with school staff and their union representatives – which will be focused around phases 2 and 4 – will take place during term time (see Risks).
- The review is completed in time to deliver a Policy Letter within the timeline directed by the States.

Phase 1 – Planning & Preparation (Apr-Jun 2020)

Agreeing Terms of Reference (this document) and detailed plans; preparing financial models (updating with 2019 population data, adapting two-school financial model to work for three school models); evaluation framework; consultation approach and gathering together existing work to date.

Since the two colleges model is being used at the “benchmark”, the evaluation of other models will use the same base data and assumptions used in the Outline Business Case for this model, in particular: space standards, curriculum, class size policy, school population projections, private school buy-out, etc.

The Evaluation Criteria for the shortlist will be developed during this phase – based on the criteria listed above; and will be further refined in consultation with key stakeholders during Phase 2. These will then be used for the shortlist evaluation in Phase 3.

Phase 2 – Reducing Longlist to Shortlist (May-July 2020)

Reducing the number of permutations to be evaluated through a series of policy decisions so that for each education model option to be evaluated there is clarity concerning:-

- which sites will be used for the model
- the implications for the feeder school model and transition plan
- the number of forms of entry per site
- the space required at each site

Some of the policy decisions to be used to reduce the longlist permutations will include:-

- Should any options for sites beyond the existing four secondary sites be considered for inclusion in any of the models?
- Should St Sampson's and Les Beaucamp, as the most-recently-built schools, be included in all three-school options?
- What is the extent of the maintenance, repair and repurposing required at Les Varendes site – and what options exist to accommodate the school during this period?
- Which of the three selected sites would be the best location for the Sixth Form in the 1 x 11-18, 2 x 11-16 colleges model?
- Which of the four sites would be the best location for the Sixth Form in the 3 x 11-16 colleges + separate Sixth Form model?

The team will explore possible options for the implementation of each of the models included in the review, including the potential sites used and possible distributions of students across them. These will be used to form a shortlist for each of the models. A rationale for options excluded before this point will be shared with NCTLG, and others could be explored. The final review will include detailed analysis of one possible implementation plan for each of the models included. Feedback from NCTLG will be presented to the Committee before a decision is made on the version of each of the models included in the review. In order to allow detailed evaluation of each of the models during July and August, the team would really value weekly meetings (potentially with a subset of the NCTLG liaison group) as the options are refined.

Phase 3 – Shortlist Evaluation (July – Aug 2020)

Carry out the detailed financial modelling to enable capital, revenue and transition costs to be estimated for each option. Review and update high level Transforming Education Programme plan for each option. Evaluate each option against the non-financial evaluation criteria.

The financial modelling should also include the sensitivity of the models to different factors to enable them to be adjusted and compared. (For example is model A is more expensive than model B, could the total costs be brought into line by an x% adjustment in one of the key variables/assumptions?).

Phase 4 – Shortlist Consultation (Sep – Oct 2020)

Consultation on the shortlist evaluation with key stakeholder groups (particularly school staff and union representatives).

CfESC to come to a recommendation of the shortlisted options to be included in the Policy Letter, considering the evaluation and the outcome of consultation.

Phase 5 – Produce Policy Letter (Nov – Dec 2020)

Produce a Policy Letter which documents the outcome of the review and the CfESC's recommendation.

NB: The CfESC is under no obligation, and has made no commitment, to present the States with a single model to be accepted or rejected. The CfESC may present the States with alternative proposals (models) with a view to securing sufficient breadth of support for one of the models.

Stakeholder Engagement & Consultation

The following are stakeholder groups. While all will be engaged with during the review, some groups such as secondary staff and their union representatives will also take part in tailored consultation exercises at various phases of the review.

- All secondary school staff and their union representatives
- Guernsey Education Leadership Team (GELS)
- Students
- Secondary School leaders
- Parents/carers/general public
- Wider Education staff
- Policy & Resources Committee
- Other States departments
- States Members
- Douzaines and School Committees

An overview of the approach to consultation and engagement is included in Appendix 3.

Governance

Committee for Education, Sport & Culture:

The Committee is responsible and accountable to the States for the Review and the resultant Policy Letter. The Committee will direct all parts of the Review as it sees fit within the parameters set out in Resolutions made by the States on 3rd and 20th March 2020. The Committee will receive regular updates on progress made and next steps and these updates will normally be provided through a standing item on its agenda for each routine Committee meeting. Between scheduled Committee meetings, the President, Committee Secretary and Director of Operations will provide any political or operational "steering" which is necessary to ensure the Committee's directions and the States Resolutions are being fulfilled. In directing the review and formulating final propositions for submission to the States, the Committee will consider the results of consultation and engagement which is to be carried out in accordance with the aforementioned Resolutions of the States.

The following areas of work will be led by the following:

- Senior Responsible Officer/Project Manager:** Steve Foote
- Communications, Consultation & Engagement:** Joel de Woolfson (States' Communications Team)
- Technical analysis of education models:** Louisa Aron

The work will be supported by the Executive Head Teacher, Liz Coffey, Designate Principals Vicky Godley and Kieran James and Interim Principals Martin Haines and Verona Tomlin.

NB: The Senior Responsible Officer/Project Manager (SRO/PM) will be responsible for making sure that the Group for Education Leadership & Strategy (GELS) is fully sighted on progress of the review through weekly briefings so that the Committee can be confident that the review has benefited from the combined educational experience of that group. The SRO/PM will also be responsible for making sure that all policy decisions are routed through the Committee. In between routine Committee meetings, the President may require updates or wish to discuss next steps, collectively or individually, with any of the advisors listed above, but this shall not be in place of all policy decisions being in the remit of the Committee.

Independence

The Committee has made a commitment to ensure that the review includes independent voices and will do this through:-

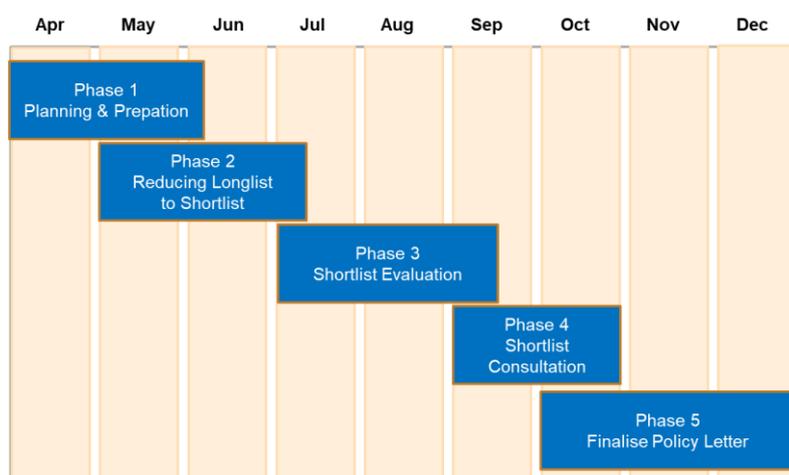
- **Oversight** – an individual to ensure that the review is conducted in such a way that it is transparent, objective and consistent with the terms of reference and that any conclusions drawn are evidence-led. (The CfESC is currently looking for suitable candidates to fulfil this role).
- **Facilitation** – A trained facilitator should be used to facilitate meetings and workshops with teachers, support staff and their union representatives to ensure that meetings are conducted in a way that encourages debate and ensures all views are heard.
- **Technical analysis** –An independent specialist in Education will verify the technical analysis to ensure that it is robust, accurate and considers all required criteria.

RISKS

Risk	Mitigation
Covid-19	
States Financial position has changed considerably as a result of the economic measures, and this must be taken into consideration into the objectives of the review and the evaluation of options.	As part of the review, include consideration of the potential of options to contribute to economic regeneration following the pandemic. The costs of the review should be kept to a minimum, particularly limiting the use of external advisers.

Stakeholder engagement is more challenging remotely	Set up discussions with NCTLG to discuss the potential for using MS Teams for consultation during the lockdown. This risk has been successfully resolved.
P&R have instigated a 'pause and review' of all transformation programmes	Officers of P&R have advised that the Secondary review may continue pending the transformation review process as long as no new financial commitments are made. The approach has been designed to minimise the amount of external commitments required. The CfESC have now submitted a formal response to P&R's transformation 'pause and review'.
Consultation	
In the absence of timely communication on the review's terms of reference and approach to consultation, unions and staff may suspect that the review is proceeding without any engagement.	Communicate Terms of Reference, plan and consultation approach to NCTLG and school staff.
Consultation with school staff may not be possible during school holidays	Organise the approach so that the majority of consultation will take place during term time.

OUTLINE PLAN



- See Appendix 1 for a more detailed breakdown.

NEXT STEPS

- Finalise candidates to fulfil the Independence roles outlined above.

APPENDIX 1: HIGH LEVEL PLAN

APPENDIX 1: PLAN	2020											2021	
	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb		
Summer break													
Deadline for Secondary Review Policy Letter													
Mobilisation													
Finalise Terms of Reference for Review													
Agree consultation approach with stakeholders													
Develop Plan & Costings													
Develop Resource Plan													
Confirm funding approach													
Prepare for consultation													
Prepare consultation materials													
Consultation - Lessons Learnt & Terms of Reference													
Agree approach to consultation													
Prepare Evaluation Framework													
Locate all previous models													
Prepare financial model for 3 & 4 college options													
Update models with 2019 population projections													
Prepare Evaluation Criteria & Key Principles													
Review Investment Objectives & CSFs													
Staff Survey													
Agree baseline assumptions - curriculum, population, space standards, staffing, length of school day, etc													
Update all models with consistent assumptions													
Review and validate													
Discussion of model-independent considerations (space standards, enrichment, one school, etc)													
Review of Longlist													
Prepare longlist of options													
High level evaluation against Evaluation Criteria													
Review and consult on longlist													
Generate shortlist													
Review of Shortlist													
Detailed analysis of shortlist options													
For each model:-													
- Derive Space Requirements													
- Generate Build Cost Estimates based on m2													
- Traffic Impact Assessment (high level)													
- Define Capital Costs													
- Develop Transition Model													
- Development Implementation Plan													
- Develop Transition Resource Plan													
- Define Staffing Structure(s)													
- Develop Revenue Model													
- Benefits Evaluation													
- Risk Assessment													
- Impact Assessment on TEP													
Compare/ Evaluate options													
Develop Recommendation													
Shortlisting Review workshop(s) with key stakeholders													
Consultation on shortlist review													
Develop recommendation													
Consider impact on extending BAU													
Consultation with stakeholders													
Write Policy Letter													
Develop Policy Letter													
ESC Committee final review													
P&R Review													
Submit Policy Letter													
States Debate Policy Letter													
Develop Next Steps													
Identify impact on TEP													
Review impact on programme plan/ timeline													
Review impact on resource plan													
Develop funding request													

APPENDIX 2: STATES RESOLUTIONS (20 March 2020)

Res.		Relevant deliverables
1	Continue the development of a Single Secondary School operating across a number of sites	N/A
2	Policy Letter to include revisions to timeline and budget for The Guernsey Institute	The Guernsey Institute Outline Business Case
3	Policy Letter to include revisions to timeline and budget for La Mare de Carteret Primary School	Updated Programme Plan
4	Transfer of funds from 11-18 School to Digital Roadmap	Completed
5	Confirming models to be compared against 'benchmark' two colleges model	Secondary Review Terms of Reference (this document)
6	Baseline assumptions and evaluation criteria	Baseline assumptions – see Phase 1 Evaluation criteria – see Phases 1 & 3
7	Consultation with unions and staff about space standards, configuration of space and day-to-day operation of schools	Phase 1 – Consultation on baseline assumptions and evaluation criteria Phase 4 – Shortlist Consultation
8	Committee	N/A
9	Submit Policy Letter for debate no later than April 2021.	See Approach and High Level Plan
10	Stakeholder engagement plan	Phase 1 (see Appendix 4)
11	Funding (negative)	
12	Deferral of revenue savings	Phase 3 – Shortlist Evaluation

APPENDIX 3: CONSULTATION & ENGAGEMENT APPROACH

Stakeholder Group	Review Phase	Consultation/ Engagement/ Comms activities
GELS	All	Consultation on Terms of Reference, key deliverables and Committee papers
Secondary School Leaders	All	Regular updates on progress Consultation on key deliverables
Secondary teachers and in-school support staff	Preparation	Survey about education priorities Two infographics (one explaining the States' decision on the review and one on the need for change) Feedback from survey
	Shortlist Consultation	Consultation via workshops on SWOT Analysis, Financial evaluation and trade-offs Feedback on consultation workshops Results of workshops will feed into Committee's recommendations to the States
Unions (NCTLG)	Preparation	Regular meetings (minimum once every two weeks) Exchange of Lessons learned and discussion Consultation on Terms of Reference for the review Consultation on communications strategy Consultation on secondary staff survey about education priorities Consultation on survey for primary and SEND school staff
	Longlisting	Consultation on key policy decisions Regular meetings (minimum once every two weeks)
	Shortlist Consultation	Consultation on SWOT Analysis, Financial evaluation and trade-offs Regular meetings (minimum once every two weeks)
Wider Education staff	Preparation	Survey for wider education staff Feedback from survey Regular updates on progress
Students	All	Regular updates on progress, utilising assemblies or by encouraging students to submit questions Develop additional ways to meaningfully engage with students
Parents/carers/general public	All	Regular updates on progress Publish Terms of Reference Publish infographic explaining States' decision on the review

		Publish infographic explaining why there is a need to change
Policy & Resources Committee	Planning	Agree funding
	Longlisting	Consultation on key policy decisions
	Shortlist Consultation	Consultation on SWOT Analysis & Financial Evaluation
	Policy Letter	Review of Policy Letter for comment
States Members	Planning	Update on Terms of Reference, Consultation Approach, Progress Overview and Baseline Assumptions
	Longlisting	Update on key policy decisions, utilising President update statements in the States
	Shortlist Consultation	Discussions on SWOT Analysis, Financial Evaluation & trade-offs (potential for in-person briefings, to allow for Q&A)
Other States departments	Shortlisting Evaluation	Consultation on evaluation for relevant areas (eg. Traffic & Highway Services on traffic impact, etc).
Douzaines & School Committees	Policy Letter	Presentations on the models and options

APPENDIX 4: LIST OF DELIVERABLES

In order to deliver the review called for by Resolutions 2 & 3 of the Requête, we will need to deliver the following:-

1. PLANNING & PREPARATION

- Agree Terms of Reference for the review (this document)
- Agree Consultation approach
- Develop Plan & Costings
- Confirm Funding approach
- Finalise funding
- Mobilise team
- Prepare for consultation
 - Prepare consultation materials
 - Consultation 1 – Lessons learnt & terms of reference
 - Agree Consultation principles
 - Initial Staff Survey
- Prepare Evaluation Framework
 - Locate previous models
 - Prepare financial model for 3 school options
 - Update models with 2019 Student projections & Buy-out%
- Prepare evaluation criteria & key principles
 - Review Investment Objectives & Critical Success Factors
 - Agree baseline assumptions to be included in models
- Update all models with consistent assumptions

2. LONGLIST REDUCTION

- Prepare Longlist of options (including site permutations)
- High level evaluation of models pros/cons
- Reduce Longlist through consultation and policy decisions
- Generate shortlist (sites/forms of entry per model)

3. SHORTLIST EVALUATION

Detailed analysis of shortlisted options

For each model consider:-

- Space requirements
- Generate Build Cost Estimates based on space requirements
- Traffic Impact Assessment (high level)
- Capital Costs

- Updated Programme Plan
- Transition Resource Plan
- Staffing Structure(s)
- Revenue Model
- Evaluation Criteria/ Benefits
- Risk Assessment
- Impact Assessment on Transforming Education Programme

4. SHORTLIST CONSULTATION

- Shortlist review workshop(s) with key stakeholders
 - Consultation and engagement on shortlist
 - Operational implications and trade-offs
- Update evaluation with results of consultation
- Develop recommendation

5. PRODUCE POLICY LETTER

- Development of Policy Letter
- Review with P&R for Letter of Comment
- Submit Policy Letter
- States debate Policy Letter