



**Notice of meeting of
Learning & Culture Overview & Scrutiny Committee**

To: Councillors Reid (Chair), Cunningham-Cross (Vice-Chair), Brooks, Fitzpatrick, Jeffries, Levene, Taylor and Watson

Date: Wednesday, 7 December 2011

Time: 5.30pm

Venue: The Guildhall

AGENDA

1. **Declarations of Interest** (Pages 3 - 4)
At this point Members are asked to declare any personal or prejudicial interests they may have in the business on this agenda.
2. **Minutes** (Pages 5 - 12)
To approve and sign the minutes of the meeting held on 28 September 2011.
3. **Public Participation**
At this point in the meeting, members of the public who have registered their wish to speak on an item on the agenda or an issue within the committee's remit can do so.

Anyone who wishes to register or who requires further information is requested to contact the Democracy Officer for this meeting, details of whom are listed at the foot of this agenda.

The deadline for registering to speak is 5.00pm the working day before the meeting, in this case **5.00pm on Tuesday 6 December 2011.**

4. 2011/12 Second Quarter Financial Monitoring (Pages 13 - Report - Lifelong Learning & Culture and 18) Children & Young People's Services

This report analyses the latest performance for 2011/12 and forecasts the outturn position by reference to the service plan and budgets for all of the relevant services falling under the responsibility of the Director of Adults, Children & Education and the Director of Communities & Neighbourhoods.

5. Presentation on Corporate Parenting

Members are to receive a presentation in support of the Committee's forthcoming view on Corporate Parenting.

6. Review of Demographics for York Primary (Pages 19 - Schools - Interim Report 72)

This report formally presents the information provided to date in support of this review. Members are asked to agree the remit and identify what, if any, additional information is required to support their work on the review.

7. Scrutiny Topic Assessment - York Museums (Pages 73 - Trust 96)

This report presents the York Museum Trust scrutiny topic proposed by Councillor Watson together with background information on the formation of the Trust and its performance.

8. Learning and Culture Overview and Scrutiny (Pages 97 - Committee Workplan 2011-12 98)

Members are asked to consider the Committee's workplan for the 2011-12 municipal year.

9. Urgent Business

Any other business which the Chair considers urgent under the Local Government Act 1972

Democracy Officers

Catherine Clarke and Louise Cook (job share)

Contact details:

- Telephone – (01904) 551031
- Email catherine.clarke@york.gov.uk and louise.cook@york.gov.uk

(If contacting by email, please send to both Democracy officers named above).

For more information about any of the following please contact the Democracy Officers responsible for servicing this meeting, as listed above.

- Registering to speak
- Business of the meeting
- Any special arrangements
- Copies of reports

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- register by contacting the Democracy Officer (whose name and contact details can be found on the agenda for the meeting) **no later than 5.00 pm** on the last working day before the meeting;
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The majority of councillors are not appointed to the Cabinet (39 out of 47). Any 3 non-Cabinet councillors can 'call-in' an item of business from a published Cabinet (or Cabinet Member Decision Session) agenda. The Cabinet will still discuss the 'called in' business on the published date and will set out its views for consideration by a specially convened Scrutiny Management Committee (SMC). That SMC meeting will then make its recommendations to the next scheduled Cabinet meeting in the following week, where a final decision on the 'called-in' business will be made.

Scrutiny Committees

The purpose of all scrutiny and ad-hoc scrutiny committees appointed by the Council is to:

- Monitor the performance and effectiveness of services;
- Review existing policies and assist in the development of new ones, as necessary; and
- Monitor best value continuous service improvement plans

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Learning and Culture Overview & Scrutiny Committee 2011-12

Agenda Item 1 – Declarations of Interest

Please state any amendments you have to your declarations of interest.

Committee Members

Cllr Fitzpatrick Member of York Theatre Royal Board

Substitutes

N/A

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City of York Council

Committee Minutes

MEETING	LEARNING & CULTURE OVERVIEW & SCRUTINY COMMITTEE
DATE	28 SEPTEMBER 2011
PRESENT	COUNCILLORS REID (CHAIR), BROOKS, JEFFRIES, LEVENE, TAYLOR, WATSON, BURTON (AS A SUBSTITUTE FOR CLLR CUNNINGHAM-CROSS) AND DOUGLAS (AS A SUBSTITUTE FOR CLLR FITZPATRICK)
APOLOGIES	COUNCILLORS CUNNINGHAM-CROSS AND FITZPATRICK

14. **DECLARATIONS OF INTEREST**

At this point, Members were asked to declare any personal or prejudicial interests they might have in relation to the business on the agenda or any other general interests they might have on issues within the remit of the Committee.

Councillor Douglas declared a personal non prejudicial interest in agenda item 6 (Presentation on Demographics in York Schools) as her son attends a York primary school.

15. **MINUTES**

RESOLVED: That the minutes of the meeting of the Learning and Culture Overview and Scrutiny Committee held on 3 August 2011 be approved and signed by the chair as a correct record.

16. **PUBLIC PARTICIPATION**

It was reported that there had been no registrations to speak under the Council's Public Participation Scheme.

**17. YORK MUSEUMS TRUST PARTNERSHIP DELIVERY PLAN:
2010/2011 END OF YEAR PERFORMANCE UPDATE**

Members considered a report which updated them on the current progress of the York Museums Trust (YMT) towards meeting the targets agreed in the Partnership Delivery Plan (PDP)

Members were reminded that under the terms of the funding agreement between the Council and YMT, it was now time to negotiate priorities for the next 5 year period (2013-18) and members of the Committee were invited to give their views with regard to what those priorities should include.

The Chief Executive of YMT gave a presentation to members. She provided a background to the creation of the Trust and explained what work had been undertaken by the Trust at the Castle Museum, Art Gallery, York St Mary's and Yorkshire Museum, particularly over the last six months, to address the target areas reflected in the PDP. She also provided an outline of what they would be developing moving forward. She responded to queries from Members regarding information contained in the report.

With regard to paragraph 21 (f) of the current PDP (The Business Plan) Members noted that some answers were still missing and asked for further information around the business plan.

Members noted that the draft 5 year plan from 2013-2018 would be presented to Cabinet in December 2011 and agreed to pass any comments on this plan to the Head of Arts and Culture before its presentation to Cabinet.

The Chief Executive of the YMT asked if Members would be interested in a tour of any of the buildings within the Trust's portfolio and Members agreed that this would be beneficial and suggested a tour of the castle museum in the first instance.

RESOLVED: (i) That the report and annexes be noted and that Members comments be taken into consideration.

(ii) That Members forward any comments on the draft PDP 2013-18 to the Head of Arts and Culture

(iii) That a tour of the Castle Museum be arranged for Members of the Committee.

REASON: To fulfil the Council's role under the partnership delivery plan.

18. PRESENTATION ON THE DEMOGRAPHICS IN YORK PRIMARY SCHOOLS

Members received a presentation which set out the demographic trends in the city which are increasing demand for primary school places and provided an overview of school admission arrangements across the city.

The School Admissions, Directorate Support and Community Transport Manager circulated a briefing note on admissions arrangements for York primary schools as well as a spreadsheet containing data for the September 2011 intake showing which Primary and Infant Schools in York were oversubscribed and the nature of their oversubscription. A map showing the location of the schools within the city boundaries was also circulated for Members information. With reference to the briefing note, he explained the current primary school admission arrangements (oversubscription criteria) and advised Members which oversubscribed schools had insufficient places for "catchment" or "sibling" applications and how many oversubscribed schools had had to refuse pupils on other grounds.

The Policy Support Manager provided information on supply and demand for primary school places in the city. He explained that due to an increasing birth rate and additional housing in the city (as a result of new housing completions), the intakes into some schools were starting to rise which in the future could lead to there being more reception children than places available in schools.

The Head of School Services and Directorate Support advised it would be useful to debate in more detail issues such as whether the admission criteria should be revisited (looking at questions

such as “should catchment areas be retained?” “Should “catchment” still take priority over “siblings” in the oversubscription criteria? and are school travel policies fair and appropriate given the changing demography?

The Committee agreed that it would be useful to have a further session to debate in more detail the oversubscription criteria and school travel policies and to gauge Members views regarding these issues . Officers recommended that two primary school head teachers be invited to attend this session to offer their views on these issues.

- RESOLVED:
- (i) That officers be thanked for a useful presentation on demographics in York schools.
 - (ii) That Members receive further information in relation to oversubscription criteria and school travel plans at the information gathering session to be held on 2 November 2011 and that two primary school head teachers be invited to this session to give their views.

REASON: In order to provide Members with an introduction to the subject which has been selected for a scrutiny review.

19. 2011/12 FIRST QUARTER FINANCIAL MONITORING REPORT -LIFELONG LEARNING & CULTURE AND CHILDREN & YOUNG PEOPLE'S SERVICES

Members considered the first quarter financial monitoring report for Lifelong Learning and Culture and Children and Young People’s Services.

The Head of Finance (Adults, Children and Education) advised Members that the report comprised an extract from a report which was presented to Cabinet on 6 September and which set out the financial pressures affecting the two directorates.

In response to a query from Members, the Director of Adults Children and Education explained that the increase in looked after children in York was due to a national increase in looked

after children as a result of changes in national guidance on how 16 and 17 year olds are dealt with. He advised that this age group was now dealt with as part of the Children's Act legislation and not Housing Act legislation as previously. Members noted that although fluctuations in numbers in this area were very small, they produced a large budgetary pressure.

RESOLVED: That the report be noted.

REASON: To update the committee on the latest finance position for 2011-12.

20. UPDATE ON IMPLEMENTATION OF RECOMMENDATIONS FROM PREVIOUSLY COMPLETED SCRUTINY REVIEW ON CULTURAL QUARTER

Members received a report which provided them with an update on the implementation of the outstanding recommendations arising from two previously completed scrutiny reviews, namely the Cultural Quarter review and the Casual Play review.

The Head of Arts and Culture provided an update on the outstanding recommendations in relation to Cultural Quarter review. She advised Members that the majority of recommendations had been taken forward by City Strategy officers as part of ongoing work around New City Beautiful – A Vision for York and the City Centre Area Action Plan.

The Head of Play provided an update on the outstanding recommendations in relation to the review of Casual Play. She advised Members that they were still in the early stages of implementing recommendation 2 and asked that she be given the opportunity to report back to the Committee at a future meeting on this recommendation.

RESOLVED: (i) That, in relation to the Cultural Quarter review:

a) outstanding recommendation 1 be written off as fully implemented.

b) outstanding recommendations 2 & 3 remain as not being fully implemented

and an update be provided by City Strategy officers with responsibility for the LDF and New City Beautiful to a future meeting in approximately 6 months time.

c) outstanding recommendations 5 & 7 be written off as fully implemented.

(ii) That, in relation to the Casual Play review:

a), outstanding recommendation 1 i),ii) and iii) be written off as fully implemented..

b) an update on outstanding recommendation 2 be provided to the Committee at a later date as this recommendation was not yet fully implemented.

REASON; To raise awareness of those recommendations which have still to be implemented and those which can be signed off.

21. LEARNING AND CULTURE OVERVIEW AND SCRUTINY COMMITTEE WORKPLAN 2011-12

Members considered the Committee's work plan for the municipal year 2011-12.

The Scrutiny Officer reminded Members that the visit to the York Theatre Royal would take place on the evening of Tuesday 11 October.

With regard to the Demographics Review, Members were informed that there would be no published agenda for the information gathering session on 2 November 2011.

Members noted that they would receive a presentation on Corporate Parenting at their meeting on 7 December 2011. They acknowledged that the following meeting, on 25 January 2012, already had a full agenda and agreed that an additional meeting may be required to allow enough time to discuss Corporate Parenting.

The Committee were also advised that a presentation on parks may be added to the work plan for the January meeting.

RESOLVED: That the work plan be updated as agreed.

REASON: To progress the work of the Committee.

Councillor A Reid, Chair

[The meeting started at 5.00 pm and finished at 7.15 pm].

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Learning & Culture Overview & Scrutiny Committee**07 December
2011**

Report of the Director of Adults, Children & Education and the Director of Communities & Neighbourhoods

**2011/12 SECOND QUARTER FINANCIAL MONITORING REPORT –
LIFELONG LEARNING & CULTURE AND CHILDREN & YOUNG
PEOPLE'S SERVICES****Summary**

- 1 This report analyses the latest performance for 2011/12 and forecasts the financial outturn position by reference to the service plan and budgets for all of the relevant services falling under the responsibility of the Director of Adults, Children & Education and the Director of Communities & Neighbourhoods.

Financial Analysis

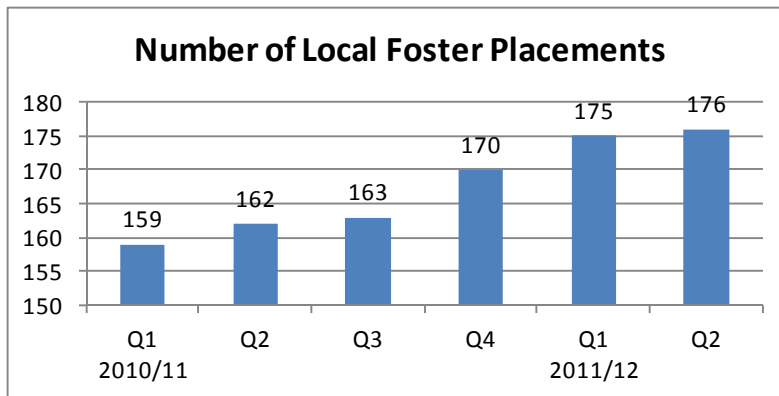
- 2 Communities & Neighbourhoods are predicting early financial pressures within Lifelong Learning & Culture of £176k. This is primarily due to a projected overspend within Arts and Culture Education (£187k) and is a result of the restructure going live from the beginning of the academic year and one off redundancy costs.
- 3 In order to mitigate the pressures, the directorate is limiting expenditure to a minimum, however it is unable to do so in all circumstances, for example where contractual obligations prohibit this. Service managers are also drawing up proposals, some of which may require a political decision and will therefore be brought before the appropriate committee when necessary.
- 4 There are a further £690k of net pressures within Children & Young People's budgets, made up of the following significant variations:
- 5 The number of children currently under the care of the council is considerably higher than predicted when the 2011/12 budget was set and as a result is contributing to the directorate's financial pressures. This increased caseload has resulted in additional in-year staffing costs

(£226K). The table below demonstrates the year-on-year increase in Looked After Children and associated financial costs.

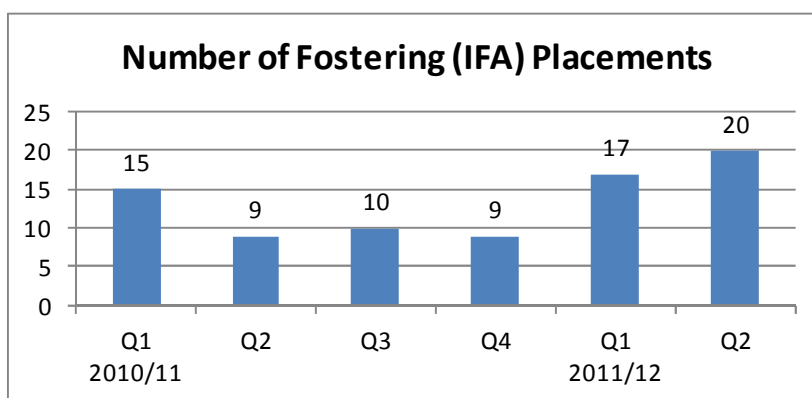
Numbers and average cost of Looked After Children in York

Year	No. of LAC	% change	Budget	Actual	Cost per Child	% change
2006-07	157	12%	£1,972,780	£2,998,715	£19,100	N/A
2007-08	168	7%	£3,083,130	£3,345,742	£19,915	4%
2008-09	199	16%	£3,468,020	£3,833,682	£19,265	-3%
2009-10	223	11%	£3,578,760	£4,501,280	£20,185	5%
2010-11	236	6%	£4,759,490	£4,666,303	£19,772	-2%
2011-12 (Q2)	250	6%	£4,326,600	£4,955,944	£19,824	0%

- 6 The number of children in local foster placements has increased from 162 when the budget for 2011/12 was set, to the present figure of 176, which is creating a pressure of £226k. The table below shows the increase on a quarter by quarter basis.



- 7 The number of children in Independent Fostering Agency placements is expected to exceed that provided for in the budget creating a pressure of £139k. The table below shows the increase on a quarter by quarter basis.



- 8 As well as a vacancy freeze and a moratorium on non essential expenditure, the directorate is also assessing 2012/13 savings proposals

that could be brought forward in order to help bring the budget back in line by the end of the financial year.

Performance Analysis

- 9 *Educational attainment:* York continues to improve in the attainment areas of key stage 4 (GCSEs) and key stage 2:
 - 62.1% of pupils achieved 5+ A*-C grades, including English & Maths (+3% from 09/10).
 - 27.8% of pupils achieved Level 5+ in both English and Maths (+3.6% from 09/10).
- 10 *The attainment gap* between children on free school meals (FSM) and those who are not, at KS4 has reduced. This is due to significant improvements in the results across a number of schools, especially *York High* where more than half of FSM children achieved 5+A*-C grades. The KS2 attainment gap has however increased this year after a significant improvement last year and is a major priority for school improvement work in the coming year.
- 11 *NEETs:* The number of 16-18 year olds not in education, employment or training has increased to 6.4%. The increase is partly due to a change in the way the data is now calculated to only cover NEETs who are York residents. Previously, it included anyone coming to university and college institutions, but York's NEET rate is still one of the best in the North of England.
- 12 *Child Social Care:* The increase in the number of looked after children in council care has continued (see para 50) and this is affecting some areas of performance, with just under 19% of children now having been subject to a CPP for a second or more time against a target of 7% (lower is better). However, the proportion of child protection plans (CPP) lasting 2 years or more has reduced (1.3% compared to 3.9% in 2010/11) and the % of children social care referrals going on to initial assessment is at 61.4%, a significant improvement since Q1 (53.5%). Both these improvements relate to the new "front door" arrangements introduced earlier in the year.
- 13 *Parenting programmes:* The number of families attending targeted Parenting Programmes is over double target levels for Q2 (247 compared to target of 110). A new online referrals system has resulted in parents and carers being engaged in a programme which more accurately meets their needs. The online referrals received highlight that high numbers of parents have low mood/mental health issues, which are

impacting on their ability to parent effectively. Voluntary sector partners, Family Matters York, were successful in securing external funding to allow them to offer additional targeted programmes such as *'Time Out for Anger'* and *'Drug Proof Your Kids'*.

- 14 *Cultural and sports:* Visits to libraries decreased slightly in Q2, with 278,650 visits compared to 281,538 in Q2 2010/11. The closure of community libraries for a week each during Q2 to install self issue machines and public Wi-Fi impacted on the drop. Visits to swimming and sport centres have also decreased by 12% (186,618 for Q2, compared to 212,947 for the same period last year). This is in line with the national trend in swimming participation. The drop in visitor numbers is also partly due to the national abolition of the free swimming scheme for under 16's and over 60's from August 2010.

Corporate Priorities

- 15 The information included in this report demonstrates progress on achieving the council's corporate strategy (2009-12) and the priorities set out within it.

Implications

- 16 The financial implications are covered within the main body of the report. There are no significant human resources, equalities, legal, information technology, property or crime & disorder implications arising from this report.

Risk Management

- 17 A number of budgets are under pressure. On going work within the directorates may identify some efficiency savings in services that could be used to offset these cost pressures before the end of the financial year. It will also be important to understand the level of investment needed to hit performance targets and meet rising demand for key statutory services. Managing within the approved budget for 2011/12 is therefore going to be extremely difficult and the management teams will continue to review expenditure across the directorates.

Recommendations

- 18 As this report is for information only there are no specific recommendations.

Reason: To update the committee on the latest financial and performance position for 2011/12.

Contact Details

Authors:

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Adults, Children & Education
Tel No. 554225

Sarah Kirby
Principal Accountant
Communities &
Neighbourhood Services
Tel No. 551635

Chief Officers Responsible for the report:

Peter Dwyer
Director of Adults, Children and Education

Sally Burns
Director of Communities & Neighbourhood Services

Report Approved

Date *xx November 2011*

Specialist Implications Officer(s) None

Wards Affected: *List wards or tick box to indicate all*

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For further information please contact the authors of the report

Background Papers

2011/12 Finance and Performance Monitor 2, Cabinet 1 November 2011

Annexes

None

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Learning & Culture Overview & Scrutiny Committee

7 December 2011

Review of Demographics for York Primary Schools – Interim Report**Purpose of Report**

1. This report formally presents the information provided to date in support of this review. Members are asked to agree the remit and identify what if any additional information is required to support their work on the review.

Background to Review

2. At a scrutiny work planning event held in July 2011, Members of this committee discussed a range of possible topics for scrutiny review this municipal year. The issue of the changing demographics for York's primary schools was raised as a matter of concern and as a result it was agreed to proceed with this review.

Consultation

3. Senior officers working within School Organisation & Support have supported the work on the review to date. The committee have held two informal information gathering sessions. At the session held in November 2011 the Head teachers from Hempland Primary School and Scarcroft Primary School both attended to inform Members discussions.

York Primary Schools' Admissions Arrangements

4. The Local Authority (LA) is the admissions authority for all 43 Community and Voluntary Controlled Primary Schools (including Infant schools) across the LA area. The LA also coordinates the admissions process for all schools, whether Community, Voluntary Controlled, or Voluntary Aided.
5. The LA first established the policies upon which its admission arrangements are based in 2002, following extensive consultation. The principle behind the arrangements are that every child has a guaranteed place at the school where their home address falls within its

catchment area. However the arrangements include an equal preference system whereby parent/carers can select up to 5 schools for which they have a preference. Each of these preferences is considered by the LA and/or Voluntary Aided schools, but only one school is offered. This will be the highest ranked school that can be offered.

6. For September 2011 entry, the LA allocated 1,966 places. 93% of these allocations were for the parent/carers' first preference. 97% were allocated a school at either their first or second preference. Only 61 parent/carers appealed against the LA's decision, and of these, only 2 were successful. 80% of these appeals were heard on Infant Class Size grounds i.e. the limit of 30 pupils to one teacher in a class of 5, 6 or 7 year olds.
7. Where there are more applications for places than places available at any given school, applications are ordered according to the oversubscription criteria within a Local Authority's Admissions Policy. The criteria applies to both Community and Voluntary Controlled schools. If a child meets more than one criterion e.g. is both a sibling and resident in the catchment area, then they are categorised under the higher of the two priorities. However, the admission of pupils with a statement of special educational needs is covered by separate admission regulations which are allocated *before* the application of an LA's oversubscription criteria.
8. The oversubscription criteria in York are as follows:
 - *First priority: ('Looked After') Pupils looked after by a local authority* – this applies to all pupils who are in the care of a local authority or are provided with accommodation by the authority (see section 22 of the Children Act 1989);
 - *Second priority: ('Catchment') Pupils who live within the catchment area normally served by the school* – catchment areas are designated by the City of York Local Authority and are made available to parents via the annual Guide for Parents or from the School Services team;
 - *Third priority: ('Exceptional') Pupils considered by the Local Authority to have exceptional social or medical needs which relate to the preferred school* – the Local Authority may consult with other medical/educational professionals for a further opinion as to whether

a pupil should be allocated a place to an individual school due to a particular medical condition or social need;

- *Fourth priority: ('Siblings') Pupils with siblings at the school in September 2011* – siblings are defined as brothers or sisters living in the same house, as their primary place of residence, including half- and step-brothers or sisters;
- *Fifth priority: ('Distance') Pupils who live closest to the school using the nearest available safe walking route* - distances are measured by a GIS mapping system from the child's home address to the entrance of the school.

9. Faith Schools - Oversubscription Criteria

The seven Voluntary Aided Primary Schools in York are their own admissions authority, giving the highest priority to children of their respective faith(s). They also tend to prioritise children living in the relevant parish area, before children with siblings currently in attendance at their school. For their 2012-2013 admissions arrangements, 6 schools have placed 'catchment' before 'siblings', whilst only 1 school has placed the admission of siblings before children resident in the (parish) local area.

10. Waiting Lists

If after the allocation of places there are applicants who are unsuccessful in obtaining a place of their first preference (or a higher preference than they were allocated), then these applicants will form a waiting list.

11. Through the waiting list system, applicants who are unsuccessful on the offer day of 1 April may receive a place through either the independent appeals process, or through movement from waiting lists where applicants change their preferences, take up a place in the independent sector, or through movement in and out of the LA area.

Oversubscription in York - 2011-2012

12. For September 2011, 27 Primary and Infant schools were oversubscribed on 1 April 2011. However, by 1 September 2011, this had reduced to 24 schools. The table shown at Annex A provides data on the September 2011 intake including which Primary and Infant Schools in York were oversubscribed and the nature of their oversubscription.

13. Oversubscribed Schools refusing 'Catchment' or 'Siblings'
Two York primary schools (Hempland Primary School & Scarcroft Primary School) were oversubscribed and had insufficient places for all children who were 'siblings' i.e. the parents already had a child in attendance at the school, but did not live within the catchment area – see section 1 in Annex A.
14. Because both schools give a higher priority in their oversubscription criteria to 'catchment' children over 'siblings', those children were not allocated a place and were therefore offered a place at a school of a lower preference. For both schools the LA investigated to see if any additional pupils could be admitted to minimise unsuccessful sibling applicants.
15. In the case of Hempland Primary School, the admission limit of 60 places meant the admission of any further pupils would of breached Infant Class Size legislation, and so no further pupils could be admitted. Most siblings affected for 2011 lodged an appeal, but all were unsuccessful on Infant Class Size grounds.
16. For Scarcroft Primary School, the admission number of 45 was raised to maximise the number of children within Infant Class Size limits. At first, 46 children were admitted. This later rose to 48 children as places became available from other year groups. This was only possible because the school mixed classes in Reception, Year 1 and Year 2 to Infant Class Size limits. Despite having to refuse some catchment children on 1 April, those children were subsequently either offered a place at the school, or changed their preference to another school. There were 5 appeals for the school, all heard on Infant Class Size grounds, and all were unsuccessful.
17. Actions taken by the LA re: Oversubscription
Sections 2 & 3 of Annex A show that another 22 primary schools were oversubscribed for 2011-12. The LA had to act to increase the admission limit for 7 of those schools as well as for a further 4 schools who had some places available but would have been oversubscribed if action had not been taken.
18. The actions taken by the LA are identified in Column H of Annex A. The LA always works with a school to identify the most appropriate action required, and always takes into consideration the effects it may have on neighbouring schools. For this reason action is only usually

considered where there is an exceptional demand from within catchment, from siblings, or for children with 'exceptional' circumstances. For example, the increase from an admission limit of 30 places to 43 places at Fishergate Primary School meant that 33 'catchment' and 'sibling' children could be allocated a place. Without a raised admission limit, some siblings would have been refused a place. The coordinated move to an increased admission limit of 45 was achieved by working closely with neighbouring schools, particularly in supporting the admissions number at St George's RC Primary School (VA) nearby.

19. Similar interim action, achieved through discussions with school leadership was taken at Knavesmire Primary School, St Barnabas CE Primary School and Dunnington CE Primary School to support 'catchment' and 'siblings' for 2011/12.
20. In addition to raising admission limits where demand existed from within catchment or from siblings, the LA also took some further steps including:
 - Changing the Guide for Parents and Admissions letters to include specific guidance on the potential for siblings being unsuccessful in future years.
 - Increasing the number of preferences from 3 to 5 to increase parental preference and reduce 'unplaced' (un-preferenced) allocations.
 - Longer term place planning, including increasing the size of the intake, where this is possible – often from 30 to 45, particularly in areas currently short of places.

21. Understanding Supply & Demand

At a meeting in September 2011 the committee received a detailed presentation on primary school demographics across York giving context to the issues around supply and demand– see copy at Annex B.

Issues Arising

22. Having considered all of the information presented in support of the review topic, the Committee agreed to focus their review on the examination of whether:

- a) The oversubscription criteria in use in York's Community and Voluntary Controlled schools is made up of the right priorities, in the right order?
 - b) The current School Travel Policies are fair and appropriate given the changing demographics?
23. In support of the committee consideration of the two objectives, a second informal information gathering session was held in November 2011 attended by Head Teachers from Hempland Primary School and Scarcroft Primary School.

Objective A - The Oversubscription Criteria

24. The committee received information relating to an objection raised in 2009 by two qualified parents, who were concerned with the low priority attached to children who have siblings attending their parents' preferred school – see Annex C.
25. The Committee noted that the Adjudicator determined that York's admission arrangements were compliant with the mandatory requirement set out in paragraph 1.72 of the Schools Admissions Code, and therefore fair and equitable, due to the fact that they operated on a consistent basis across the City, ensuring every family had a priority for admission to at least one local school.
26. For comparison purposes, the Committee also received a breakdown of the oversubscription criteria in use by other similar sized / neighbouring local authorities – see Annex D. It was noted that like York, half of the local authorities compared, gave a higher priority to children living within a school's catchment area rather than those with siblings already in a school. Also, that one council (North Yorkshire County Council) did not prioritise siblings within their oversubscription criteria at all.
27. The head teachers provided details of the issues they had faced around their oversubscription in 2011-12 (see paragraphs 13-15 above). They highlighted the impact on parents of the order of priorities within the LA's oversubscription criteria. For example, both schools had experienced parents with children (siblings) at different schools questioning whether the schools had done enough to help them. Whilst both head teachers recognised the difficulties those parents faced, they also commented on the strength of feeling that children should have access to their local schools. On that basis they agreed that catchment

should remain a higher priority than siblings. Both head teachers were also keen to point out the impact of having infant class sizes at the maximum of 30, and the adversity they were likely to face in later school years in trying to maintain the quality of education they currently provide, particularly in classes with mixed school years.

28. The Committee noted that catchment areas for LA primary schools do not overlap and that a majority of voluntary aided schools have no catchment areas. They also reflected on the predictions for growth across the city and the impact that would have on the demographics, particularly in the South Bank area where an expansion of the existing schools or a new school may be required in the future, which would require significant funding. Finally the Committee recognised that in some areas of the city under-subscription may also become a concern in the future, which in turn may lead to some small primary schools becoming unsustainable.

Objective B - School Travel Policies

29. The national policy on the provision of free school transport specifies that children from low income families will qualify for free transport if they live more than 2 miles and less than 15 miles from the school. In regard to free school transport for denominational places, Members were informed that the national policy states its provision is discretionary therefore Local Authorities do not have to provide it, they only have to give its provision due consideration.
30. City of York Council have agreed that free transport will be provided for denominational places for those children who live more than 3 miles and less than 15 miles from a qualifying school. The relevant extract from the Council's Home to School Transport Policy 2011/12 relating to this provision, and comparative information on the policies of other Local Authorities was presented at the information gathering session held in November – see annexes E & F.
31. Members also received information on the numbers and costs of free school transport for 2010-11. They noted that these were not just for the provision of free transport to children with denominational places but also for those with special needs and for geographical distance reasons. They therefore requested a further breakdown of those figures. – see Annex G.

32. Finally, whilst respecting parent's choice, Members questioned whether the current arrangements were fair and equitable and in support of their examination of the second objective, requested the following additional information:

- the possible consequences of stopping the provision;
- the costs of a phased withdrawal of the transport currently being provided on a denominational basis and;
- a comparison with the provision of free school meals

33. Work is ongoing to gather the requested information with the intention of tabling at this meeting.

Suggested Way Forward

34. To progress the work on this review, Members will need to identify what if any additional information is required. It may also be beneficial to hold an additional meeting outside of those currently in the workplan, in order that this review may be concluded early in the new year to allow the Committee to commence work on their Review of Public Parks.

Recommendation

35. Having considered all of the information provided to date, Members are recommended to agree:

- i) a formal remit for the review based on the two objectives outlined in paragraph 22 above.
- ii) An additional meeting date in early January 2012 to receive information outlined in paragraph 37 above and to conclude the work on this review.

Contact Details

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Report Approved

Date 15 Nov 2011

Wards Affected:

All

For further information please contact the author of the report

Background Papers: N/A

Annexes

Annex A – Table showing Data on September 2011 Intake

Annex B – Presentation on Primary School Demographics across York

Annex C – National Adjudicator Determination September 2009

Annex D – Comparison Data for Oversubscription Criteria

Annex E – Extract from CYC Home to School Transport Policy

Annex F – Comparison Data for Home to Denominational School Transport

Annex G – Breakdown of CYC Denominational Transport Numbers & Costs
2010/11

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School	(A) School Type	(B) Published Admission Number	(C) 2011/12 Admission Number	(D) Number of Places Allocated	(E) SEN	(F) Allocated by Criteria					(G) Waiting List by Criteria					(H) Action Taken by LA for...						
						1 - Looked After	2 - Catchment	3 - Exceptional	4 - Sibling	5 - Distance	1 - Looked After	2 - Catchment	3 - Exceptional	4 - Sibling	5 - Distance	Catchment/Village	Service Families	Siblings	Shortage of Spaces in Neighbouring Areas	Late/Non-applicants	Future Increase/Class Organisation	Not possible - Infant Class Size legislation
(1) LA/VC - Oversubscribed and refusing 'Catchment' and/or 'Sibling' applicants																						
Hemland Primary School	LA	60	60	60	0	0	60	0	0	0	0	1**	0	8	11					Y		
Scarcroft Primary School	LA	45	48*	48	0	0	47	1	0	0	0	0	0	4	13	Y		Y				
(2) LA/VC - Oversubscribed. Planned admission number is lower than Catchment + Sibling, but not refused any Catchment or Sibling in 2011/2012																						
Dunnington Ce Primary School	VC	30	34*	34	0	0	31	0	3	0	0	0	0	0	1	Y						
Knavesmire Primary School	LA	30	52*	52	0	0	42	0	1	9	0	0	0	0	8	Y			Y			
Robert Wilkinson Primary School	VC	75	81*	81	0	0	75	0	1	5	0	0	0	0	1	Y	Y					
Rufforth Primary School	LA	10	12*	12	0	0	10	1	1	0	0	0	0	0	3	Y						
St Barnabas C Of E Primary School	VC	20	25*	25	0	0	17	0	5	3	n/a					Y		Y	Y			
St Marys Ce Primary School	VC	15	16*	16	0	0	14	0	2	0	0	0	0	0	3			Y				
(3) LA/VC - Oversubscribed. Planned admission number is higher than Catchment + Sibling																						
Clifton with Rawcliffe Primary	LA	90	90	90	1	0	65	0	4	20	0	1**	0	0	6					Y		
Dringhouses Primary School	LA	45	45	45	0	0	27	0	9	9	0	1**	0	0	6					Y		
Headlands Primary School	LA	45	45	45	1	0	34	0	5	5	0	3**	0	0	1					Y		
Hob Moor Community Primary School	LA	45	45	45	1	0	26	1	11	6	0	0	0	0	7					Y		
Osaldwick Primary School	LA	30	30	30	0	0	15	0	6	9	0	0	0	0	5					Y		
Park Grove Primary School	LA	38	38	38	0	0	19	0	10	9	0	4**	0	0	3					Y		
Poppleton Ousebank Primary School	LA	60	60	60	0	0	48	0	4	8	n/a									Y		
Poppleton Road Primary School	LA	60	60	60	0	0	21	1	18	20	0	0	0	0	7					Y		
Ralph Butterfield Primary School	LA	50	50	50	0	0	34	0	6	10	0	0	0	0	1					Y		
St Pauls Ce Primary School	VC	25	25	25	1	0	10	0	8	6	0	0	0	0	10					Y		
Westfield Community Primary School	LA	90	94*	94	0	0	82	0	7	5	0	0	0	0	1			Y	Y			
Yearsley Grove Primary School	LA	60	60	60	0	0	31	0	17	12	n/a									Y		
(4) LA/VC - Places Available																						
Acomb Primary School	LA	30	35*	34	0	0	19	0	4	11	n/a					Y			Y			
Badger Hill Primary School	LA	30	30	12	0	0	1	0	4	7	n/a									Y		
Bishopthorpe Infant School	LA	60	60	58	0	0	33	0	5	20	n/a									Y		
Burton Green Primary School	LA	30	30	27	0	0	20	0	2	5	n/a									Y		
Carr Infant School	LA	70	70	69	0	0	50	0	5	14	n/a									Y		
Clifton Green Primary School	LA	50	55*	54	0	0	28	0	6	20	n/a					Y				Y		
Copmanthorpe Primary School	LA	60	60	51	1	0	37	0	2	11	n/a									Y		
Derwent Infant School	LA	40	40	11	0	1	10	0	0	0	n/a									Y		
Elvington Ce Primary School	VC	20	20	16	0	0	13	0	1	2	n/a									Y		
Fishergate Primary School	LA	30	43*	41	0	0	29	0	4	8	n/a						Y	Y	Y	Y		
Haxby Road Primary School	LA	30	35*	32	0	0	19	0	2	11	n/a							Y	Y	Y		
Huntington Primary School	LA	60	60	50	0	0	33	0	4	13	n/a										Y	
Lakeside Primary School	LA	60	60	46	0	0	34	0	5	7	n/a										Y	

*Action taken by LA/School to temporarily increase planned admission number for 2011/2012

** Where Catchment children are on a waiting list, these applications will be late/changes to circumstances after initial allocations at 01 April 2011

School	(A) School Type	(B) Published Admission Number	(C) 2011/12 Admission Number	(D) Number of Places Allocated	(E) SEN	(F) Allocated by Criteria					(G) Waiting List by Criteria					(H) Action Taken by LA for...						
						1 - Looked After	2 - Catchment	3 - Exceptional	4 - Sibling	5 - Distance	1 - Looked After	2 - Catchment	3 - Exceptional	4 - Sibling	5 - Distance	Catchment/Village	Service Families	Siblings	Shortage of Spaces in Neighbouring Areas	Late/Non-applicants	Future Increase/Class Organisation	Not possible - Infant Class Size legislation
(4) LA/VC - Places Available (continued...)																						
Naburn Ce Primary School	VC	12	12	11	0	0	8	0	1	2	n/a											Y
New Earswick Primary School	VC	30	30	25	0	0	16	0	1	8	n/a											Y
Skelton Primary School	LA	20	20	11	0	0	9	0	1	1	n/a											Y
St Oswalds Ce Primary School	VC	42	42	40	0	0	12	0	9	19	n/a											Y
Stockton On The Forest Primary School	LA	12	12	10	0	0	7	0	1	2	n/a											Y
Tang Hall Primary School	LA	30	30	22	0	0	6	0	4	12	n/a											Y
Wigginton Primary School	LA	40	40	38	0	0	27	0	4	7	n/a											Y
Woodthorpe Primary School	LA	70	70	50	0	0	30	0	9	11	n/a											Y

School	(A) School Type	(B) Published Admission Number	(C) 2011/12 Admission Number	(D) Number of Places Allocated	(E) SEN/Looked After/Exceptional	(F) Allocated by Criteria					(G) Waiting List
						Religion/Faith	Catchment	Other Faith	Sibling	Other/Distance	
(5) VOLUNTARY AIDED - Oversubscribed											
Heworth CE Primary School	VA	20	20	20	0	8	0	0	4	8	13
St Lawrences Ce Primary School	VA	30	30	30	1	0	10	0	15	4	5
St Wilfrids Rc Primary School	VA	40	40	40	0	39	0	0	1	0	11
Wheldrake Ce Primary School	VA	30	30	30	0	0	30	0	0	0	2
(6) VOLUNTARY AIDED - Places Available											
Our Lady Queen of Martyrs Primary	VA	60	60	59	0	37	0	7	6	9	n/a
St Aelreds Rc Primary School	VA	40	40	34	0	11	0	6	4	13	n/a
St Georges Rc Primary School	VA	30	30	26	0	14	0	0	5	7	n/a

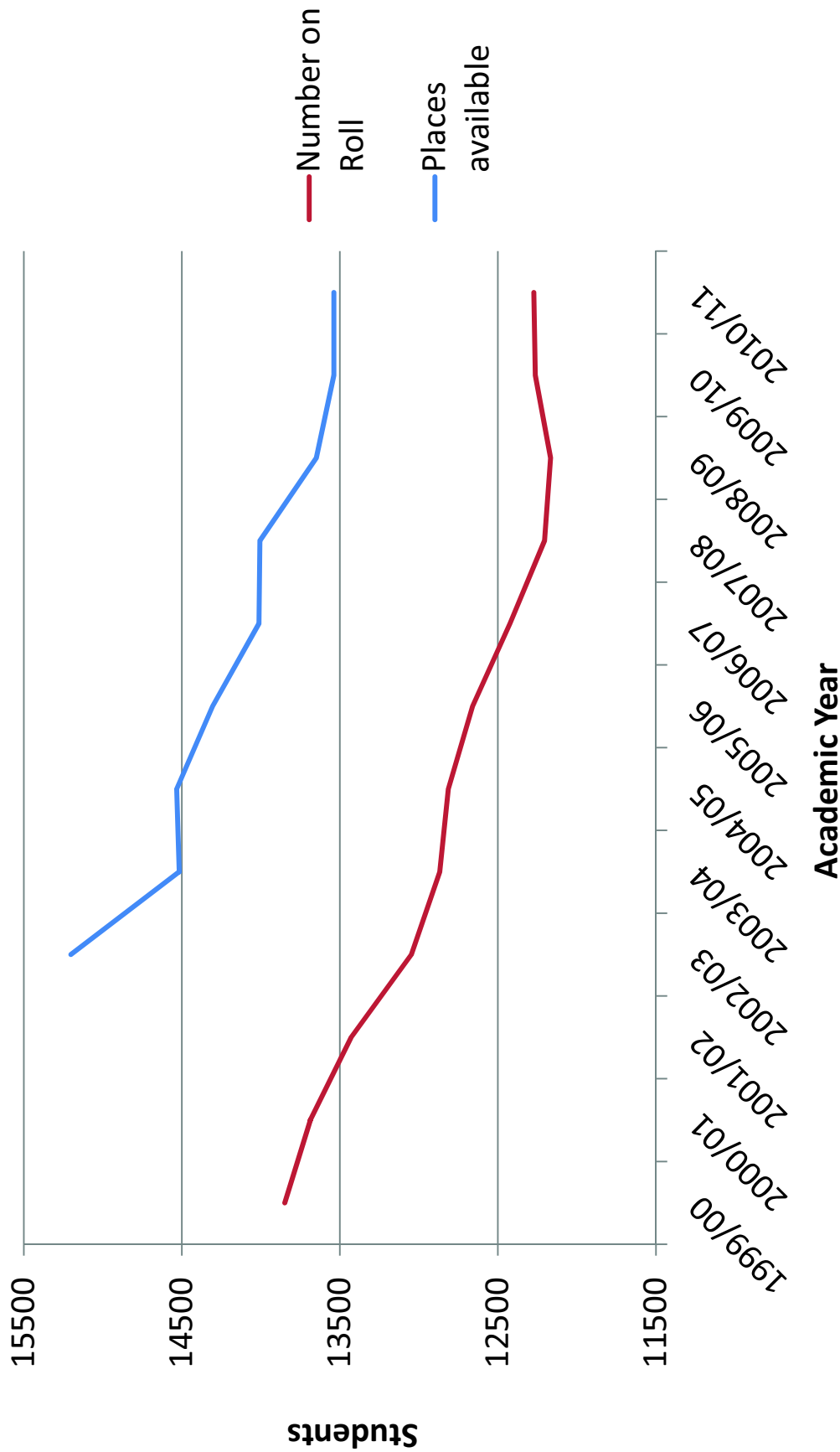
*Action taken by LA/School to temporarily increase planned admission number for 2011/2012

** Where Catchment children are on a waiting list, these applications will be late/changes to circumstances after initial allocations at 01 April 2011

Primary School Places

Supply and demand in context

Primary school places available vs Number on Roll

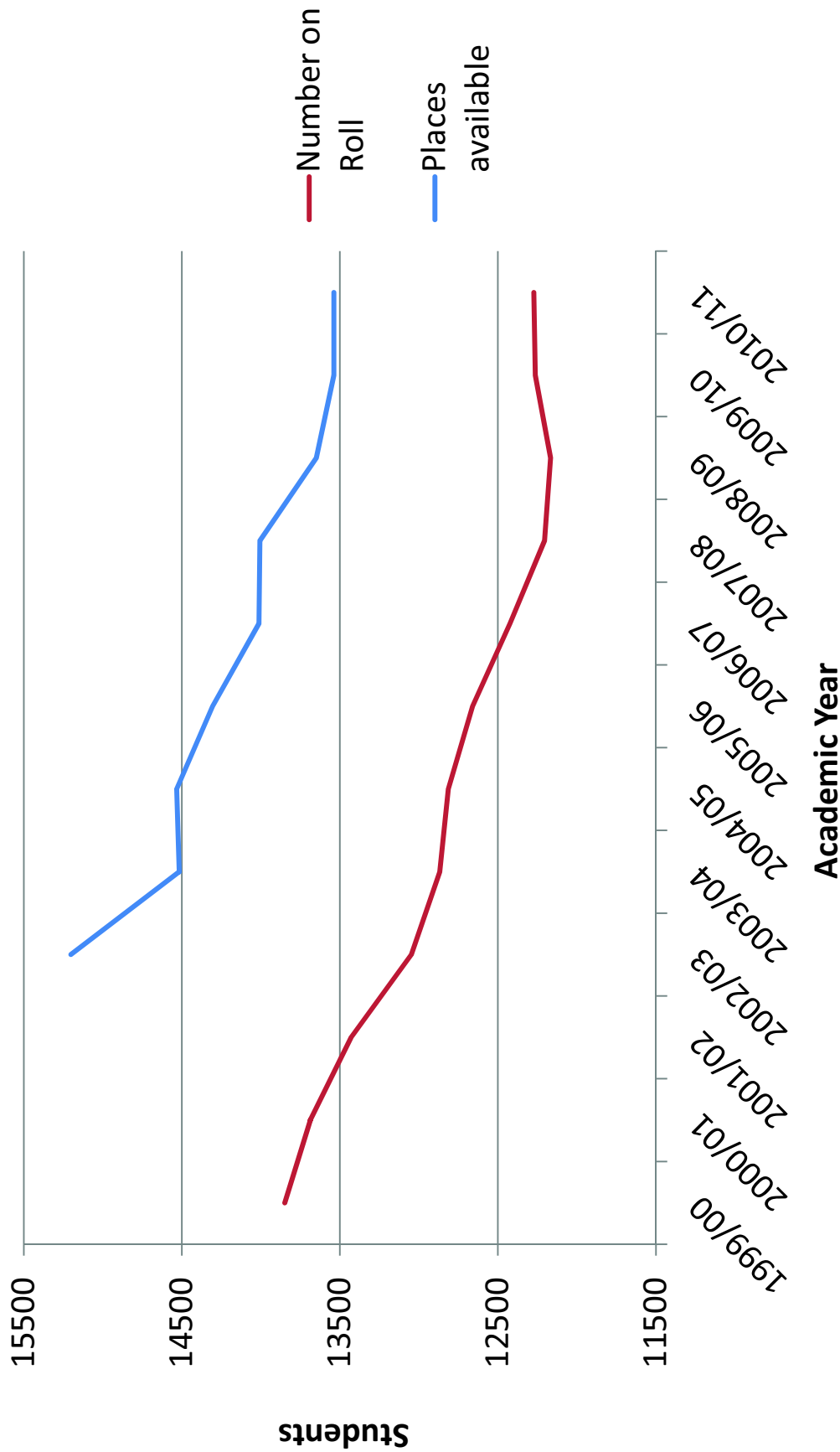


Source: Annual school census

Ways to reduce capacity

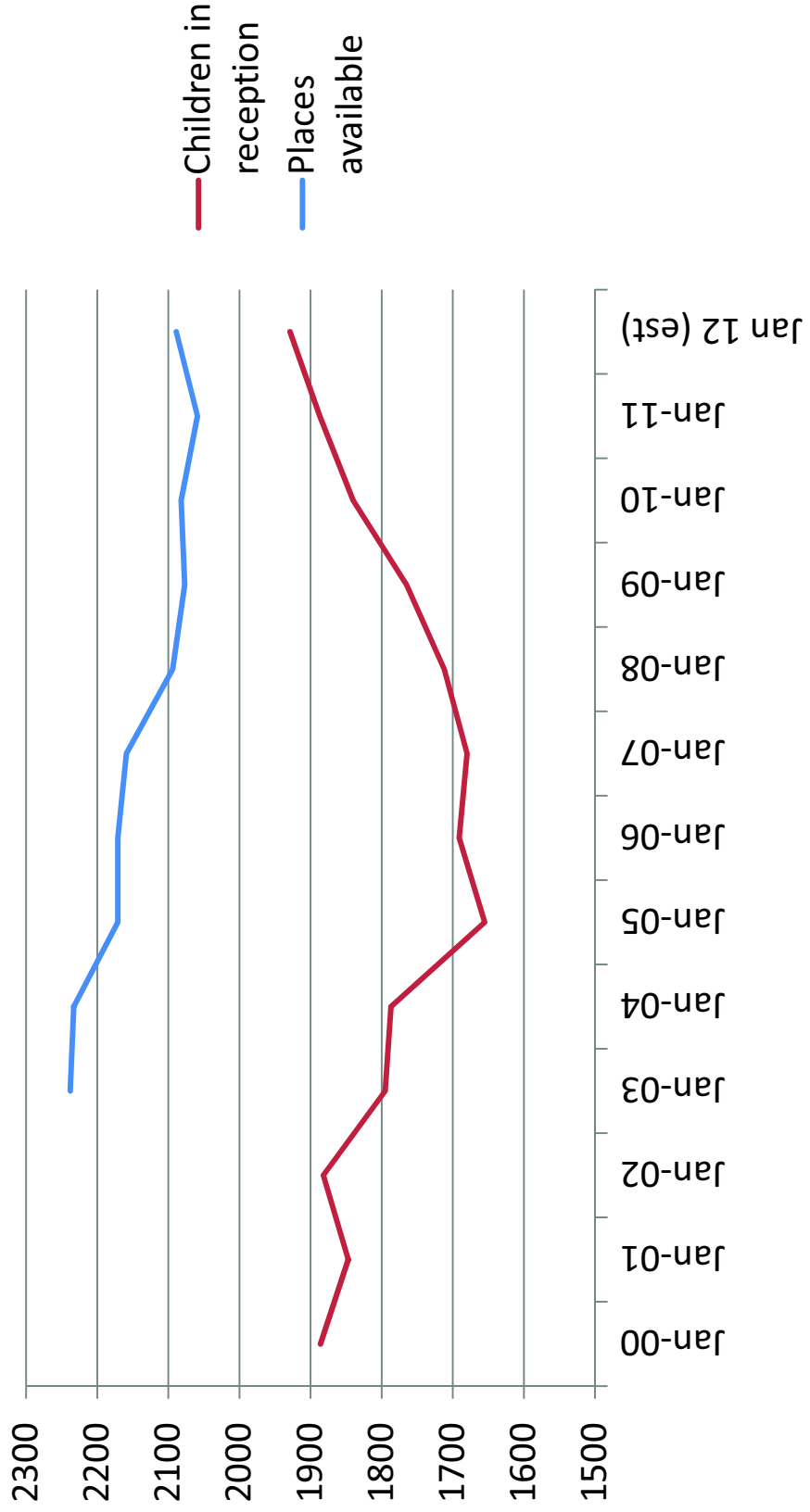
- Alternative use of classroom spaces
 - ‘Art rooms’
 - Afterschool clubs
 - Integrated Children’s Centres
- Removal of places
 - Closures
 - Amalgamations

Primary school places available vs Number on Roll

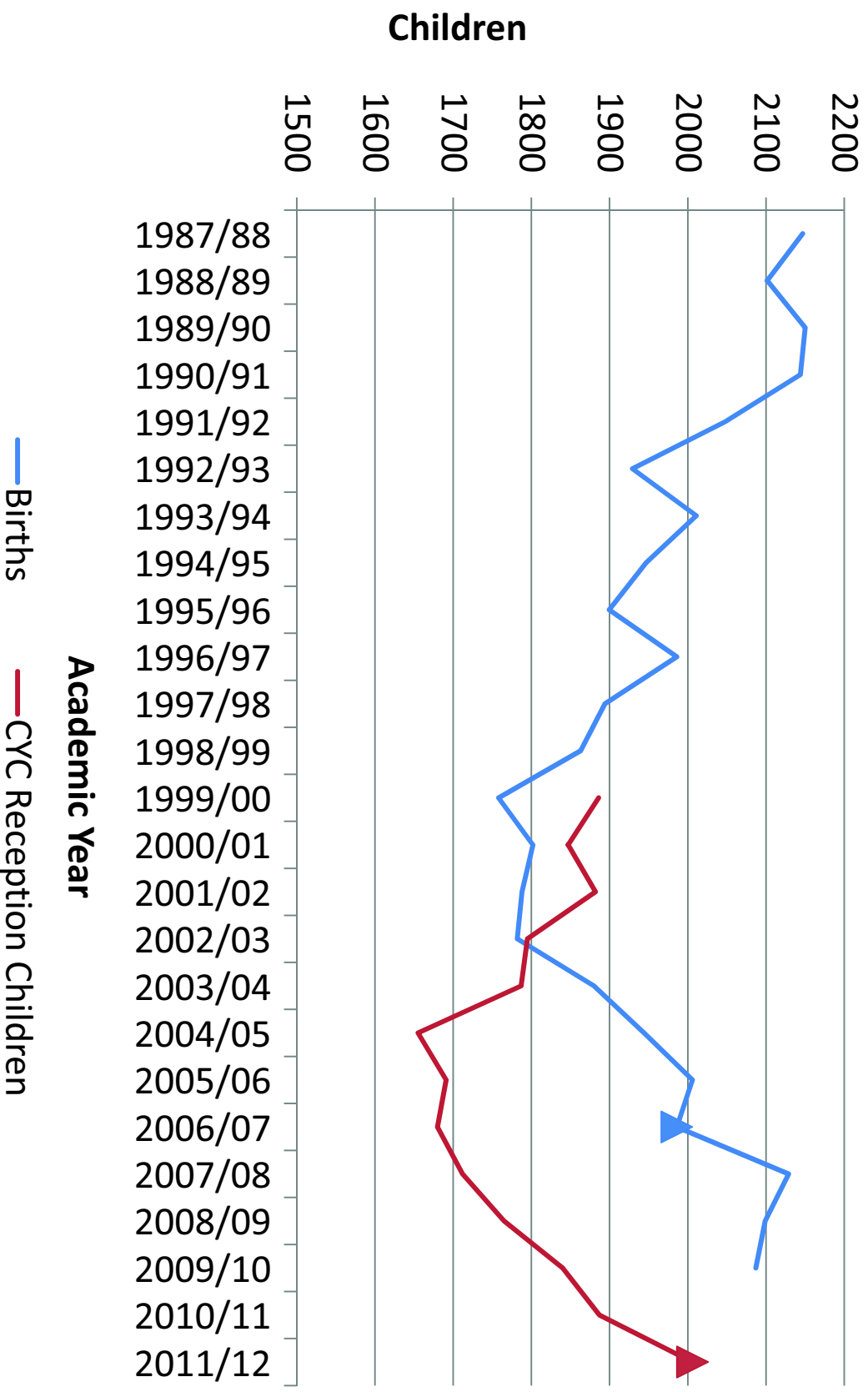


Source: Annual school census

CYC Reception children

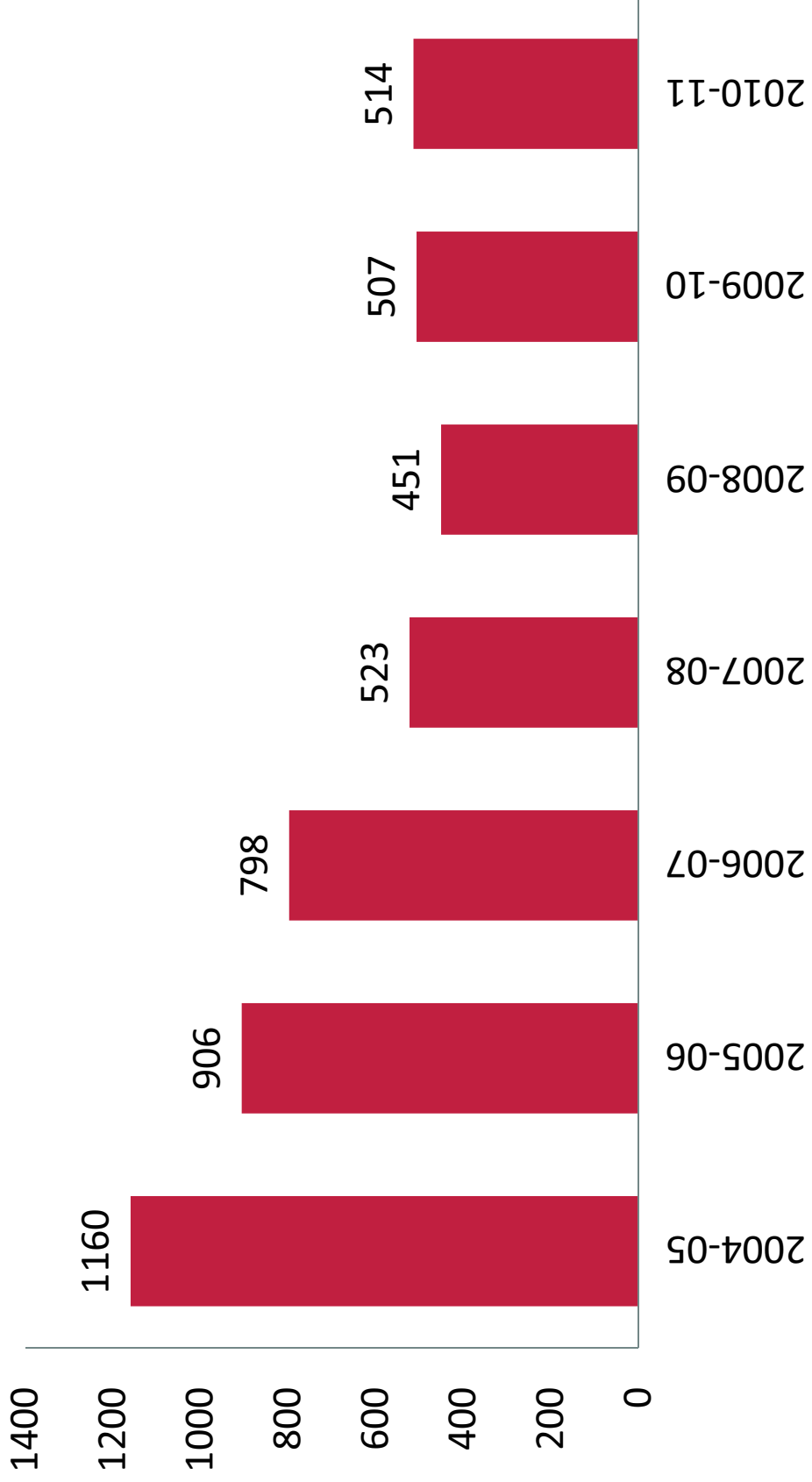


Cause 1: rising births

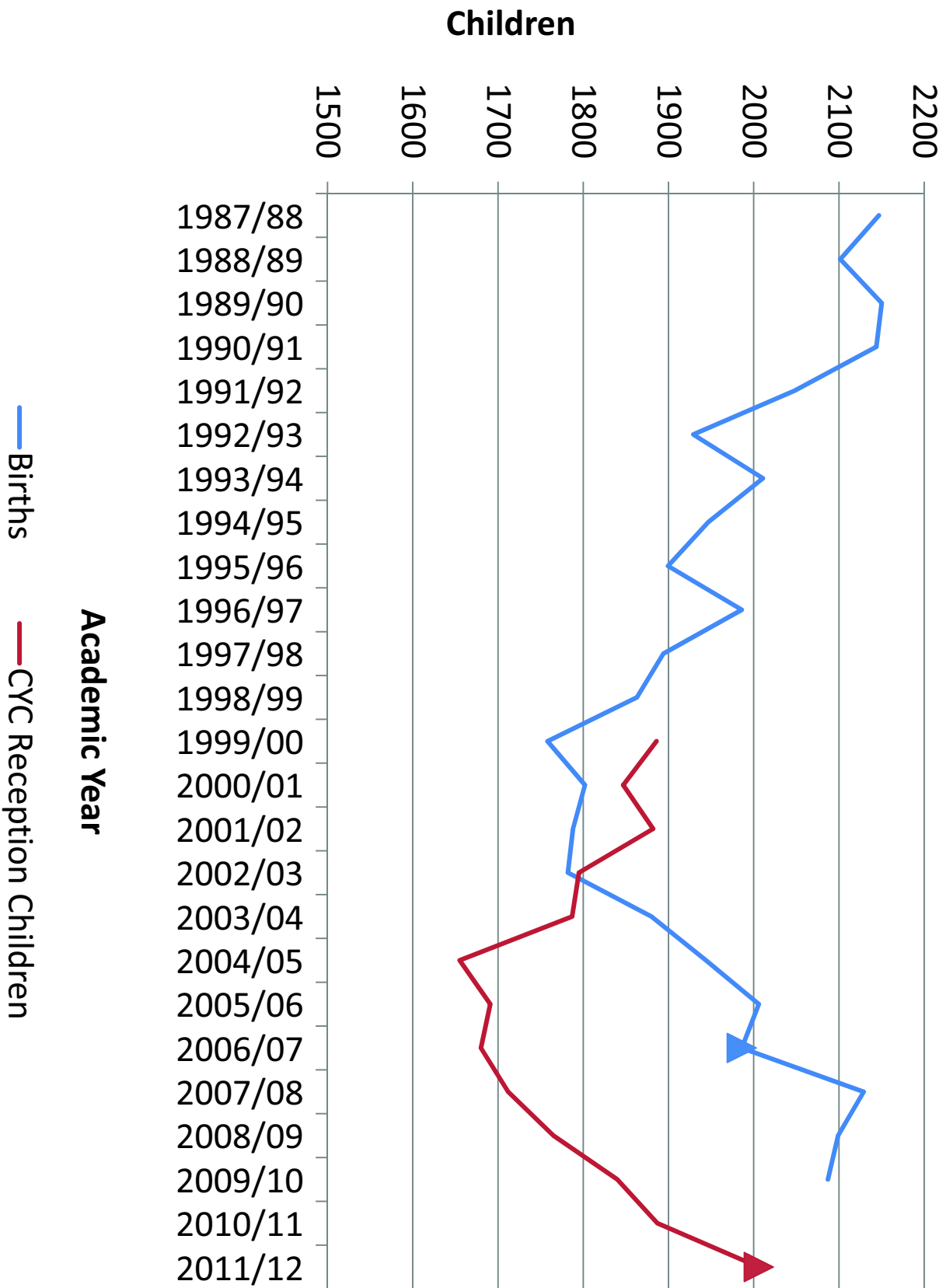


Source: ONS, annual school census

Cause 2: New housing completions

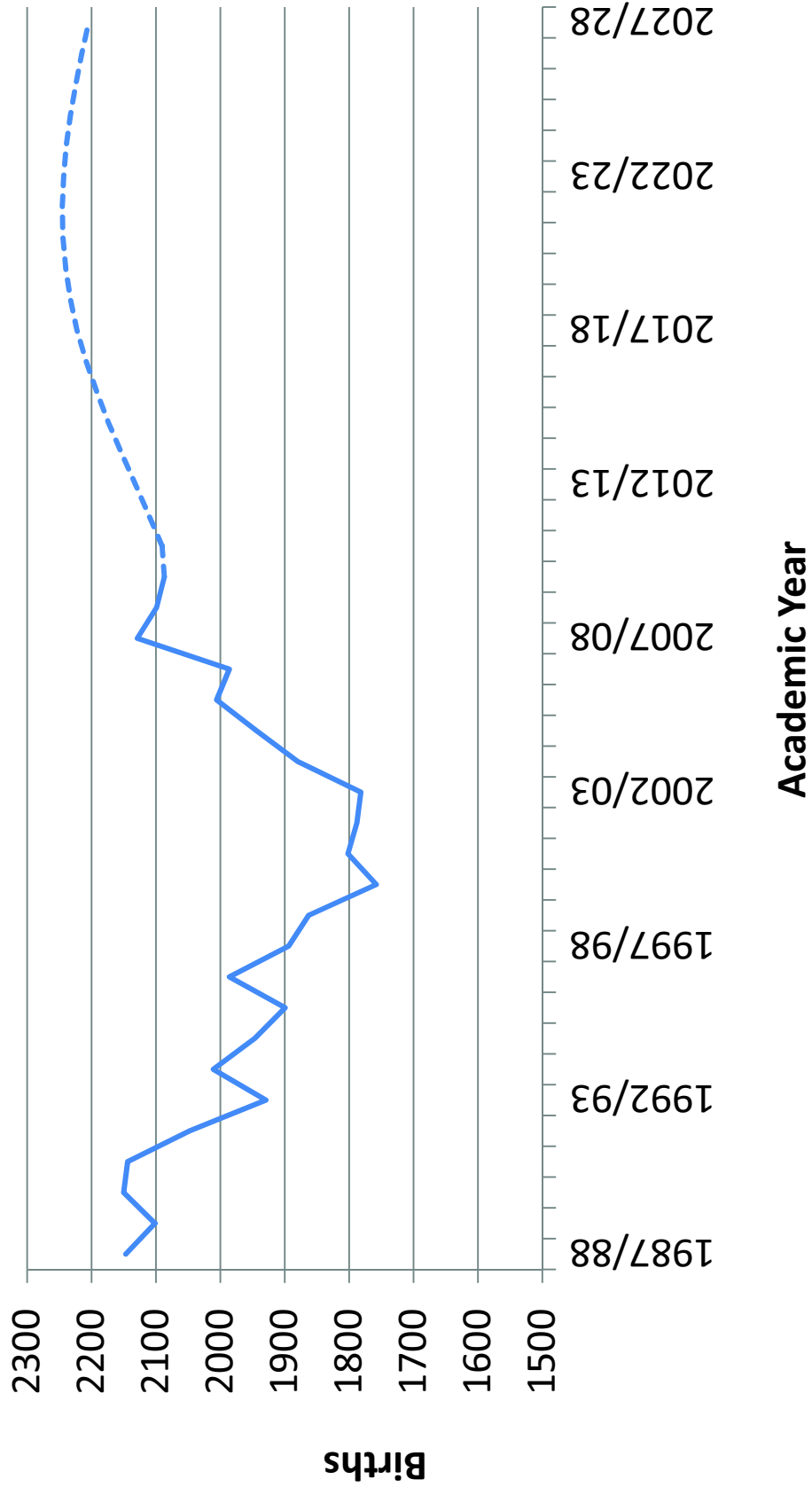


Source: City Strategy

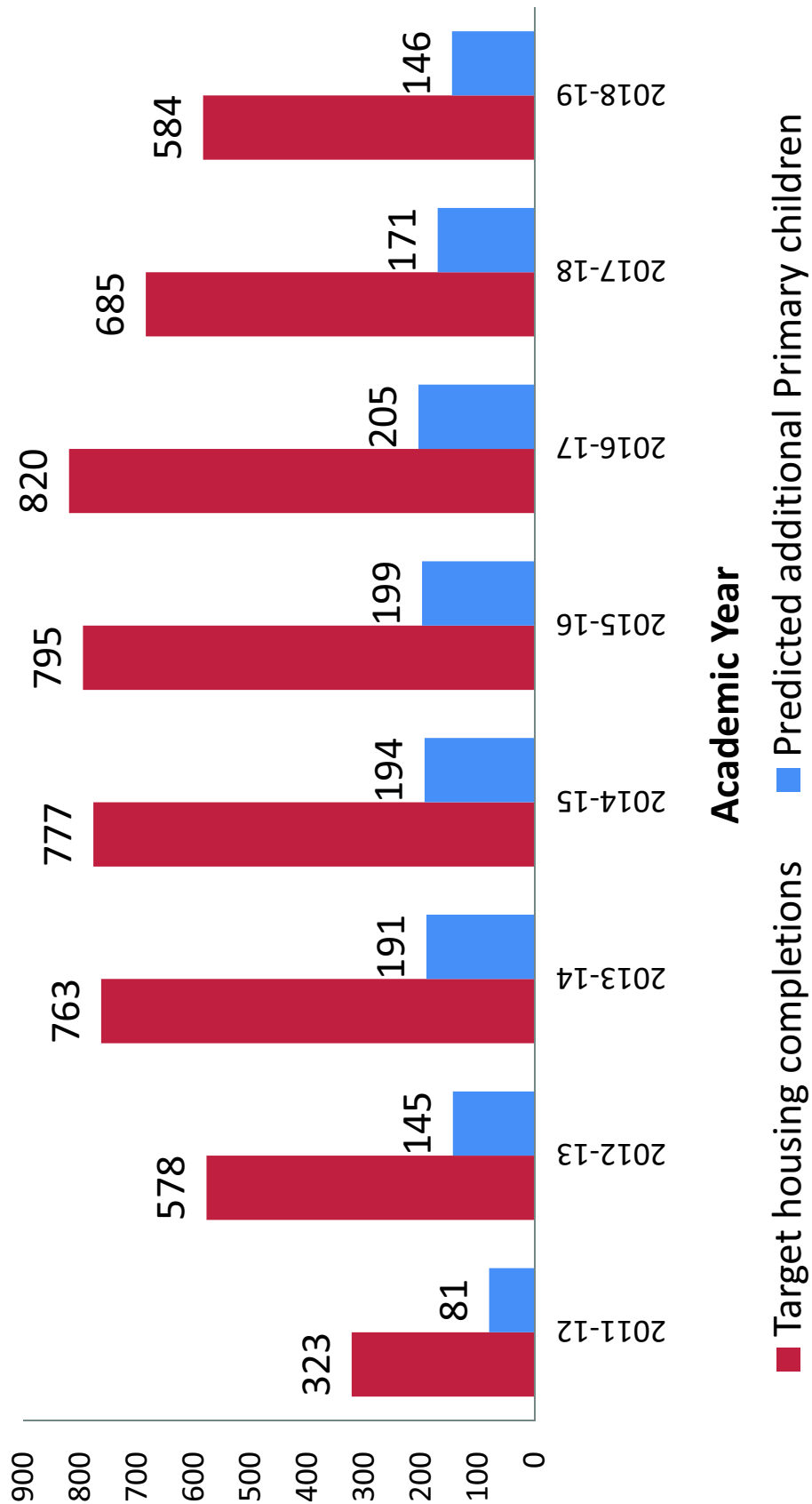


Source: ONS, annual school census

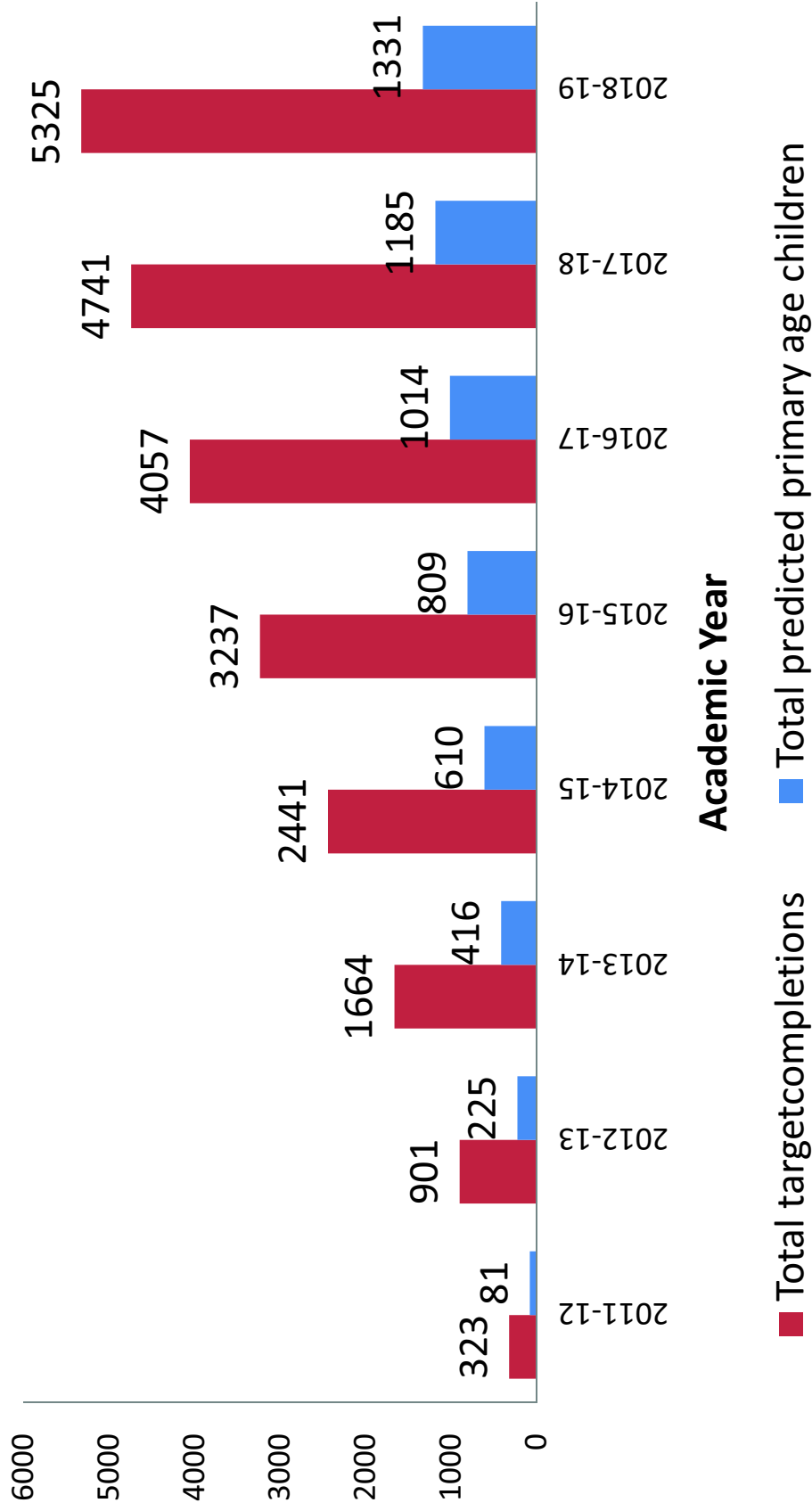
THE FUTURE: Birth rate



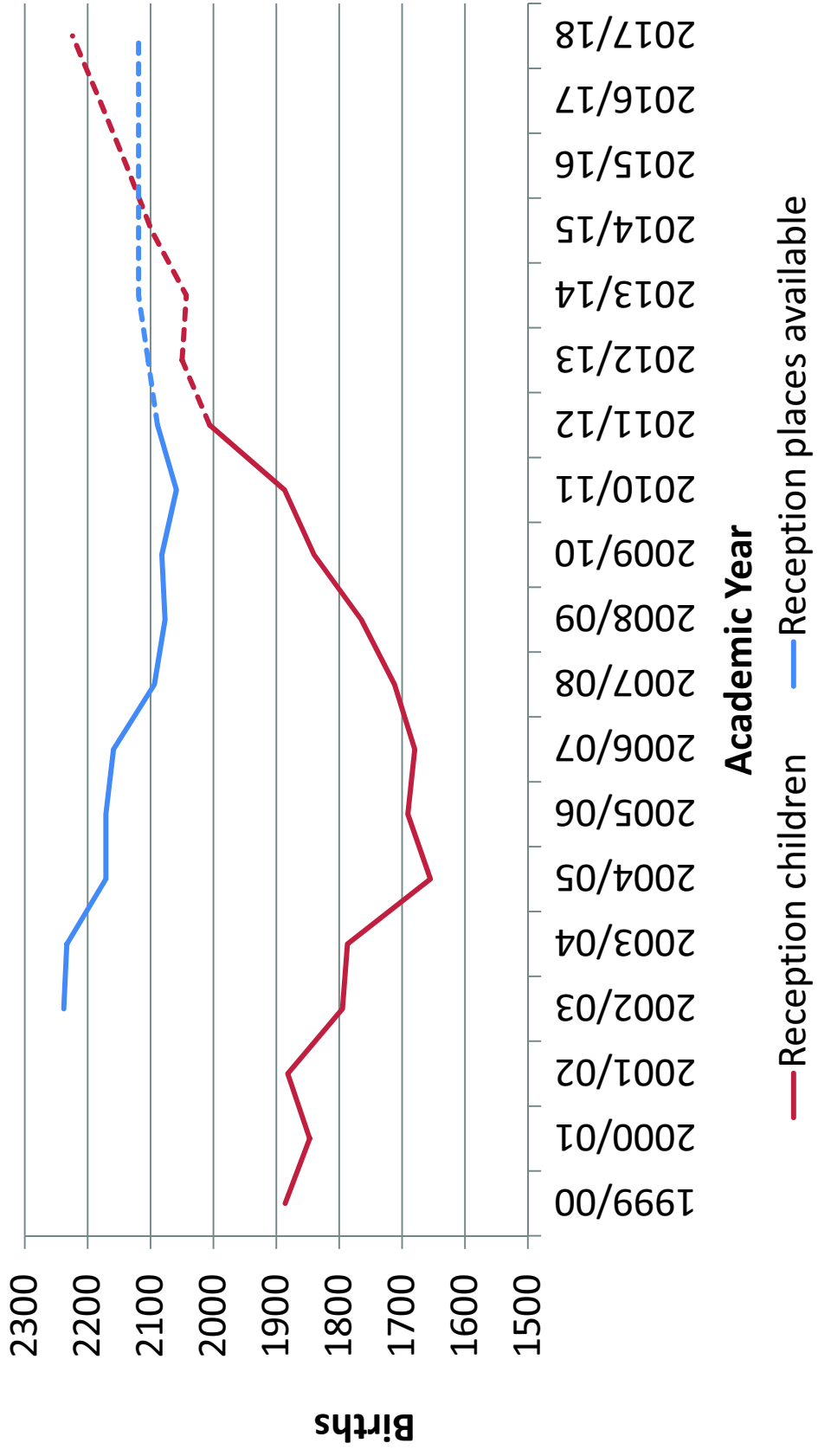
THE FUTURE: proposed new housing



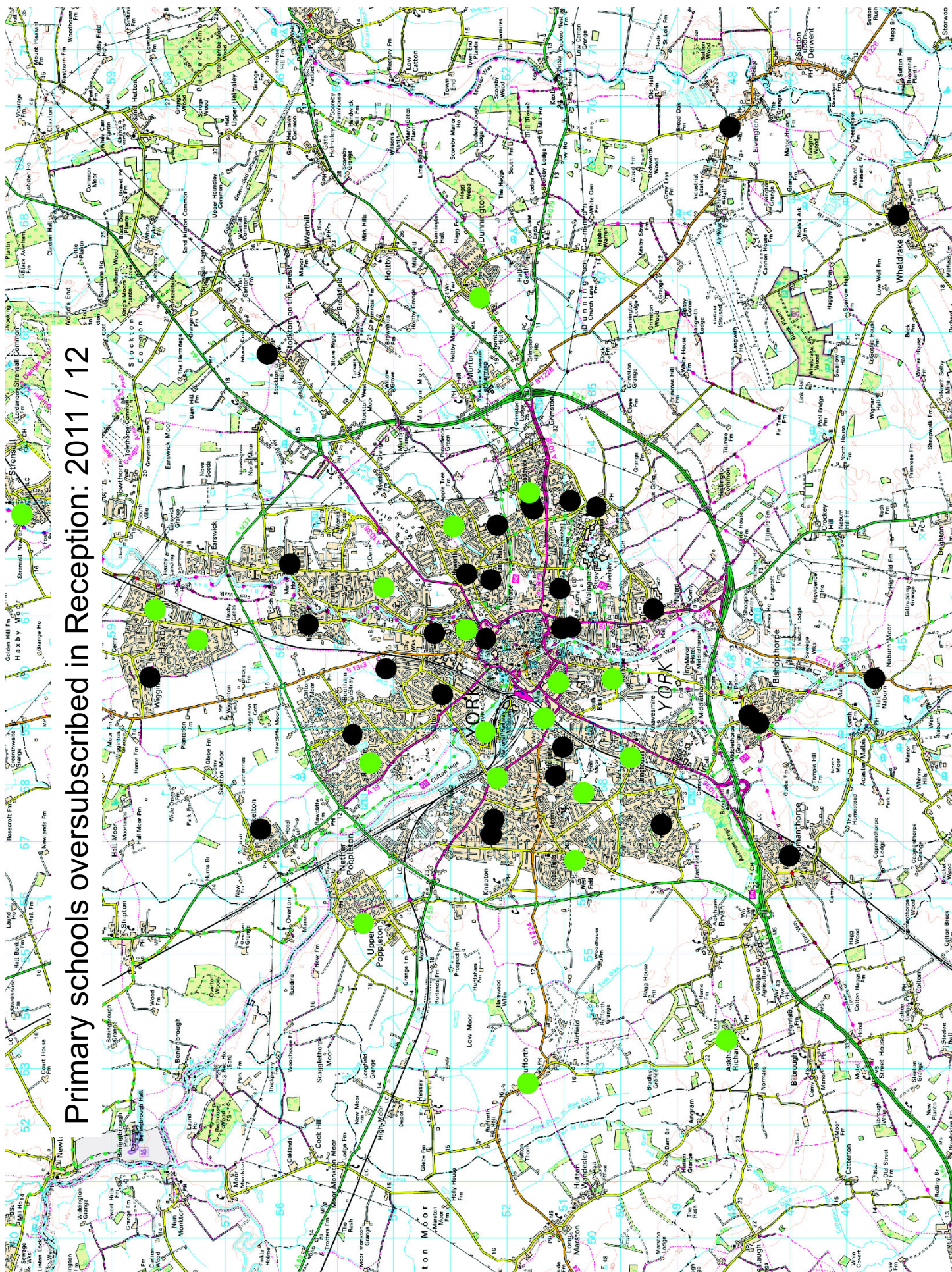
THE FUTURE: Proposed housing (cumulative impact)



THE FUTURE: Impact



Primary schools oversubscribed in Reception: 2011 / 12



Issues ...

1. Responses to new housing

- Germany Beck, Fulford (175 primary pupils)
- Derwenthorpe, Osbaldwick (135)
- British Sugar (250+)
- York Central (???)

2. Admissions oversubscription criteria

- Is it fair?
- Does the catchment system work for parents and the LA?

Issues ...

3. Implications for school travel

- Are school travel policies fair and appropriate given changing demographics?

4. New school provision

- Changing role of LA
- Academies
- Schools' partnership

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DETERMINATION

Case reference:	ADA/001712
Objector:	Two qualified parents
Admission Authority:	City of York Council
Date of decision:	24 September 2009

Determination

In accordance with section 88H(4) of the School Standards and Framework Act 1998, I do not uphold the objection lodged by two qualified parents in respect of the 2010 admission arrangements for community primary schools in the City of York.

I determine that for September 2010 the admission arrangements shall be as determined by the City Council.

The referral

1. Two qualified parents (the objectors) have referred an objection to the Adjudicator about the admission arrangements (the arrangements) made by the City of York Council (the City Council) for community primary schools for admissions in 2010, with particular regard to the relatively low priority attached to children who have siblings attending their parents' preferred school.

Jurisdiction

2. These arrangements were determined as required by the School Standards and Framework Act 1998 (the Act) and the School Admissions (Admissions Arrangements) (England) Regulations 2008 (the Regulations) by the City Council, which is the admission authority for community schools in the area. The objectors submitted their objection in accordance with section 88H of the Act and the Regulations. I am satisfied that this objection has been properly referred to me in accordance with section 88H of the Act, and that it

falls within my jurisdiction.

Procedure

3. In coming to my conclusions I have had full regard to the Act and Regulations made thereunder, the Schools Admissions Code (the Code) and all the evidence presented so far as it is relevant to the objection. I have also had regard to the relevant provisions of the Sex Discrimination Act 1975; the Race Relations Act 1976; the Disability Discrimination Act 1995; and the Human Rights Act 1998.
4. The documents I have considered in reaching my decision include:
 - The objectors' statement of objection dated 29 July 2009
 - Comments on the objection submitted by the City Council, on 20 August with supporting documents, including a statement from the school which is the focus of the objectors' concern
 - The objectors' comments of 27 August on the City Council's statement
 - Maps of the area identifying relevant school.

Background

5. The City Council first established the policies upon which its admission arrangements are based in 2002, following extensive consultation. The arrangements have subsequently been reviewed in the light of changing requirements and developing local circumstances, but the underlying policy, summarised as "local schools for local children" has been confirmed and maintained.

The Objection

6. The objector makes the following points in support of their case that the arrangements are unfair and thus not compliant with the Code.
 - a. Paragraph 2.25 of the Code states that families should be at the heart of admissions systems and that the Government expects admission authorities for primary schools to take the needs of parents with young children into account in deciding which oversubscription criteria should

be used. Further, the paragraph states that admission authorities for primary schools should ensure that their oversubscription criteria enable siblings to attend the same primary school. The City Council has failed to comply with these expectations.

- b. By giving children living in a designated catchment area higher priority in the allocation of places than siblings of children already at the school, the City Council makes unreasonable demands on the parents of young children, requiring complex and onerous arrangements for accompanying their children to their schools.
- c. This has the additional adverse effect of making it more difficult for parents to play an active part in the life of their children's schools.
- d. Several Local Authorities in the area have arrangements that give higher priority to siblings. There appears to be no reason why this should not be the case in York.

Response by the City Council

7. In response to the objection the City Council makes the following points.
 - a. The oversubscription criteria are fair and equitable, meet the requirements of the Code, and are appropriate to local circumstances, which include rural and urban areas.
 - b. The City Council's continuing commitment to the arrangements is based on annual reviews and consultation with the School Admissions Forum. A major consideration in this is the high proportion of families securing a place in their first preference schools (98% in 2007 and 95% in 2008).
 - c. The high priority attached to families living in designated catchment areas brings stability and predictability to the admissions process, and reinforces peer friendships.
 - d. Although some Local Authorities do operate arrangements that give higher priority to siblings, the City's neighbours in North Yorkshire and the North Riding of Yorkshire have adopted policies that are similar to those in the City of York.

Consideration of Factors and Conclusion

8. The City Council is correct in its view that the arrangements do not contain any feature that is specifically proscribed by the Code. But there is a duty to go beyond this to ensure that the arrangements and associated policies taken as a whole are fair (paragraph 1.72 of the Code). Insofar as the arrangements operate on a consistent basis across the City, so that every family has a priority for admission to at least one local school I consider the arrangements to be fair and equitable, and therefore compliant with the mandatory requirement of the Code set out in paragraph 1.72.
9. On the important but narrower point of the priority to be afforded to siblings, it is important to note that the relevant section of the Code does not refer to a mandatory requirement, but to feature that admission authorities should seek to include. In broad terms this means that the absence of such a feature can be acceptable if the admission authority has cogent reasons for this. The arguments put in support of the arrangements by the City Council are persuasive, although not in themselves conclusive. The Code supports the City Council's aspiration that parents be as clear as possible about their chances of securing a place in a particular school; that the arrangements should be as simple as possible; and that schools should serve their local communities.
10. In circumstances where families attach the highest importance to their children attending the same primary school, whether for the reasons given by the objectors or for other reasons, it is open to them to apply for places at their catchment area school where they can be more confident that both/all their children will be offered places.
11. I note that, although higher priority is attached to children living in a school's catchment area, sibling connections are included in the oversubscription criteria. The City Council has taken this issue into account and attached some weight to it, insofar as this is consistent with its wider policy on admissions.
12. Finally I would observe that, whilst the Code does encourage priority for siblings in primary school admission arrangements, it also prohibits the use of a sibling criterion that unfairly disadvantages other families

(paragraph 2.24). Where an over-subscribed school gives a higher priority to siblings than to children living in the catchment area, it can quickly reach the point where it is unable to accommodate all applicants living in the catchment area, thereby undermining the benefits of a catchment area and introducing a perception of unfairness.

Determination

In accordance with section 88H(4) of the School Standards and Framework Act 1998, I do not uphold the objection lodged by two qualified parents in respect of the 2010 admission arrangements for community primary schools in the City of York.

I determine that for September 2010 the admission arrangements shall be as determined by the City Council.

Dated: 24 September 2009

Signed:

Schools Adjudicator: Andrew Baxter

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COMPARISON OF OVERSUBSCRIPTION CRITERIA IN SIMILAR SIZED/NEIGHBOURING LOCAL AUTHORITIES

In Priority Order:

LA Areas	Oversubscription Criteria						Priority given to...				Appeals		% allocated their first preference 2011/12	
	Looked After	Exceptional/ Social/ Medical	Catchment and Sibling	Siblings	Catchment	Distance (all others) - Straight Line	Distance (all others) - Safe Walking	Catchment, or Sibling	Straight Line Distance, or Safe Walking Distance	% that appealed	% appealed and successful			
Bury	1			2			3		x			5.4%	1.7%	93%
C West/Chester	1	2		3	4	5			x	x		4.5%	1.6%	*
East Riding	1			3	2	4		x		x		0.6%	0.2%	97.4%
Lancashire	1	2		3		4			x			3.2%	1.3%	90%
North Yorkshire	1	2			3		4		x		x	2.0%	1.6%	95.1%
Staffordshire	1	4		3	2	5			x	x		1.3%	0.3%	92.6%
Stockport	1	2	3	5	4	6			x			2.8%	1.3%	89%
Swindon	1			2	3	4			x			1.5%	0.3%	*
Trafford	1		2	4	3	5			x	x		2.4%	0.7%	*
Warrington	1	3		2		4			x			1.6%	0.4%	88%
Warwickshire	1		2	4	3	5			x	x		2.7%	1.5%	*
York	1	3		4	2		5			x		0.9%	0.3%	92.9%

Major differences

Bury - No Catchment Areas Staffordshire - Siblings prioritised
 C West/Chester - Siblings prioritised Swindon - Siblings prioritised
 Lancashire - No Catchment Areas Warrington - No Catchment Areas

*could not supply data

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Extract from:

**2011/12 City of York Council
Home to School Transport Policy**

Home to School Transport on the
Grounds of Religion or Belief

CONTENTS

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2	Meanings	23 - 24
3	Travel arrangements	24 - 25
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5	Eligibility	27

1 Statement of Intent

The purpose of this policy is to support the attendance at qualifying schools of eligible children where the parents have expressed a preference on the grounds of religion or belief (definition: religion means any religion and belief means any religious or philosophical belief. References to religion or belief include references to lack of religion or belief.)

2 Meanings

2.1 Qualifying schools are:

- (i) community, foundation or voluntary schools;
- (ii) community or foundation special schools;
- (iii) non-maintained special schools;
- (iv) short stay schools previously known as pupil referral units;

A qualifying school also includes places other than a school at which a pupil might receive education under section 19(1) of the Education Act 1996.

2.2 Eligible children:

- (a)
 - (i) children who are entitled to free school meals or whose parents are in receipt of their maximum level of Working Tax Credit; and
 - (ii) are aged 11 to 16; who have been allocated a place at a nearest suitable school preferred on the grounds of religion or belief where their ordinary place of residence is more than 2 miles, but not more than 15 miles from that school;
- (b)
 - (i) children who are entitled to free school meals; and
 - (ii) are aged 5 to 11; and are attending their nearest suitable school preferred on the grounds of religion or belief where their ordinary place of residence is more than 2 miles from that school.
- (c) Children not entitled to free school meals and whose parents are not on the maximum level of Working Tax Credit but are attending their

nearest suitable school preferred on the grounds of religion or belief where their ordinary place of residence is:

- i. over 2 miles but not more than 15 miles for primary school pupils; or
- ii. over 3 miles but not more than 15 miles for secondary school pupils;

from that school.

2.3 Ordinary place of residence

- (a) The child's place of residence will be deemed to be the residence at which the child resides the majority of the time (51% or more) during the normal school week at the closing date for receiving applications for admission to school during the normal admission round.
- (b) Where a child subsequently moves address, the eligibility for free home to school transport will be re-determined.

2.4 Distance

Distance is measured by:

- (a) for children set out in paragraph 2.2 (a) and (b) on roads suitable for a motor vehicle;
- (b) for children set out in paragraph 2.2 (c) suitable walking route.

3 Travel arrangements

- 3.1 Travel arrangements are those provisions made by the Local Authority for children to receive free home to school transport.
- 3.2 The duty to provide free home to school transport will be for the journey at the:
 - (a) start of the school day; and
 - (b) end of the school day.
- 3.3 The school day is deemed to be the session times as approved by the governing body of the qualifying school.
- 3.4 Nothing in the travel arrangements made for any child shall be for any travel between education institutions during the school day. Where a child moves from one establishment to another, in order to receive education, that cost will fall to the school to pay.
- 3.5 For arrangements to be free of charge, every feature of the arrangements will be free, except the provision of photographs, which cost shall fall to the parent to pay.

- 3.6 Travel arrangements will be:
- (a) normally a travel pass unless not suitable for the child's needs; or
 - (b) refunded travelling expenses according to the cheapest available public transport route; or
 - (c) mileage expenses in accordance with the Council's current rate for pupils requiring special arrangements; or
 - (d) the provision of a cycling allowance.
 - (e) a place on a vehicle contracted by the authority to provide home to school transport;
 - (f) employ a walking escort or chaperone.

4 Provision of free travel

- 4.1 Free home to school travel will be provided for eligible children where it can be demonstrated that attendance at a qualifying school is on the grounds of religion or belief.
- 4.2 Evidence to support the following will be provided by the parent:
- (i) where the preference to attend a school is based on the parent's religion or belief;
 - (ii) where the parent does not wish the child to attend a school which is any of three schools nearest their home and within 2 miles based on the parent's religion or belief.

5 Eligibility

- 5.1 In each subsequent year the child's eligibility will be re-assessed on 1 July.

Home to Denominational School Transport Policies for other Local Authority Areas

Council	Current/Previous Policy	New/Future Policy	With effect from	Phased gradually
Bury Council	Free Transport for those attending nearest Denominational school	N/A	N/A	N/A
Cheshire West and Chester Council	Subsidised transport to Denominational school – parent pays £299 up to 2 children max	Withdraw Subsidised travel	Sept 2012	No
Lancashire County Council	Free Transport for those attending nearest Denominational school	Contributory charge of £380 per child to attend Denominational school	Sept 2011	No
Staffordshire County Council	Free Transport for those attending nearest Denominational school	Withdrew free Transport to Denominational schools	Sept 2011	Yes – remain entitled until end of school phase
Stockport Metropolitan Borough Council	Free Transport for those attending nearest Denominational school	N/A	N/A	N/A
Swindon Borough Council	Free Transport for those attending nearest Denominational school	N/A	N/A	N/A
Trafford Council	Free Transport for those attending nearest Denominational school	Withdraw free Transport to Denominational	Sept 2012	No

Warrington Borough Council	Free Transport for those attending nearest Denominational school	N/A	N/A	N/A
Warwickshire County Council	Free Transport for those attending nearest Denominational school	N/A	N/A	N/A
North Yorkshire County Council	Free Transport for those attending nearest Denominational school	Withdraw free transport to Denominational	Sept 2012	Existing pupils will continue to receive free transport until the end of their school phase.
East Riding Council	No free transport for denominational schools since 2005	N/A	N/A	N/A

Demographics Scrutiny Review - Denominational / SEN Transport Analysis

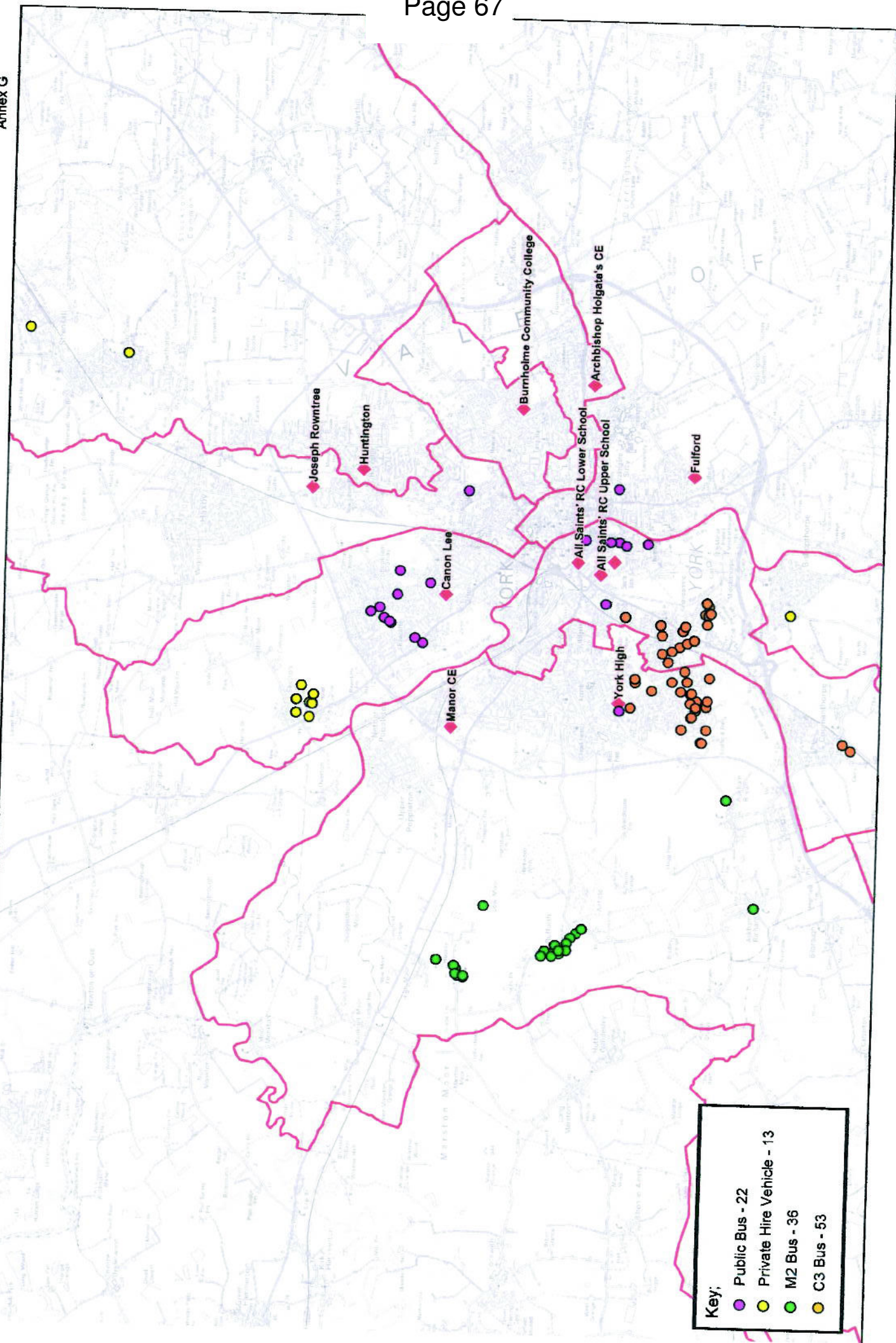
Secondary Schools	Provision	Number of pupils by current NC Year											
		Year 7				Year 8				Year 9			
		Pupils	Cost	of which...		Pupils	Cost	of which...		Pupils	Cost	of which...	
				FSM	SEN			FSM	SEN			FSM	SEN
All Saints RC	Bus - Public Service	16	3888	0	0	15	3645	0	0	16	3888	0	0
	Private Hire Denom	0	0	0	0	2	5065	0	0	1	2533	0	0
	Private Hire SEN	1	1520	0	1	0	0	0	0	1	2964	1	1
	Total	17	5408	0	1	17	8710	0	0	18	9385	1	1
Archbishop Holgate's CE	Bus - Public Service	4	972	0	0	1	243	0	0	0	0	0	0
	Private Hire Denom	0	0	0	0	0	0	0	0	0	0	0	0
	Private Hire SEN	1	2153	0	1	0	0	0	0	4	20011	0	0
	Total	5	3125	0	1	1	243	0	0	4	20011	0	0
Manor CE	Bus - C3	13	4348	0	0	7	2341	0	0	15	5017	1	0
	Bus - M2	10	3135	1	0	3	940	0	0	7	2194	0	0
	Bus - Public Service	2	486	1	0	2	486	0	0	3	729	0	0
	Private Hire Denom	0	0	0	0	5	7125	0	0	0	0	0	0
	Private Hire SEN	1	2897	0	1	1	3420	0	1	2	7473	0	0
	Total	26	10866	2	1	18	14312	0	1	27	15413	1	0
	Total SEN Costs	3	6570	0	3	1	3420	0	1	7	30448	1	1
	Total Denom Costs	45	12829	2	0	35	19845	0	0	42	14361	1	0

Secondary Schools	Provision	Number of pupils by current NC Year											
		Year 10				Year 11				Total For All Years			
		Pupils	Cost	of which...		Pupils	Cost	of which...		Pupils	Cost	of which...	
				FSM	SEN			FSM	SEN			FSM	SEN
All Saints RC	Bus - Public Service	15	3645	0	0	16	3888	1	0	78	18954	1	0
	Private Hire Denom	1	2533	0	0	4	10131	0	0	8	20262	0	0
	Private Hire SEN	1	2964	0	0	0	0	0	0	3	7448	1	2
	Total	17	9142	0	0	20	14019	1	0	89	46664	2	2
Archbishop Holgate's CE	Bus - Public Service	0	0	0	0	3	729	0	0	8	1944	0	0
	Private Hire Denom	2	12236	0	0	2	7372	0	0	4	19608	0	0
	Private Hire SEN	0	0	0	0	2	4053	0	2	7	26217	0	3
	Total	2	12236	0	0	7	12154	0	2	19	47769	0	3
Manor CE	Bus - C3	11	3679	0	0	7	2341	0	0	53	17726	1	0
	Bus - M2	11	3448	0	0	7	2194	1	0	38	11911	2	0
	Bus - Public Service	3	729	0	0	1	243	0	0	11	2673	1	0
	Private Hire Denom	4	7647	0	0	3	5272	0	0	12	20044	0	0
	Private Hire SEN	3	10480	0	3	1	2375	0	1	8	26645	0	6
	Total	32	25983	0	3	19	12425	1	1	122	78999	4	6
	Total SEN Costs	4	13444	0	3	3	6428	0	3	18	60310	1	11
	Total Denom Costs	47	33917	0	0	43	32170	2	0	212	113122	5	0

Primary Schools	Provision	Reception		Year 1		Year 2		Year 3		Year 4		Year 5		Year 6		Total	
		Pupils	Cost	Pupils	Cost	Pupils	Cost	Pupils	Cost	Pupils	Cost	Pupils	Cost	Pupils	Cost	Pupils	Cost
St Wilfrid's RC	Denominational	8	5639	3	2115	8	5639	11	7753	12	8458	7	4934	8	5639	57	40177
	Private Hire SEN	0	0	1	3800	0	0	0	0	0	0	0	0	0	0	1	3800

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Location of Pupils Currently Receiving Transport to Attend Manor CE School

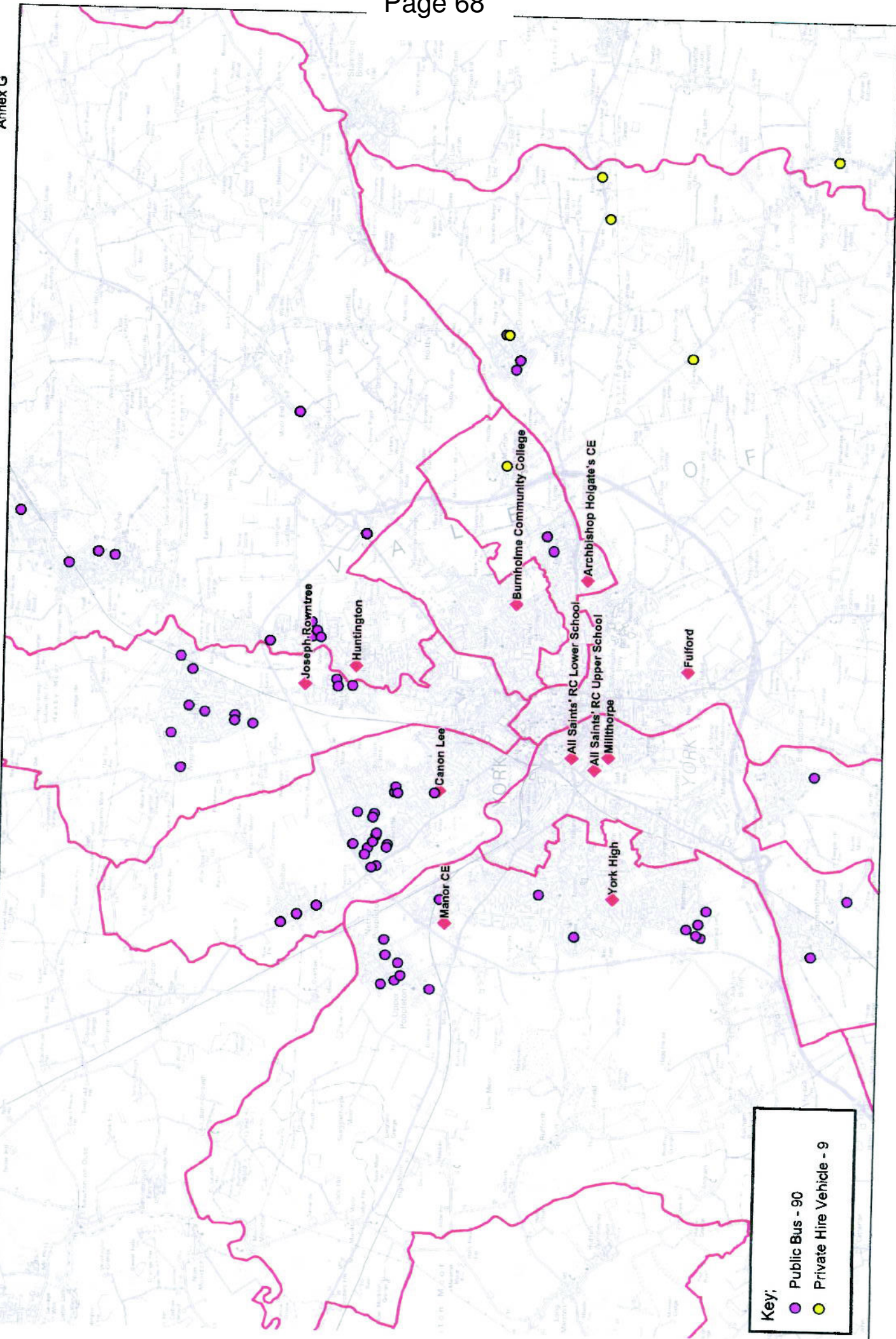


Key:

- Public Bus - 22
- Private Hire Vehicle - 13
- M2 Bus - 36
- C3 Bus - 53

Location of Pupils Currently Receiving Transport to Attend All Saint's RC Secondary School

Annex G

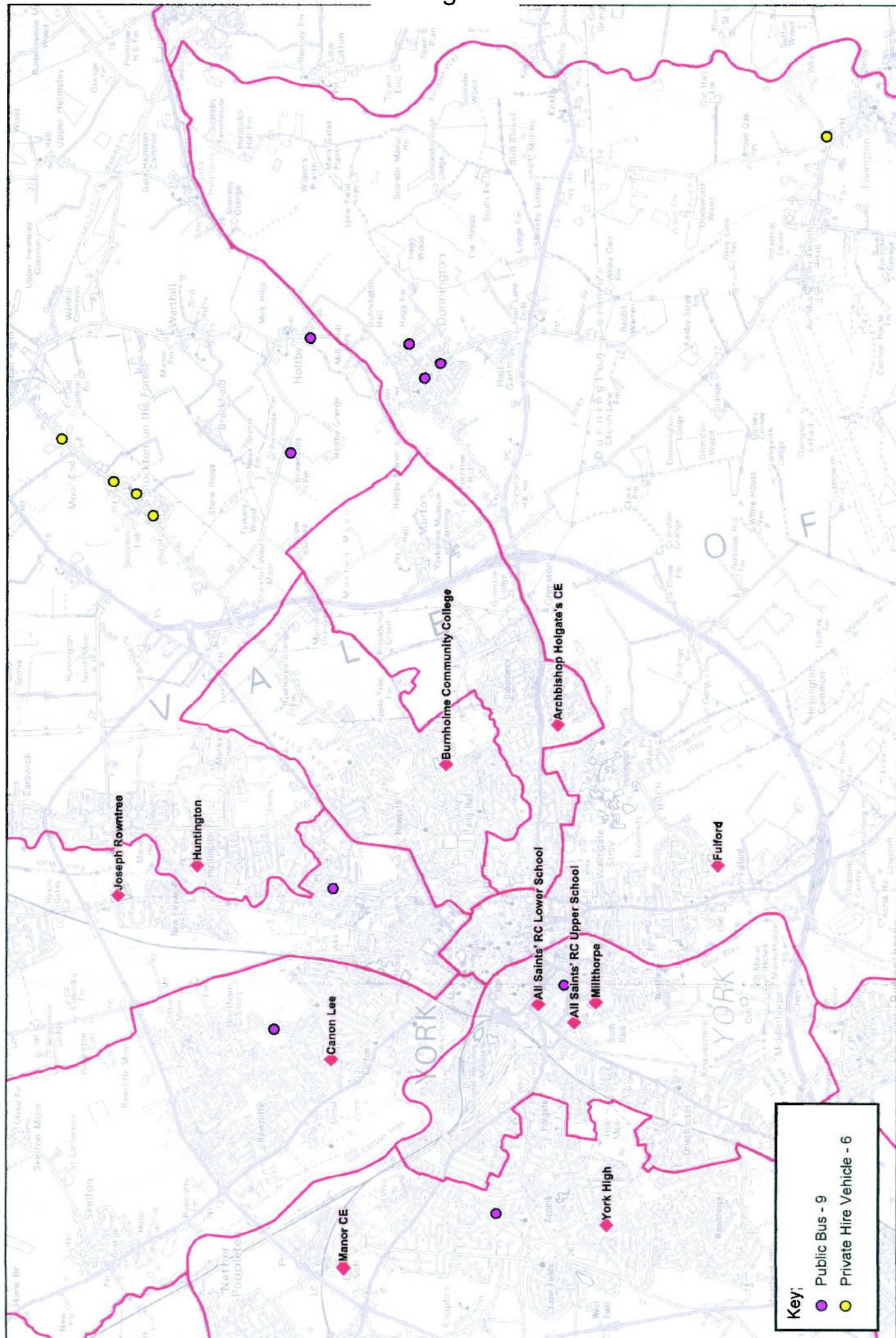


Key:

- Public Bus - 90
- Private Hire Vehicle - 9

Location of Pupils Currently Receiving Transport to Attend Archbishop Holgate's CE Secondary School

Annex G



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Learning & Culture Overview & Scrutiny Committee

7 December 2011

Report of the Assistant Director – Governance and ICT

Scrutiny Topic Assessment – York Museums Trust**Purpose of Report**

1. This report presents the York Museum Trust scrutiny topic proposed by Councillor Watson together with background information on the formation of the Trust and its performance. To inform the decision on whether or not to proceed with the review, the report recommends the completion of the topic assessment form attached at Annex A.

Background to York Museums Trust

2. In 2002 City of York Council (CYC) entered into a partnership agreement with the newly constituted York Museums Trust (YMT) in order to ensure the long-term stability and prosperity of the City's museums and collections. The background to the decision to create YMT (a company limited by guarantee with charitable status) was:
 - The increasing decline in visitor numbers – an average of 37,000 visits per year lost over the previous ten years
 - The increasing gap between income and expenditure with the service costing an extra £120k every year
 - A large backlog of inadequately catalogued objects and poor storage conditions
 - Buildings requiring extensive maintenance and upgrading, including the need to make them accessible
 - A need to modernise the display methods at all sites
 - A need to improve the effectiveness of the management of the service
3. The Council's decision to place the museums in the hands of an independent entity was made explicitly to achieve business

turnaround, and in this respect the arrangement has been very successful.

4. In December 2007, YMT and CYC entered into a Partnership Delivery Plan (PDP) plan covering year's five to ten of the Trust (2008–13) – see Annex B. This set out the respective objectives of CYC and YMT and where they overlap, and the key outcomes that YMT is accountable for delivering, as follows:
 - a) Stabilising visitor figures
 - b) Delivering new income streams
 - c) Creating new exhibitions and interpretative services
 - d) Creating an education strategy
 - e) Increasing use and involvement by residents
 - f) Achieving high visitor satisfaction
 - g) Cataloguing of the collection
5. The way the trust functions is governed by its status as a charity. As such, YMT is regulated by the Charity Commission. Charities must be able to demonstrate that the activities they carry out in pursuance of their charitable purposes are for the benefit of the public. A charity must not provide disproportionate levels of private benefit to any particular group or person. The Charity Commission has given guidance on assessing the public benefit of charities and trustees must have regard to that guidance.
6. For a body to be a Charity it must be independent. It cannot exist as a body for promoting the policies of the Council and cannot act under its direction. The relationship between CYC and YMT is also regulated by a range of legal agreements entered into at the time of the transfer. These include the transfer agreement, leases of the various buildings, and the collections management agreement.
7. The Council makes an annual grant to YMT. It has received stable funding since 2002 with inflation uplifts. In 2010/11 the grant was £1,506,710. The current financial arrangements have been agreed to 2013.
8. YMT report back in great detail twice a year to this Overview & Scrutiny Committee in the person of the Chief Executive. In terms of the museums activities, this level of detailed reporting to members is unprecedented. Because of this members have far more detail about the decisions, plans, and activities of the service than ever before, and far more information than they received when the Council managed the museums itself.

Background to the Proposed Review

9. In September 2011 this Committee received YMT's 2010/11 year end performance report with particular emphasis on the second half of the year. The report detailed YMT's achievements against the key targets highlighted in paragraph 4 above, as follows:
- *Stabilising visitor figures:* Visitor numbers have risen from 387,000 in the first full year of operation to 641,000 in 2010/11 (which included a period of 4 months when the Yorkshire Museum was shut for refurbishment).
 - *Delivering new income streams:* YMT has increased the diversity of their income streams and their overall income. In 2002 the Council's grant accounted for over 50% of YMT's income; in 2011 it has reduced to less than 30% of income with admission charges, *Renaissance in the Region* funding, and other trading income making up the remainder.
 - *Developing new exhibitions and interpretive service:* There is now an excellent programme of activities at all the sites managed by the Trust. Partnerships with the Arts Council: England, The Tate and the British Museum have not only brought the best of national collections to York but have also shown York's collections regionally and nationally. The Trust's learning support team have won awards and plaudits for their interpretation and informal learning programme. The Trust contributes to wider city initiatives including Illuminating York and the Viking Festival and in 2012 it is one of the partners delivering the York Mystery Plays.
 - *Upgrade the building assets:* YMT has so far raised approximately £7m which it has invested in the Council's buildings, gardens, and collections.
 - *Increase use and involvement by residents:* Visits by York residents, free of charge, reached 112,000 last year. Of this figure 6,000 were from York school children from over 50 state and independent sector schools. A volunteer programme introduced in 2009 has over 200 active volunteers and working with the H.E. sector the trust hosts over 20 student placements annually. They have an active inclusivity programme supported by the Joseph Rowntree Foundation, Arts Council: England and renaissance in the regions.

- *Achieve high visitor satisfaction:* The Trust has successfully retained the Visitor Quality Assurance standard and their own visitor survey show that visitor satisfaction is consistently above 96% with an average 98% of visitors willing to recommend the visit to others.
 - *Ensure the cataloguing of the collections:* The agreed programme of retrospective documentation is on target. The Trust team has also developed an acquisitions programme to reflect the history, science and culture of the city and region.
10. In regard to the collections, which are of national and international importance, Cllr Watson (topic registree) has queried the progress being made in cataloguing them, in light of the reduced number of curators which remain in post following redundancies at the Museums. As part of his proposed review, Cllr Watson wants to seek reassurance that the appropriate qualified curatorial staff have been retained to preserve, protect, interpret and maintain public access to the Council's collections.
11. Cllr Watson will be in attendance at the meeting and would welcome the opportunity to discuss all of his concerns, and to register his support of this topic proceeding to full scrutiny review.

Options

12. Having considered all of the information contained within this report and its annexes, and to assist in deciding whether or not to proceed with the review, Members are asked to complete the Assessment Form at Annex A.
13. If Members decide to proceed with the review, Members may choose to:
- carry out the review as a full committee or create a Task Group of Committee members to complete the review on their behalf
 - identify a suitable remit for the review by agreeing a suitable aim and a number of objectives
 - Agree an appropriate time to start the review bearing in mind their ongoing work and the other review work currently programmed for this municipal year.

14. Alternatively, Members may decide that in order to make an informed decision on whether or not to proceed with the review, further information is required in relation to the concerns raised by Cllr Watson. Therefore the Committee may choose to request that a further report be brought to their next meeting.
15. The last option available to Members having considered all the information presented at this meeting, is not to proceed with the review.

Council Plan

16. The success of YMT's business plan contributes to the council's priority to create jobs and grow the economy, through its investment in the tourism infrastructure. It also provides opportunities for learning, for young people across the city.

Risk Management

17. It may be advisable to investigate further the concerns of Cllr Watson identified in this report or at the meeting before deciding whether or not to proceed with the review. For example, if a decision is taken not to proceed with this review, and the concerns of Cllr Watson about the collections (as outlined in paragraph 10 above) prove to be correct, there is a risk to the council that the cataloguing of those collections may not be completed in line with the Partnership Delivery Plan.

Recommendations

18. Having considered the information provided within this report, the Learning & Culture Overview & Scrutiny Committee are recommended to:
 - a) Complete the Assessment form at Annex A;
 - b) Agree whether they have all the necessary information to make an informed decision on whether or not to proceed with the review
19. If a decision is taken to go ahead with the review, Members are recommended to:
 - i. Create a Task Group to carry out the review on their behalf, to enable the full committee to continue with the scrutiny reviews already identified for this municipal year

- ii. Agree a review remit with a number of objectives
- iii. Programme the review into the committee's workplan and identify a timeframe for the review's completion.

Reason: To ensure compliance with scrutiny procedures, protocols and workplans.

Contact Details

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Andrew Docherty
Head of Civic, Democratic & Legal Services

Scoping Report Approved



Date

17 Nov 2011

Specialist Implications Officer(s)

Wards Affected:

All



For further information please contact the author of the report

Background Papers:

York Museums Trust Partnership Delivery Plan – 2010/11 End of Year
Performance Update Report - September 2011

Annexes:

Annex A – Topic Assessment Form

Annex B – Partnership Delivery Plan 2008-13

SCRUTINY TOPIC ASSESSMENT FORM FOR COUNCILLORS
'ONE PAGE STRATEGY'

What is the broad topic area?

York Museums Trust

What is the specific topic area?

i.e. what should be included & excluded from the topic? What are the drivers behind the topic?

To look more closely at the Management of the Museums etc, i.e:

- the working of the Trust and its aims
- their decision making process and how this relates to the wishes of the council
- their consultation process

Ambitions for the review:

i.e. what is the review trying to achieve & why e.g. financial / efficiency savings and/or performance improvements? What will be different as a result of the review?

Transparency of the Trust's aims

(To understand how the decisions taken by the Trust are being made and to ensure they are working in line with the Partnership Delivery Plan)

To make the trust less of an independent organisation.

To ensure the Trust's accountability to the council and the public on a more frequent and intimate basis.

(For completion by the relevant Overview & Scrutiny Committee)

Does it have a potential impact on one or more sections of the population?

Yes No

Is it a corporate priority or concern to the council's partners?

Yes No

Will the review add value? and lead to effective outcomes?

Yes No

Will the review duplicate other work?

Yes No

Is it timely, and do we have the resources?

Yes No

If the answer is 'Yes' to all of the above questions, then the Committee may decide to proceed with the review. To decide how best to carry out the review, the Committee will need to agree the following:

1) Who and how shall we consult?

i.e. who do we need to consult and why? Is there already any feedback from customers and/or other consultation groups that we need to take account of?

2) Do we need any experts/specialists? (internal/external)

i.e. is the review dependent on specific teams, departments or external bodies? What impact will the review have on the work of any of these?

3) What other help do we need? E.g. training/development/resources

i.e. does this review relate to any other ongoing projects or depend on them for anything?

what information do we need and who will provide it? what do we need to undertake this review e.g. specific resources, events, meetings etc?

4) How long should it take?

i.e. does the timings of completion of the review need to coincide with any other ongoing or planned work

CITY OF YORK COUNCIL

AND

YORK MUSEUMS TRUST

PARTNERSHIP

DELIVERY PLAN

2008 -2013



yorkmuseumtrust
www.york.trust.museum

Introduction

- 1 This Partnership Delivery Plan is a joint agreement between the Council and the York Museums Trust and is an annex to the 'Funding Agreement'. It sets out:
 - the aims and objectives of the partnership
 - the key development areas to be pursued
 - core services to be provided
 - performance targets to be met by the Trust and Council
 - performance information to be provided
 - review and reporting procedures
 - partnership arrangements between the Council and the Trust
- 2 The Trust is an independent organisation working in partnership with the Council with the aim of delivering a Museums and Gallery service that will become recognised as one of the very best in the country. The Select Committee report on Museums and Galleries in 2007 said:

The Trust strongly recommend that any large local authority museum service motivated to seek improvement should look at the successful models operating in Sheffield and York.
- 3 This plan covers years five to ten of the Trust (2008 – 2013). It may, however, be updated by the Council and the Trust during that period in the light of changing circumstances. The Funding Agreement provides a process whereby the Plan will formally be reviewed by the Council and the Trust towards the end of the 5 years in order to create a new plan for the next 5 years.

Core Aims

- 4 The core aims of the partnership are drawn from 3 sources.
 - a) The Council's core objectives, particularly:
 - *Improve the way the council and its partners work together to deliver better services for the people who live in York*
 - b) York's Local Area Agreement, particularly:
 - Modernise the city's economy and increase its competitiveness:
 - Increase the average length of visitor stay by 1% per annum
 - Achieve a target of a 5% increase per annum in tourism earnings

- Increase the vitality of the city centre – as measured by footfall
 - Widen participation and raise attainment and skills levels throughout the working age population:
 - Increase the number of York residents of working age achieving a first Full Level 2 qualification
 - Increase in the number of Skills for Life qualifications achieved by adults in York
 - Develop the contribution of cultural activities, events and festivals to York's economy:
 - % of respondents who see York as “cosmopolitan” and “vibrant”.
 - Number of high quality events in the city
 - Number of visits to / usages of local authority funded museums / galleries
 - Conserve and enhance the existing environment and special character of the city.
 - Enhance the capacity of the voluntary and community sector to make high quality provision through support and development of volunteers
 - Improve the quality of and access to local cultural facilities
 - % of residents satisfied with local authority museums and galleries
 - Create a diverse programme of cultural and environmental activities, accessible to all, and increase participation in communities with low participation rates
 - Help communities become increasingly able to develop and direct their own cultural opportunities
 - Raise standards of achievement for children and young people
 - Improve enrichment opportunities for children and young people.
- c) The Trust's principal objectives:
- Vision:
- Our Vision is for York Museums Trust to play a major part in positioning York as a world class cultural centre.

Mission:

To cherish the collections, buildings and gardens entrusted to us, presenting and interpreting them as a stimulus for learning, a provocation to curiosity and a source of inspiration and enjoyment for all.

Strategic Objectives:

- To protect and conserve the collections, gardens and building
- To promote access to the collections, gardens and buildings appropriate to the 21st Century
- To create learning opportunities for all and develop innovative programmes springing from the collections, gardens and buildings
- To network and collaborate with partners and contribute to the development of the economic and cultural life of the city and the region
- To raise substantial funds to realise these aims

Context

- 5 York Museums Trust is now over five years old. The Trust has established itself as a successful independent charitable organisation both within the city and in the museum sector. The Trust has achieved the core objective of halting the long-term decline in the visitor numbers; indeed numbers have increased by 27% from 394,000 in 2002/03 to 502,000 in 2006/07.
- 6 Significant investments and improvements have been made in both the building fabric and care of the collections. A programme of renewals of the display and interpretation of the collections has also begun. An additional £3.5 million has been raised to date and there is now a long term plan to invest to improve the visitor's experience.
- 7 The Trust's role as the carers of the city's heritage enables it to take an interest in the cultural heritage of the city as a whole for both residents and visitors. There is a will to support and work with the city in its plans to improve the quality of the urban environment and the learning potential for a wide and diverse range of people.
- 8 Increasingly the Trust's work is being carried in partnership with other cultural and educational agencies. This has proved a highly successful way of increasing the Trust's impact in the city. These partners include local, regional national and international bodies.

- 9 The Trust now sees itself as an important agent for change outside of the boundaries that the City's museums have traditionally operated. The vision of York Museums Trust - to play a major part in positioning York as a world class cultural centre - reflects the level of that ambition.
- 10 Over the last five years the context within which the Trust has operated has changed considerably. The Renaissance in the Regions initiative has significantly improved the resourcing of the regional museums. Through this scheme central Government now directly funds a number of the larger museum services in the country. The recent comprehensive spending review has confirmed ongoing support of this national project and the Trust await the final decisions as to the funding of each of the nine regions.
- 11 Certainly the Renaissance project gave a great and necessary boost to YMT in its early years enabling investment in learning, collection management and documentation and the redisplay of the collections. The Trust is in the process of developing a three year plan for Renaissance's further investment in York's museums. The investment is currently around £500k per annum. An important principle of the agreement with government is that Renaissance funding must be truly additional to and not replace local authority funding for museums.
- 12 As YMT has gathered momentum the Trust has been able to operate as a support to the other museums in the region. There have been successful partnership projects with Wakefield and Scarborough with Celebrating Ceramics and a Community Archaeology project with North Yorkshire Archives and again Wakefield and Scarborough which the Trust wishes to continue. The Trust also takes part in the Regional Knowledge Bank and offer support to other museums in a variety of different ways including loans of objects, advice and CPD.
- 13 One of YMT's most important partnerships is the British Museum UK Partnership, of which York is the lead partner for Yorkshire, involving loans of objects, the Portable Antiquities project, exhibitions and joint acquisitions.
- 14 YMT is committed to:
 - Working in partnership with National Museums especially the British Museum to bring benefit to York through loans, exhibitions and acquisitions where relevant

- Developing long standing partnerships with regional museums to share our expertise and collections with as wide an audience as possible
- Working with the partners in Yorkshire Renaissance (Hull, Bradford, Leeds and Sheffield) to maximise the impact of the investment

15 With the Olympics coming to London in 2012 there has been a change in the landscape for all cultural and heritage organisations with the transfer of some of the lottery funding to the event. This is already beginning to have an impact on the sources for capital projects. This is a most significant change for YMT as all of our buildings require substantial investment over the next two decades. However the Trust has a plan for incremental investment across all the sites based on the support from the City of York Council, trusts and foundations, raising our own funding through commercial activity and increased ticket sales.

Key Development Areas

- 16 In order to achieve our objectives, the Trust is constantly reviewing its organisational structure to make sure that it has the right skills. For example, the Trust has recently renewed membership of the Enterprises Board which now has an impressive range of successful experts from the commercial sector helping us to be more effective in making money. One of our greatest assets is the Board of Trustees who have guided us over the last five years. Many Trustees are now coming to the end of their terms and so the Trust has selected new Trustees for their skills and experience. In 2008 the Trust intends to start a process of selection by open advertisement and interview.
- 17 With a view to progressing the St Mary's Abbey project the Trust will be appointing a Head Gardener to lead the development of the gardens. In furtherance of the objective to involve a diverse range of people in the Trust's work it will be expanding the Volunteers Manager role from part time to full time. Both of these positions will be funded through Renaissance in the Regions.
- 18 YMT will continue to work in partnership with individuals who are passionate about York and organisations whose business it is to celebrate and understand the city through the History of York project. Our aim is to deepen everyone's understanding of the importance of the city and its history through the new website and other manifestations such as a book, audio visual, trails etc.

- 19 YMT also have worked with other city partners on festivals such as Illuminating York which again the Trust is committed to continuing. The Trust therefore see our remit covering not only the care and interpretation of the buildings and collections in our care but also the wider cultural life of the city itself.
- 20 The key development areas within the Trust's portfolio are:
- **St Mary's Abbey**, which includes Yorkshire Museum, the Gardens, York Art Gallery and the Hospitium. The long term plan to open up the whole of the precinct making it accessible through new pathways and interpretation so that people can understand the significance of this unique area involves the following.
 - **York Castle Museum** through an incremental year-on-year investment in innovative public displays and facilities.

Principal Partnership Objectives

- 21 The Partnership will pursue the following objectives:
- a) York's Cultural Quarter
- Work in partnership with other funders and cultural and educational institutions to programme events and activities in the Cultural Quarter
 - St Mary's Abbey - create identity; promote Cultural Quarter concept
 - Yorkshire Museum - redevelop & redisplay
 - Abbey Gardens - increase use and public understanding; create new gardens interpret built heritage
 - Hospitium - create vibrant & profitable conference centre
 - York Art Gallery - provide varied high-quality exhibition programme; create a masterplan to transform the building, solving the DDA issues and creating new public space following relocation of the Archives
- b) Castlegate
- Maximise the existing potential of the Eye of York, Castle Museum, Fairfax House, the river and Clifford's Tower in partnership with English Heritage, the city and other partners
 - Castle Museum - invest substantial sums in new public facilities year-on-year to encourage repeat visits; solve DDA issues
 - York St Mary's - develop long term strategic uses

- History of York - grow number of brand applications; grow users to 500,000 per annum by 2013

c) Develop new audiences

- Audience Development - increase knowledge of audiences; formalise audience contribution to product development; grow to 850,000 visitors per annum by 2013
- Maintain high user satisfaction
- Continue to create new programmes of events and activities across all sites
- Grow the number of visits by York residents:
 - Carry out market research specifically on the interests of York residents
 - Establish a Volunteer Scheme - 1000 members will have participated by 2013
 - Produce publicity directed specifically for York residents
 - Develop the informal learning public programme
 - Develop partnership working with organisations within the city
- Schools & Learning more use by schools through access to collections, web based and outreach & research programme with Universities

d) The Collections

- Develop a long term plan with the City to improve the long term storage of collections and their access, and the building maintenance with an agreed 20 year building plan, long term loans for capital projects:
 - Create new storage facilities for the Castle Museum Collections
 - Find an alternative storage facility for the material in James Street to improve our control and minimise external risks.
 - Increase storage for the Fine and Decorative Art Collections as part of the redevelopment of York Art Gallery.
 - Resolve the storage of archaeological material excavated from the City of York which is currently housed by York Archaeological Trust.
- Complete retrospective documentation plan.
- Develop and begin a programme of research and publication.

e) Education strategy

- Develop partnerships with other museums in the region
- Contribute to the regional offer of a comprehensive service to schools
- Continue to develop formal education programmes for 14 to 19 years, HE and FE students: Accessing new parts of the collection
- Build on the offer to less advantaged and hard to reach groups including ethnic minorities, people with disabilities, and special needs
- Develop new workshop programmes and activities to access new parts of the collections
- Develop adult life long learning offers in partnership with existing providers.
- Develop volunteering as, and to deliver, informal learning

f) The Business Plan

The Partnership will maintain a business plan predicated on the agreed funding to 2013 that has the following objectives:

- The business plan will recognise that the Trust's financial position continues to depend heavily on York Castle Museum. It will be developed to ensure that the public offer at that site is regularly refreshed, particularly whilst major developments take place St Mary's Abbey Precinct.
- The business plan will aim to generate funds which can be transferred to capital from 2008/9 onwards in order to generate match funds for major capital refurbishment projects and to address the back-log of major repairs required.
- The Trust will seek to retain a level of reserves commensurate with the level of financial risk it faces over the life of the business plan. The target is currently £400k, rising to £500k during the life of this plan.
- YMT will aim to deliver 3% efficiency savings per annum in line with the budget (expectations set for local authorities) which it will reinvest in the service.
- YMT will develop other income streams, in particular through its conference and hospitality business, York Venues, centred on the refurbished Hospitium building.

- Renaissance in the Regions – this national source of funding will continue to support YMT management posts. It also will grow over the next few years to support capital work and other revenue programmes. It is an important condition of this funding that it is additional to core funding and so would be threatened by any reduction in real-terms in the Council’s funding of YMT.
- The business plan will be developed in such a way that creates a smooth transition into funding for the period 2013-18. This will be negotiated in the light of resources available to the Council and with the objective of maintaining access to Renaissance funding.
- The Council will continue to make available the existing capital pot (originally £1.8m). The Council will continue to seek ways of making further capital available to YMT through its capital programme, through prudential borrowing facilities and through the Council’s Venture Fund

Services

22 The core services that YMT will provide at the Castle Museum, the Art Gallery, and St Mary’s Castlegate will be as set out in the respective leases.

23 In the case of the Yorkshire Museum and Gardens the respective roles of the Council and YMT are defined by their status under the charitable scheme as Custodian Trustee and Managing Trustee respectively and the heads of terms agreed with the Yorkshire Philosophical Society.

In addition to undertaking the role of managing trustee YMT will undertake to:

- Provide at least 2,534 hours of public opening at the Yorkshire Museum
- Provide free admission to the permanent collections of the Yorkshire Museum for all citizens of the City of York (charges may be applied in the case of temporary or touring exhibitions)
- Use all reasonable endeavours to maintain the existing registration of the Museum Gardens on the Register of Parks and Gardens of Special Historic Interest maintained by English Heritage
- Use all reasonable endeavours to maintain the registration of the gardens as botanical gardens
- Give public access to the gardens daily (except Christmas Day) unless closure is necessary for reasons of public safety. Opening

hours will be 7:30 am to 6:00 pm in Winter and 7:30 am to 8:00 pm in Summer

- Permit access to the Museum Gardens for all civic ceremonial and similar events promoted by the Council on up to 10 days in each year provided that the Council give as much notice as is practicable and provided that where the Council requires access at times outside the normal opening hours set out above YMT may restrict (but not prohibit) access for the purpose of maintaining security and/or good estate management
- Insure, with an insurer of repute, third party and property owner's liability risk with a limit of indemnity of at least £10 million in respect of any one occurrence
- Indemnify the Council against any claims, proceedings or demands, and all damages, losses, costs, and expenses incurred arising out of any accident, loss or damage to persons or property occurring in or on the premises of the Yorkshire Museum and Gardens
- Use all reasonable endeavours to keep the premises in good repair, this responsibility to be construed in the light of the relevant clauses in the Transfer Agreement, the condition surveys and the provisions contained in paragraphs 39 – 41 of the Executive report of 26 July 2002 (see the Council's corresponding responsibility below)

In addition to carrying out the role of custodian trustee the Council will undertake to:

- Keep the premises insured with an insurer of repute against the insured risks (i.e. fire, lightning, earthquake, explosion, aircraft (other than hostile aircraft and other aerial devices or articles dropped therefrom, riot, civil commotion, malicious damage, storm or tempest, bursting or overflowing of water tanks, apparatus or pipes, flood, and impact by road vehicles, subsidence, heave, and such other risks as may from time to time be reasonably required by the Council or by YMT) in a sum which in the reasonable opinion of the Council represents the full replacement cost, subject to such uninsured excess as the insurer may properly apply. The Council will deduct the cost of the premium from the annual grant to YMT.

The Council will not be obliged to insure YMT's fixtures and fittings, boilers, lifts, escalators, or other plant and machinery in and exclusively serving the premises. The Council will not be obliged to insure fixtures and fittings that may become part of the premises until YMT has notified the Council in writing of their reinstatement value.

Following damage or destruction by any of the insured risks the Council shall apply the net proceeds of the insurance monies received to the rebuilding or reinstating of the premises.

- In the first instance the Council will retain liability for any major failures to roofs and external walls. Major failures will be defined as those where the cost of the repairs is greater than £25k and which prevent the tenant from reasonably carrying on their business at the premises. All other categories of repair and maintenance will be responsibility of the Trust (see above)

Review and monitoring

24 The procedure will involve:

- a) Twice yearly review of performance between the partners:
 - the Trust will provide performance information as set out above
 - senior managers from the Trust (i.e. the Chief Executive and/or the Director of Finance & Business Development) and the Council (i.e., the “Client Officer” and/or the Assistant Director for Lifelong Learning and Culture) will meet to review performance against the agreed indicators. Meetings will be set a year in advance and will normally be held in April and September
 - YMT will submit a performance report to the Council’s Executive Member in May and October each year. The YMT Chief Executive will attend the meeting to present YMT’s report and respond to any questions
- b) YMT will provide performance information as requested by the Council to any ad hoc scrutiny reviews conducted by the Council from time to time and attend the relevant meetings to respond to members’ questions

25 Within this process information will be provided by the Trust to the Client Officer in the following areas as a minimum:

- 1) achievement of the principal partnership aims set out above
- 2) visits to each of the Trust’s sites and temporary exhibitions including the number of uses by residents (actual and as a % of all users and segmented into demographic groups)
- 3) number of hours the collections of the Trust are available to the public during the financial year at each of the sites
- 4) implementation of agreed capital schemes
- 5) development of new income streams

- 6) development of new exhibitions and interpretative services
- 7) development of collections storage
- 8) delivery of the education service including the number of school groups using the Trust's services: (a) actual numbers of all school users, and % as compared to all visits; (b) numbers of local school users and % of total city catchments, and number of local people taking up life-long learning opportunities offered by the Trust
- 9) number of events/activities where learning forms a substantial component of the activity. Number of adults participating in those activities
- 10) use and involvement of local people including numbers volunteering
- 11) engagement with the ward committee process through attendance at committees and articles in ward newsletters
- 12) achievement of visitor satisfaction (aggregate over the year and by site)
- 13) level of external investment applied for and secured
- 14) number of residents consulted through focus groups, surveys and other means including a) young people, b) older people, c) target groups for inclusion
- 15) copies of management accounts
- 16) progress on cataloguing the collections and documentation
- 17) acquisitions and disposals from the collections
- 18) number of uses of the Yorkshire Museums Gardens for activities and events

Partnership Arrangements

- 26 The Council and the Trust will through this partnership ensure the delivery of Best Value and its principles in order to deliver continuous service improvement.
- 27 The Trust and the Council will continue to explore options for further partnerships:-
 - a) the Council being mindful of the potential of the museums and art gallery to provide a positive contribution to its cultural, educational, economic, social and environmental agenda
 - b) the Trust being mindful of the experience and specialist services that the Council can offer

- 28 The Trust will represent the Council on museums issues at international, national, regional and local level and continue to advise members of the Council on museums policy. The Trust will provide this service to the Council without charge provided that the work is broadly in furtherance of the objectives of this partnership. (Otherwise a fee can be negotiated).
- 29 The Trust and the Council together will make every effort to work closely with other museum and heritage providers in the city, ensuring that appropriate forms of liaison are used to encourage the development of strong, inclusive partnerships.
- 30 The Trust will maintain a role in the civic life of the city. It will provide facilities for hosting civic events (subject to operational availability) charging for them at cost. The Council will treat the Trust on same terms as an internal Council department with respect to the use of rooms at the Guildhall.
- 31 The Council and the Trust agree to the application of the 'Nolan principles' (The seven principles of public life) to their operations and the partnership working between the two organisations.
- 32 The following objectives will underpin the conduct of partnership business, to:
 - a) demonstrate responsible governance of the Trust to its principal beneficiaries, the citizens of York, having regard for the extent of funding by the Council
 - b) involve the community in key decisions affecting the objectives, policies and delivery of the services managed by the Trust, making the processes of decision-making as transparent as possible
 - c) work to published standards of collections accessibility and customer care, and to routinely make public the resulting performance attainment
 - d) encourage, and respond to, ideas and suggestions from the community in regard to the display and interpretation of the permanent collections, the subject matter of temporary exhibitions, and the scope of outreach activities
 - e) respond openly and constructively to complaints, demonstrating that they have been adequately investigated
 - f) take such steps as are necessary to be satisfied that the Trust is, as far as is reasonably practicable, meeting the expressed aspirations of the community in regard to museum services.

- 33 The partnership will support the governance arrangements set out in the founding legal documents as follows:-
- a) governance of the Trust is overseen by the Board of Trustees, meeting regularly
 - b) the composition of the Board attempts to reflect knowledge and experience of the major activities and responsibilities of the Trust
 - c) community interests are expressly represented by two City of York Councillors being Trustees
 - d) when vacancies occur on the Board, the Trust will seek community candidates for consideration by advertising in local media. The Council will assist in this by advertising for example in the Council newspaper and in Ward Committee newsletters
 - e) the Trust publishes details of trustees appointed, their professional qualifications and experience, and a register of their business and public interests
 - f) below the board, the management of the Trust is vested in the Chief Executive, working within delegated authorities from the Board
 - g) the Chief Executive is supported by a team of senior managers, each responsible for a designated area of activity.
- 34 The following principles will underpin the conduct of business:
- a) the minutes of the meetings are available for inspection on request at each of the three museum / gallery locations, and are made available by the Council using its normal mechanisms [and available on the YMGT the web site (when available)]
 - b) strategic plans of principal areas of activity of the Trust, once endorsed by the Board, are also placed on deposit at the Central Library
 - c) other Board papers, unless they are specifically deemed to be confidential, may be inspected by members of the public on request to the Chief Executive's office at St Mary's Lodge
 - d) Board meeting agendas will normally be available for inspection at the three museum / gallery locations and on the YMGT the Trust's website in advance of each meeting
 - e) a report of recent business is included in the quarterly CYC newspaper
 - f) the Trust publishes a public Annual Report, and a mid-year performance update
 - g) the AGM is held in public, and details are promulgated in local media

- h) an annual 'Meet the Trustees' event is held, giving the public the opportunity to question the Board on performance and future plans

35 The Trust will also aim to:

- a) establish a number of advisory bodies to work with groups and individuals in specific / specialist areas of activity. Representation from appropriate local groups, etc. will be sought
- b) develop a consultation strategy which specifically includes seeking the views of young people on specific aspects of the trusts services and future plans
- c) attend the Council's ward committee meetings on a rolling programme basis

36 Public consultation will be carried out on any issue of major public impact. Mechanisms of effective consultation with the public appropriate to the issue in question will be discussed with the Council, who will assist the Trust in carrying out consultation.

Role of the Council

37 The Council will:

- Support YMT's vision of positioning York as a world class cultural centre
- Ensure that YMT's ambitions fit with and are part of the Council's economic development plans
- Enable YMT to become involved in relevant key strategic partnerships
- Involve YMT at an appropriate level in City projects of cultural importance
- Actively support YMT's work to raise investment funding from external sources

Principles

38 The Partnership will ensure that the service is operated in accordance with the Museums Association Code of Ethics and will take all necessary steps to maintain the Registered status of the Museums and Gallery, and the Designated status of their collections.

Learning & Culture Overview & Scrutiny Committee Work Plan 2011-12

Meeting Date	Work Programme
21 June 2011 @ 5pm	<ol style="list-style-type: none"> 1. Introduction to Committee Remit & Terms of Reference 2. Presentations by Assistant Directors on ongoing work within directorates & future planned work 3. Report on Draft Workplan for 2011-12
3 August 2011 @ 5pm (TBC)	<ol style="list-style-type: none"> 1. Attendance of Relevant Executive Members 2. York Theatre Royal – Service Level Agreement Performance Update Report & Briefing on Renewal of Contract in April 2012 (Liz Wilson to attend) 3. Workplan
28 Sept 2011 @ 5pm	<ol style="list-style-type: none"> 1. York Museums Trust Partnership Delivery Plan – Performance Update Report & Renewal of Partnership Delivery Plan for 2013-18 (Janet Barnes & Keith Bartlett to be invited to attend) 2. First Quarter Finance & Performance Monitoring Report 3. Presentation on Demographics in York Primary Schools 4. Update Report on implementation of recommendations arising from previously completed reviews - Cultural Quarter & Casual Play 5. Workplan
11 October 2011	Tour of Theatre Royal & De Grey Buildings followed by performance of '40 Years On'
2 November 2011	Demographics Scrutiny Review – Informal Information Gathering Session
7 Dec 2011 @ 5pm	<ol style="list-style-type: none"> 1. Second Quarter Finance & Performance Monitoring Report 2. Presentation on Corporate Parenting 3. Demographics Review – Formal Interim Report 4. York Museums Trust – New Topic Assessment Report 5. Workplan
25 Jan 2012 @ 5pm	<ol style="list-style-type: none"> 1. Attendance of Chair of York@Large & Chair of Learning City 2. York Theatre Royal – Service Level Agreement Performance Update Report 3. Presentation on Managing Public Parks 4. Corporate Parenting Review Scoping Report 5. Workplan
21 March 2012	<ol style="list-style-type: none"> 1. Third Quarter Finance & Performance Monitoring Report 2. Workplan

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