



Department
for Education

Norfolk and Suffolk Area Review

Final Report

August 2017

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Background

In July 2015, the government announced a rolling programme of around 40 local area reviews, to be completed by March 2017, covering all general further education and sixth-form colleges in England.

The reviews are designed to ensure that colleges are financially stable into the longer-term, that they are run efficiently, and are well-positioned to meet the present and future needs of individual students and the demands of employers. Students in colleges have high expectations about standards of teaching and learning and the extent to which their learning prepares them to progress further, to higher education or directly into employment.

The local steering group was jointly chaired by Dr Peter Funnell (Director, Oakmere Solutions Ltd), nominated by Norfolk and Suffolk local authorities and the New Anglia Local Enterprise Partnership (LEP), and the Further Education Commissioner. The steering group met on 5 occasions between December and March and additional informal meetings also took place to consider the local curriculum offer and develop options in greater detail. Membership of the steering group comprised each college's chair of governors and principal, representatives from Norfolk County Council, Suffolk County Council, the New Anglia Local Enterprise Partnership and Job Centre Plus, the Regional Schools Commissioner, and representatives from the Skills Funding Agency (SFA), the Education Funding Agency (EFA), and the Department for Education (DfE).

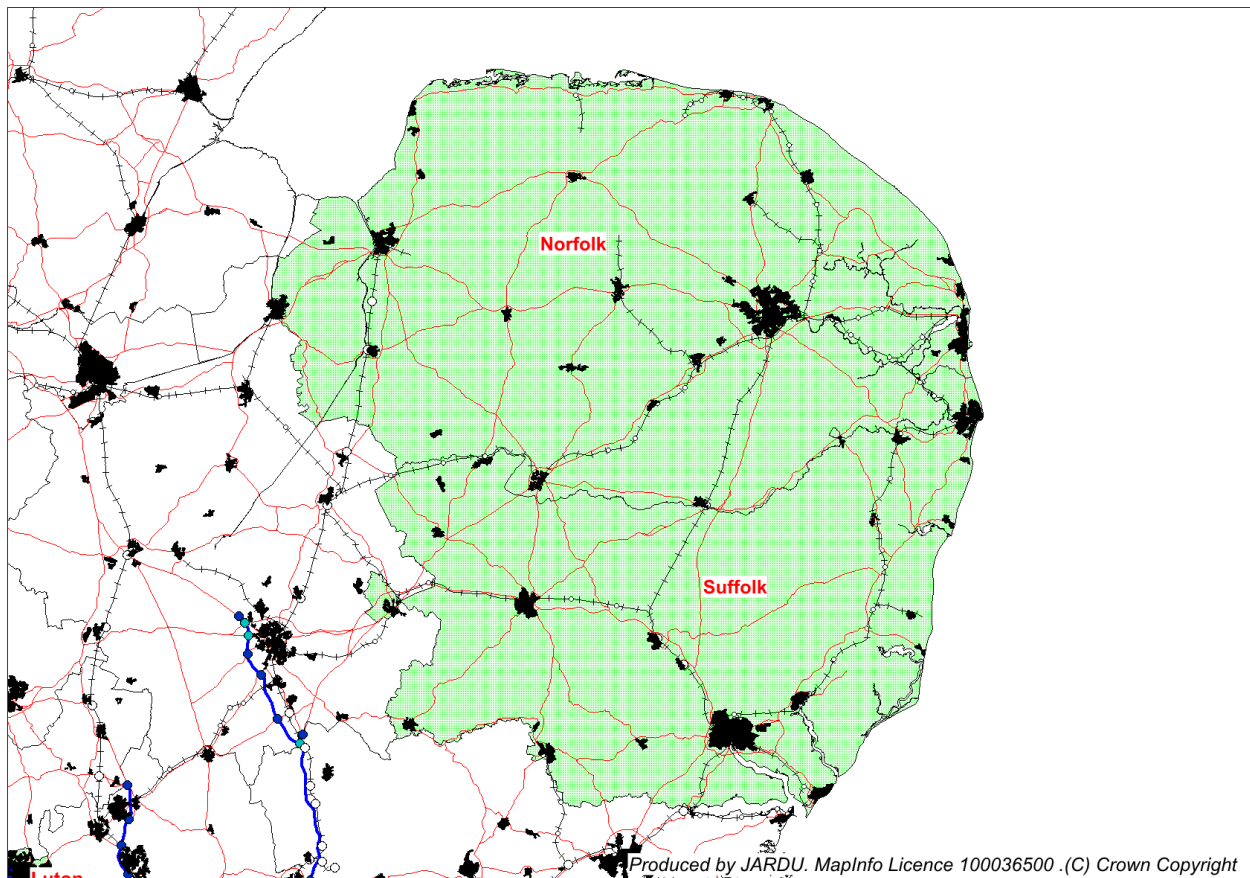
Visits to colleges and support throughout the process were provided by staff from the Further Education and Sixth Form College Commissioners' teams. The Joint Area Review Delivery Unit (JARDU) provided the project management, administrative support and developed supporting materials and papers used by the steering group. JARDU also led on consultations with local stakeholders.

The needs of the Norfolk and Suffolk area

Demographics and the economy

The Norfolk and Suffolk area review covers the two counties of Norfolk and Suffolk which, combined, constitute the area of the New Anglia LEP. The area comprises a population of over 1.6 million residents.

The area is illustrated on the map below:



The table below provides a snapshot of key demographic and economic data¹, which has acted as a starting point for this review.

¹ ONS Local Authority Profiles – see data annex – Local socio-economic data. Please note that ONS update the data set on a regular basis and that the data included relates to the point at which the report was written.

	Norfolk	Suffolk	Great Britain
Total population (2015)	885,000	741,900	63,258,400
Population aged 16 to 64	59.6%	59.5%	63.3%
% with higher education qualifications ²	28.4%	27.8%	37.1%
Those formally qualified to level 2+	67.9%	67.5%	73.6%
Gross weekly pay £ of residents	494.6	519.0	541.0
Gross weekly pay £ by workplace	488.7	494.3	540.2
Out-of-work benefit claimants	1.5%	1.4%	1.9%
% of main benefit claimants	7.9%	6.9%	8.6%
Jobs density ³	0.80	0.83	0.83
Total workplace units:			Average for the East of England
Micro ⁴	82.7%	83.4%	85.1%
Small	14.3%	13.7%	12.1%
Medium	2.6%	2.5%	2.5%
Large	0.3%	0.3%	0.3%

2 Percentages relate to those aged 16 to 64

3 Job density relates to the level of jobs per resident aged 16-64. For example, a job density of 1.0 would mean that there is one job for every resident aged 16-64. The job density for the East of England as a whole is 0.81, which is slightly below the national average of 0.84.

4 Micro-businesses have a total of 1 to 9 workers; small businesses have 10 to 49 workers; medium have 50 to 249; large have 250+ (2016 data).

The key points to note are:

- Great Yarmouth, a coastal town in Norfolk, is listed in the top 10% of most deprived towns in England⁵. Lowestoft, another coastal town in North Suffolk, also has areas of high deprivation, as does the area around Thetford, which is near the Norfolk/Suffolk border
- Norfolk and Suffolk have a lower proportion of residents at working age than the national picture
- fewer Norfolk and Suffolk residents are educated to level 2 than the national average. Similarly, there are fewer residents in the review area with higher level qualifications compared to the national average
- salary levels in Norfolk and Suffolk are considerably lower than the national average, both when looking at the average pay rate by resident and by workplace although in both cases workplace pay is higher, suggesting a degree of travel to access work out of the residents' home area
- the proportion of benefit claimants overall and those on out of work benefits across Norfolk and Suffolk are lower than the national average
- the job density level for Norfolk is slightly below and for Suffolk exactly at the national average
- Norfolk and Suffolk have a slightly lower proportion of micro businesses and a slightly larger proportion of small businesses than the regional average, but the proportion of medium and large businesses is around the regional average.

Patterns of employment and future growth⁶

The Norfolk and Suffolk workforce is spread across a diverse range of industries and activities. This has helped ensure the strength and resilience of the local economy.

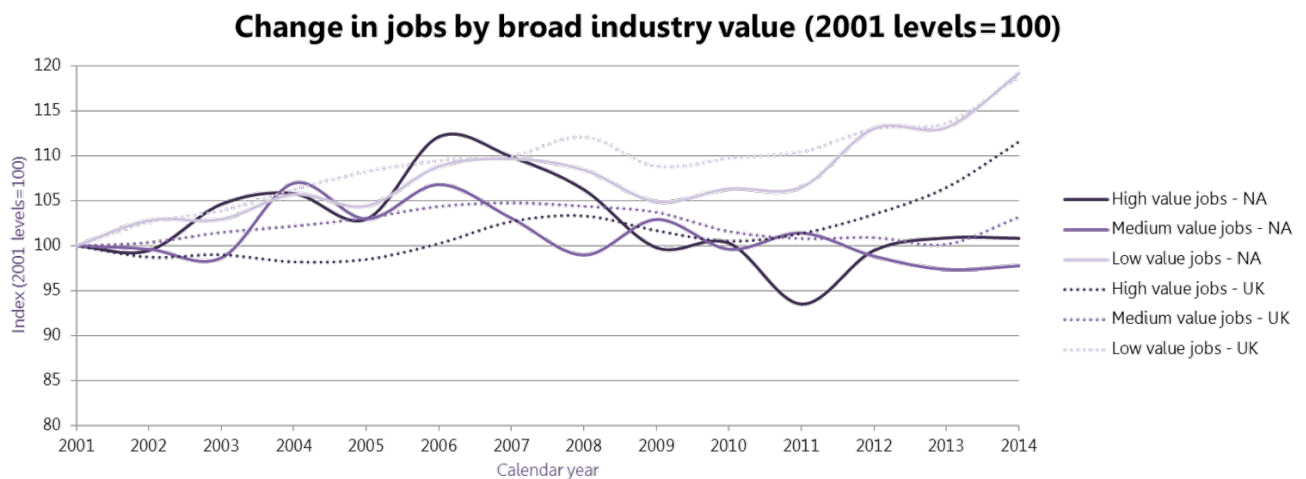
The Cambridge Insights data shows that the New Anglia area has significantly higher than average proportions of its workforce employed in sectors such as agriculture, food and drink (38,200), manufacturing (69,000), transport and logistics (41,200), health and care (106,500) and tourism (56,500), while there are lower than average proportions in some higher value service industries such as law, consultancy, ICT and scientific and technical.

Manufacturing also accounts for a higher than average proportion of jobs, especially in rural and semi-urban areas. This is mostly lower value manufacturing, but with niche specialisms in higher value and advanced activities.

⁵ Index of Multiple Deprivation for England in 2015: see data annex

⁶ [Cambridge Insights, East of England Forecasting Model](#)

Since 2009 there has been comparatively high growth in employment in sectors such as health and social care, accommodation and food, agriculture and business services - all significantly above the national average. However, a disproportionate number of new jobs in these growth sectors have been of a low quality and low value nature. Whilst these types of jobs may have supported the local economic recovery, continued reliance on them will have implications for sustained growth, productivity, pay and security levels and welfare. The graph below indicates the comparative projected change in the jobs market between those jobs considered high value and those that are low value in terms of productivity.



(Source: Cambridge Insights, East of England Forecasting Model 2016. In the key, NA relates to the New Anglia LEP area)

Analysis of the Cambridge Insights East of England Forecasting Model data and UKCES Working Futures⁷ data indicates that New Anglia is over-represented in lower-to-mid skill occupations and under-represented (quite significantly) in higher skill occupations in relation to the national average. A look at how this breakdown has changed over the past few years suggests a trend toward an ‘hour-glass’ economy with growth and accumulation in lower-skilled, service-based roles and (albeit from a lower baseline in terms of numbers of individuals) highly-skilled technical roles but a decline in middle skill and labour intensive operations. This is likely to be due to such skills being most susceptible to digitisation, automation and outsourcing.

Hard-to-fill vacancies and skill shortage vacancies fluctuate between different industries. Analysis of the UKCES Employer Skills Survey for the area⁸ indicated that transport and communications (ICT/digital) employers saw almost half of all vacancies unfilled due to skills shortages, while there is also evidence of skills shortages in construction and manufacturing, two large employment industries.

⁷ [Working Futures](#) data and [labour market projections](#)

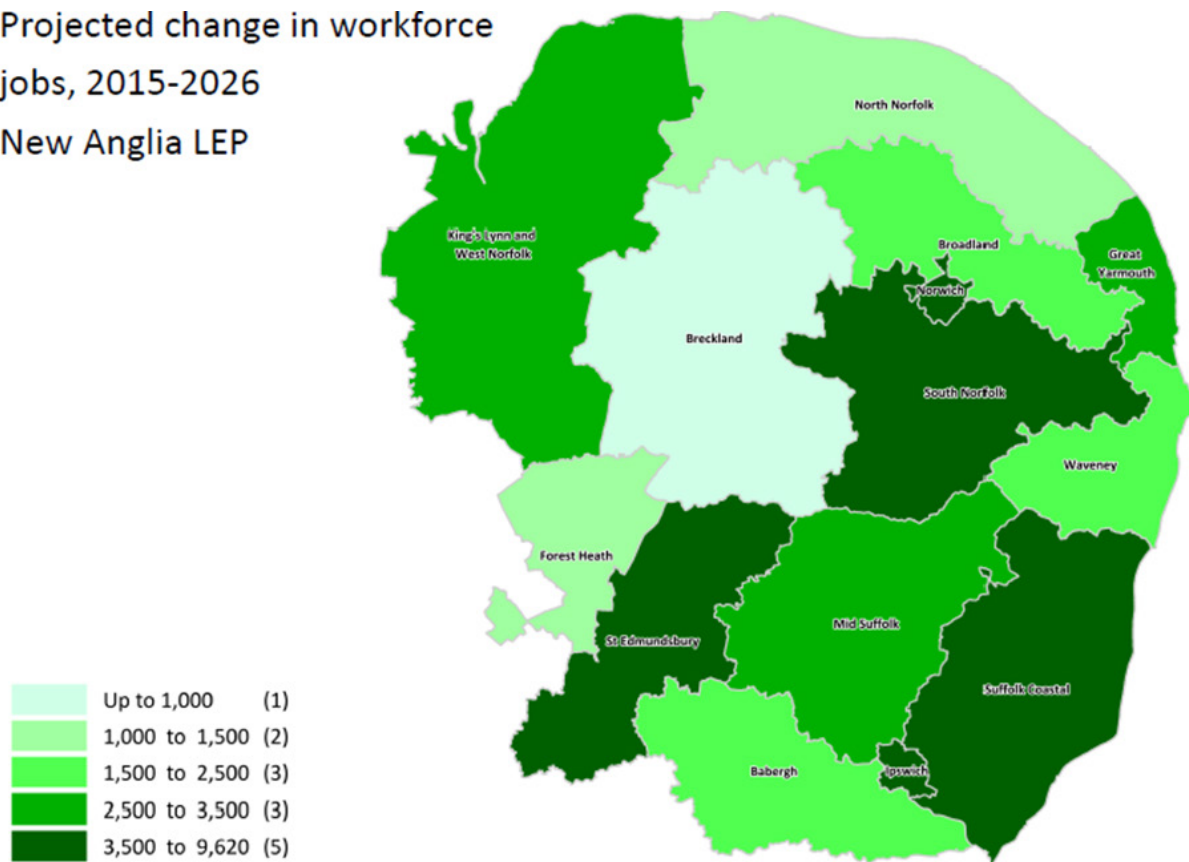
⁸ [UKCES Employer Skills Survey](#)

Employment and skills forecasts⁹

It is expected that Norfolk and Suffolk will experience robust jobs growth (6.4%) greater than the national average (4.8%), with some areas faring better than others. In contrast to trends since the recession, the urban areas of greater Ipswich and greater Norwich are expected to lead the way, due to favourable industrial and demographic profiles.

In total, there is expected to be a net increase of 50,000 new jobs across the two counties taking into account around 426,000 new jobs expected to be created between now and 2026 and also accounting for replacement jobs as people leave the labour market (retirement, migration and changing industries). The map below shows the variations in expected density of growth in workforce jobs across the New Anglia LEP area between 2015 and 2026:

Projected change in workforce jobs, 2015-2026
New Anglia LEP



(Source: Cambridge Econometrics, East of England Forecasting Model 2016)

The area expects to see employment growth in all of the key sectors identified by the LEP. The greatest growth in productivity will be achieved through innovative activity requiring high

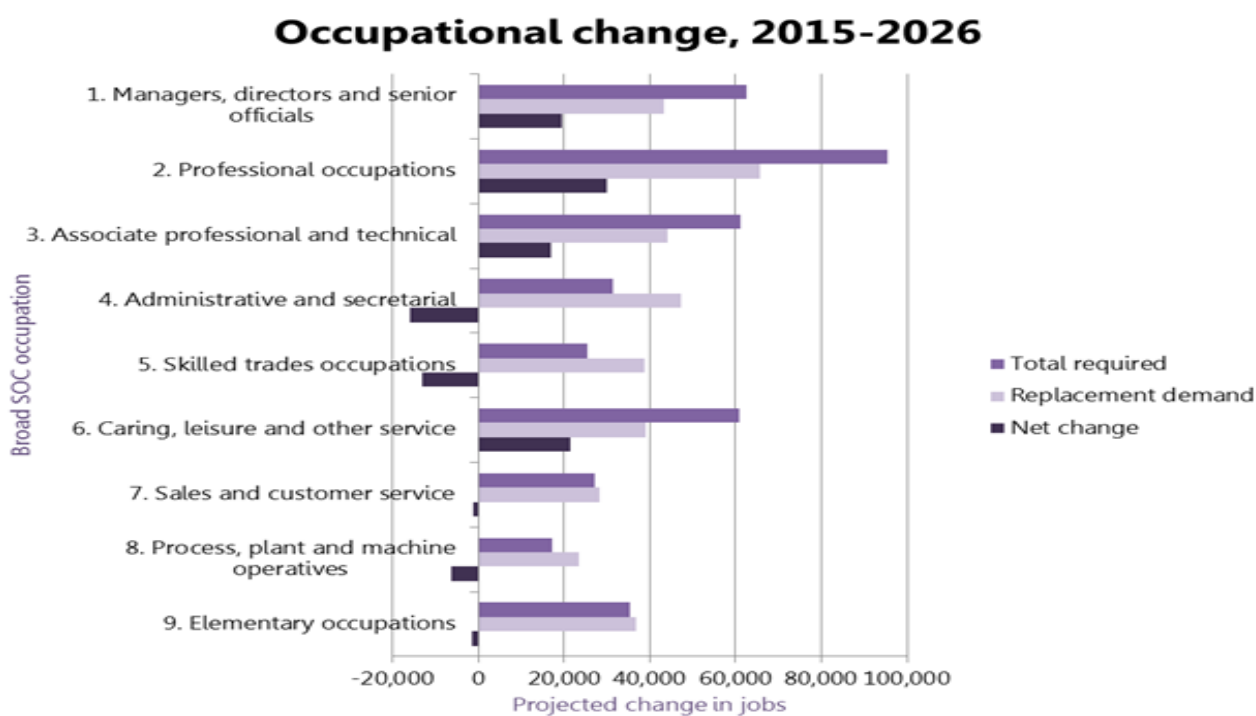
⁹ [Cambridge Insights, East of England Forecasting Model](#)

value jobs in sectors such as digital, agri-tech, energy, advanced manufacturing and life sciences.

In order to meet this demand and attract talented young people, learning providers need to offer leading edge technical and professional skills programmes, including apprenticeships, that meet the needs of these sectors.

Labour market forecasts¹⁰ provide an indication of the expected net growth or decline of jobs in local industries. Health and care (+63,000), wholesale and retail (+69,000), accommodation, food and drink (+35,000) and construction (+35,000) are all expected to provide a significant number of jobs between now and 2026, with the highest increase in jobs in construction and health and care. It should be noted however that even in industries with declining jobs or little net growth (such as manufacturing) replacement demand means that there is still forecast to be a significant demand for skills and jobs to be filled (+22,000 in the case of manufacturing).

The chart below shows the expected change in the key industrial sectors in the New Anglia LEP area between 2015 and 2026¹¹:



Alongside this insight into sector employment, forecasts¹² suggest a surge in higher skilled occupations driven by demands for more able employees to manage and analyse advanced and technically demanding products and processes across the economy. Although there is

¹⁰ [Cambridge Insights, East of England Forecasting Model](#)

¹¹ [Cambridge Insights, East of England Forecasting Model 2016](#) and [UKCES, Working Futures 2014](#)

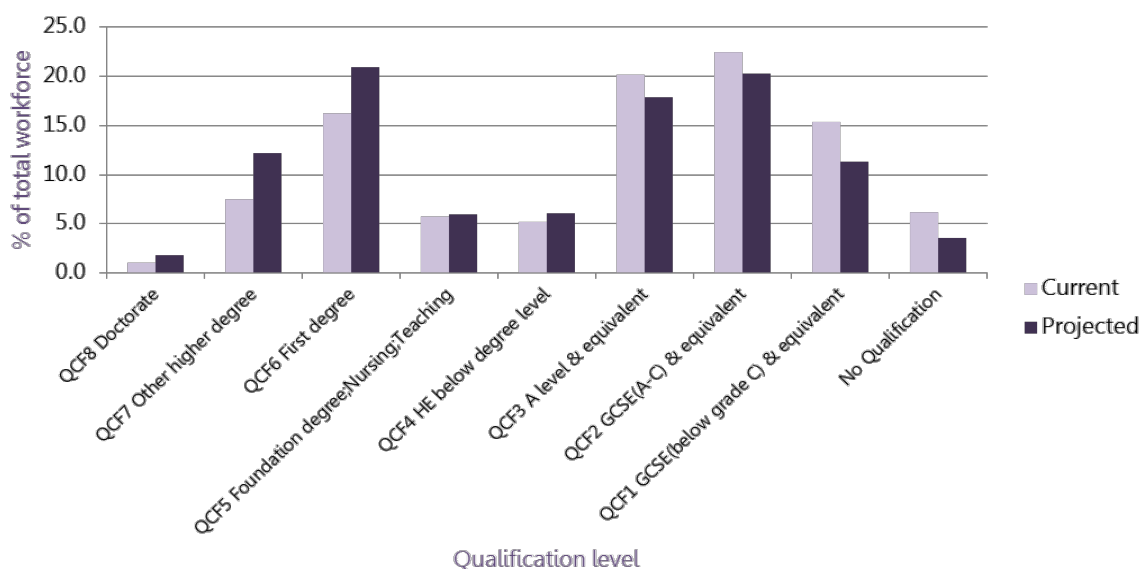
¹² [Cambridge Insights, East of England Forecasting Model 2016](#) and [UKCES, Working Futures 2014](#)

also some expected growth in lower skill occupations, there is a differentiation between a decline in manual/trades occupations and the increase in service orientated low skill occupations.

Breaking this occupational profile down further, forecasts suggest that a significant proportion of the jobs required up to 2026 will be managers, directors and senior officials. The region will need talented leaders in these positions to help initiate and steer growth and innovation. In total it is estimated that 63,000 jobs for this group will be required (20,000 of which will be new jobs created as opposed to replacement demand).

The New Anglia area’s working-age population has fewer qualifications than the England average; placing it as 26th of 39 LEPs for qualifications levels¹³. This means that businesses often struggle to find the skills needed, especially for higher scientific and technical roles in some of the key sectors and, as a result, many of the available high value jobs go to an imported workforce.

Current and projected qualification level



As indicated in the chart above¹⁴, the demand for higher qualification levels in the workforce is expected to increase over the next decade to complement this shift in occupations, with significant increases in those achieving degree level or higher level qualifications. High quality provision of the right type of qualifications at these levels, therefore, needs to be made available to ensure the challenges of under-employment and ‘hard-to-fill’ vacancies are overcome.

¹³ [UKCES, Working Futures 2014](#)

¹⁴ [Cambridge Insights, East of England Forecasting Model 2016](#) and [UKCES, Working Futures 2014](#)

43% of employers in the New Anglia LEP area¹⁵ have at least one hard-to-fill vacancy with 19% of all vacancies being considered hard-to-fill primarily, from the perspective of employers, due to a lack of the right level of skills being available or, in the case of low value jobs, the low numbers of applicants. Alongside this, 40% of locally resident graduates enter non-graduate jobs and too few enter the SME sector. While many locally resident young people are successful, too many of those who are well qualified are underemployed in jobs not utilising their skills and abilities, or do not have skills in the specific technology disciplines particularly needed to drive growth in high impact sectors.

New Anglia has the 4th oldest workforce of all the LEP areas, which accentuates the demand for skills¹⁶. Even in sectors of declining total job numbers, an older age profile means there will be significant replacement demand. An ageing demographic also has implications for consumer supply and is in part driving the growth of some sectors such as health and care, retail and construction.

Average pay in Suffolk and Norfolk is below national levels. Disproportionate growth in lower quality and lower paying employment, and the flat lining of productivity, has seen subdued growth in economic output and incomes (the actual conversion of work into the output of goods and services)¹⁷. It is estimated that this productivity challenge has cost the East £7.2bn.

The region also has relatively low levels of enterprise (New Anglia had the second lowest rate of business creation amongst the 39 LEPs in 2014) which limits new employment possibilities for individuals and hinders innovation in the economy.

In addition, worklessness and a lack of social mobility reduces the prospects for individuals. Although overall unemployment levels are low, some parts of the region still suffer from higher unemployment, particularly amongst the young. When young people in some areas do secure employment it is often short term or part time, low skilled, low paid work and does not therefore lead to a sustainable future for them and their families.

LEP priorities¹⁸

New Anglia is currently the 14th largest LEP economy and growing faster than 'powerhouse' areas such as Sheffield, Leeds and Manchester¹⁹. It accounts for some 790,000 jobs, 60,000 businesses and £35.354bn of economic goods and services.

¹⁵ New Anglia LEP Analysis of [UKCES Skills Survey](#)

¹⁶ [NOMIS workforce employment data \(2015\)](#)

¹⁷ New Anglia LEP Analysis of [ONS Business Demography data \(2015\)](#)

¹⁸ [New Anglia Strategic Economic Plan \(SEP\)](#) and [SEP Impact Report](#)

¹⁹ [ONS Regional Accounts data \(2015\)](#)

The New Anglia LEP has set ambitious targets for growth, such as 95,000 new jobs, including 5,000 new apprenticeships by 2019, and 10,000 new businesses by 2026. The LEP is also committed to eliminating the productivity gap between Norfolk and Suffolk and the rest of England.

By 2026 it wants the New Anglia economy to comprise 855,000 jobs, to have seen an increase of 1,000 businesses operating year on year, for gross value added (GVA) per job to equal the national average and to have built 117,000 new houses from the 2012 baseline. These growth ambitions will only be achievable if there is a sufficient supply of the right skills within the workforce, employed in jobs of high productivity.

The LEP has identified key growth and underpinning sectors. These include industries and activities in which Norfolk and Suffolk have:

- a comparative advantage
- or have large growth potential (in either employment or value terms)
- or that play a significant role in the local economy.

New Anglia’s growth and underpinning sectors are as follows²⁰:

<p>Tourism and culture</p> <ul style="list-style-type: none"> • employs over 55k people and brings over 29m people to the region • over 29m visitors to the region • East Anglia has the largest tourism share outside greater London • significant growth in foreign visits in recent years 	<p>Health</p> <ul style="list-style-type: none"> • sector accounts for 14% of employment in the area and is expected to increase – some 63,000 between now and 2026 • New Anglia is a major retirement destination, and is the fourth oldest LEP in terms of median age 	<p>Energy (incl. renewables)</p> <ul style="list-style-type: none"> • Employs over 8,000 and turn overs £3.7bn p.a. • more than £50 billion to be invested in the next 20 years • world’s largest wind farm in development • opportunity for historically weaker economic areas
<p>Food, drink and agriculture</p> <ul style="list-style-type: none"> • directly employs over 15% of the New Anglia workforce 	<p>Agri-tech</p> <ul style="list-style-type: none"> • world class expertise in food, plant and health science 	<p>Advanced manufacturing</p> <ul style="list-style-type: none"> • third most valuable sector and large employer for the area

²⁰ [New Anglia SEP \(2013\)](#) and [SEP Impact report \(2016\)](#), [Cambridge Insights, East of England Forecasting Model 2016](#) and [UKCES, Working Futures 2014](#).

<ul style="list-style-type: none"> • higher value activities in comparison to national • large supply chains and indirect impacts • globally recognised brands and products 	<ul style="list-style-type: none"> • proximity to largest agriculture market in the UK • New Anglia has the largest agricultural sector out of 39 LEPs • historic leader in agricultural innovation and research and development 	<ul style="list-style-type: none"> • declining in absolute terms, but requires 35k workers by 2026 • niche specialisms e.g. automotive, plastics and metal
<p>Financial and insurance</p> <ul style="list-style-type: none"> • largest financial centre in the East of England • 10th largest finance industry out of 39 LEPs • strong inward investment opportunities 	<p>Transport and logistics</p> <ul style="list-style-type: none"> • sector worth £1.3bn • employs over 41,200 people in the area • home to internationally renowned Felixstowe port • more freight enters New Anglia than other part of the UK 	<p>ICT/digital/creative</p> <ul style="list-style-type: none"> • internationally renowned assets and innovations • small sector, but fast growing (55% growth in New Anglia since 2008 vs 20% UK)

The New Anglia LEP Strategic Economic Plan (SEP) Impact report has formally adopted the construction sector as the an additional underpinning sector. This sector requires 29,000 new entrants each year to replace workers leaving; it accounts for 7% of local employment and this is expected to rise. Skills provision and quality have a vital role to play in supporting the growth and dynamism of these key sectors which collectively account for around 43% of the workforce²¹. However, due to the boom and bust nature of the construction sector, offering sufficient suitable training is a challenge.

Employment proved resilient during the recent recession and has since recovered at an unprecedented rate²². More people than ever before are in employment. This does not, however, mean this is a labour market without challenges. The demand for skills is outstripping supply across the local economy in many of the key sectors, including engineering, logistics, computing, digital creative, agri-tech and health. The key challenge in meeting this demand is that the resident workforce is ageing, low skilled and low paid.

A highly skilled and flexible workforce is pivotal to increasing productivity and unlocking the significant growth potential of Norfolk and Suffolk. By tailoring the skills offer to meet the

²¹ [New Anglia LEP Strategic Economic Plan](#)

²² New Anglia LEP Analysis of Cambridge Insights East of England Forecasting Model and contextual narrative in SEP impact report

needs of the local economy, training providers in Norfolk and Suffolk can help to achieve greater levels of private sector investment in skills and ensure that businesses have access to the high level skills necessary for innovation and growth. To achieve the growth ambitions, the priority for skills investment must be in learning provision that is flexible enough to respond to economic need, enables progression, increases productivity and creates specialisms where needed.

Provision should:

- produce a highly-skilled and flexible workforce
- encourage private sector investment
- be strongly aligned to our key growth sectors
- attract and retain the best talent.

The number of jobs requiring a high level of technical and professional skills is rising, especially in science, technology, engineering and mathematics (STEM) related roles within key growth sectors, whilst there also remains a need for high levels of employment in service roles. The learning providers in the area must deliver the skills provision that is needed to provide residents – young people, the current workforce and those not currently economically active – with the capabilities and opportunities to fulfil this demand and progress within such an economy.

To attract talented young people, leading edge technical and professional programmes, including higher level apprenticeships and graduate courses, must be available and supported by employers. These programmes should be aligned to the high level needs of the key sectors and should be part of clear progression pathways within and between academic, technical and professional routes of learning up to higher and degree level.

The LEP sees robust, good quality apprenticeships, especially at advanced, higher level and degree level, as having a key role in aligning quality training with economic need and providing clear entry points and pathways into local industry. This is reflected in the LEP's ambition to create 5,000 additional apprenticeships by 2020 from a 2013/2014 baseline of 12,000.

To support those with special educational needs and disabilities (SEND), those young people who are not in education, employment or training (NEET) or unemployed adults, the local education and skills sector must provide entry routes at all levels and at multiple points during the year. This includes creating clear opportunities and information to allow young people of all abilities to progress into employment but also provision for adults who may need to retrain or gain new capabilities to enable them to succeed. There is a need to build on the adult learning offer to support the needs of the unemployed and ensure that a greater proportion of the adult education budget is used to deliver training which aligns to the needs of Jobcentre Plus and delivers in-work progression. Additionally, young people need to have access to improved and well-coordinated transport arrangements that are responsive to their individual context and circumstances.

Securing a better future for those furthest from the labour market is important to creating a fair and prosperous region and a higher pay, lower welfare society. It is important that as many individuals as are able are supporting the local economy and this means ensuring that everyone is equipped with the necessary skills to secure a job and progress.

In an ever-changing economy where the skills required fluctuate and the notion of 'a job for life' is being replaced with 'portfolio careers', people continually need to learn new skills. Over 80% of the 2020 workforce is already in work, so upskilling the current workforce is therefore critical to future growth and productivity. Employers must therefore be supported and encouraged to co-invest in workforce development and in work progression through tailoring the skills offer to meet their needs. The LEP sees the adult education offer making a key contribution to this objective.

Building on current work to develop sector skills plans, educators and training providers should work alongside employers to develop industry standard provision that is strongly linked to the local economy. This work will need to take into consideration the potential impact of significant developments expected in the coming years. Some of these developments will deliver significant outputs and place unique specialised demands on the local labour market and skills provision. These developments are likely to have significant requirements around highly skilled and technically advanced roles, demands which the current labour market and skills provision are unlikely to be able to fulfil.

Examples of such projects include the proposed Sizewell C nuclear power station which will require skills for both construction and operation of the site. It is expected that 25,000 jobs will be created. At peak the construction, the site workforce would be about 5,600 people with 900 permanent, largely highly skilled jobs required for long-term operation.

Further examples of key developments include the expansion of both Norwich Research Park and Adastral Park in Martlesham, near Ipswich, which could collectively create an additional 3,000 highly skilled, high value jobs in the region while the establishment of the first bespoke facility in Europe to provide a centre for advanced knowledge engineering in data analytics could lead to 4,600 new highly skilled jobs and 1,500 additional construction positions over 3 years.

Feedback from LEPs, employers, local authorities, students and staff

Feedback from LEP representatives, local authority representatives and employers consulted during the area review process drew attention to the need to:

- develop a skills system that is responsive to industry needs, supports innovation, and increases productivity; a key challenge for the region
- build a sustainable, high quality post-16 offer that is stable enough to navigate future funding pressures and population fluctuations

- strengthen the learning pathways for all young people and adults to support and enable progression into work and throughout an individual's career, in particular addressing the gaps in provision that develop entrepreneurial and softer skills, highlighted as important by employers and education for those with SEND
- increase the number of apprenticeship places, with a focus on progression to advanced, higher and degree level learning and to increase the range of high quality engagement provision that is focused on supporting young people who become NEET and progress them into sustainable employment
- develop and expand higher level and technical programmes, both in further and higher education, to provide a more tailored offer to better support growth and productivity gains in key industries and emerging sectors.

The area review was viewed as providing an important reference point for work to commence on the future planning of the Adult Education Budget so that the future offer is focused on learning that delivers sustained job outcomes, productivity and economic growth.

The New Anglia LEP and local authorities should be prepared to support adults in and out of work and ensure that the adult learning offer is aligned to the economic priorities and tackling productivity challenges through a high-performing skills system. Its principal purpose must be to engage adults and provide the skills and learning they need to equip them for work, an apprenticeship or further learning. It should also include tailored programmes of learning which do not need to include a qualification, to help those furthest from learning or the workplace.

Government is seeking to transfer control of the Adult Education Budget (AEB) to local government areas through devolved agreements enabling local areas and colleges and other training organisations to reshape the local adult education provision. Regardless of whether this occurs in Norfolk or Suffolk, adult learning providers will be key partners in building a strong skills system for New Anglia.

A key objective is to use skills provision in order to support people into employment and then to progress. A great deal has already been achieved through, and building on, the Greater Ipswich City Deal to establish a programme of activity linked to the 'New Anglia Youth Pledge' that sets out the commitment that "every young person in Norfolk and Suffolk will get the personal support they need to get an apprenticeship, training, work experience or job within 3 months of leaving education or employment."

This commitment is already being delivered in various ways across Suffolk with examples of delivery in Greater Ipswich and Lowestoft through the MyGo youth employment service, and other examples such as Talent Match delivered by Community Action Suffolk. In Norfolk there is a strong and developing neighbourhood and community based range of youth support delivery including Talent Match and Norwich for Jobs alongside other services

currently available for young people. There will be a need to link such work with the aspirations of the Norwich and Ipswich Opportunity Areas²³ plans as they develop.

Work has also begun to establish a scalable integrated work and health system - initially across Suffolk - that through successful implementation can be expanded across New Anglia. This system would include support into employment for long-term benefits claimants and upskilling of the existing workforce across the health and social care sector and thereby reducing skills gaps and skills shortages through bespoke training. This activity will aim to increase productivity through skills and employment.

Extensive stakeholder engagement work was done alongside this review, in partnership with Norfolk and Suffolk County Councils, with schools, adult learning providers, apprenticeship providers, district councils, employers and other groups and individuals. This information was fed into the review to support options and curriculum discussions, but the output will also be used in collaborative work around key agendas to ensure that there is alignment across the area on skills issues and developments that impact on both colleges and other learning providers. The work with schools has resulted in the development of a Norfolk Sixth Form Working Party, with emerging principles around approaches to post-16 admissions processes; quality improvement; employer engagement; and travel to learn.

For most area reviews the National Union of Students submitted a report on the views of students which was considered by the steering group. Where the NUS submitted a report these are available on [NUS connect](#).

The colleges taking part in the review took primary responsibility for ensuring that their staff and union representatives had an opportunity to provide input throughout the review, which the steering group took into account. The Further Education Commissioner held meetings with staff union representatives prior to some of the steering group meetings to enable them to feed their views into the review.

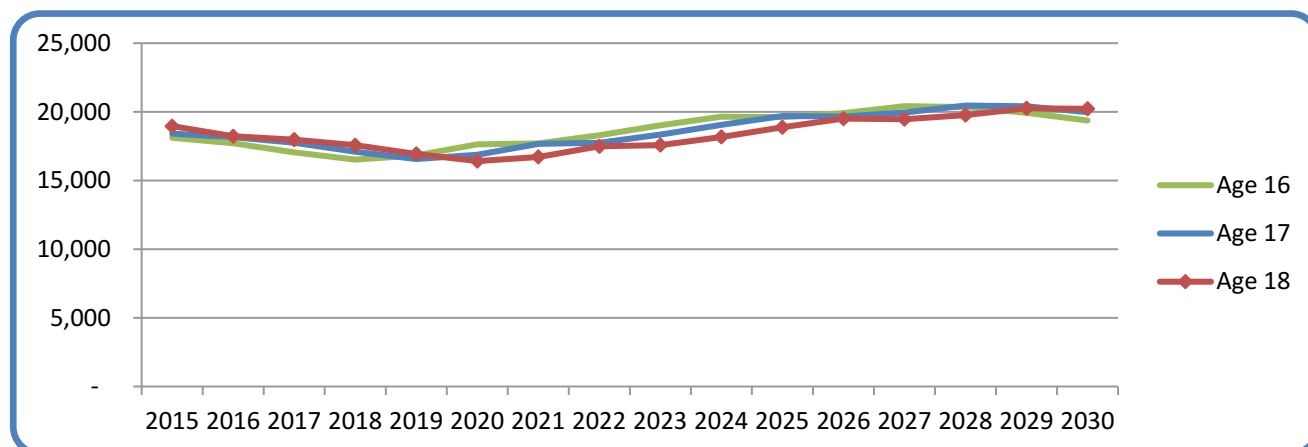
23 Opportunity areas will create local partnerships with early years providers, schools, colleges, universities, businesses, charities and local authorities. DfE opportunity area funding of £72 million will support local education providers and communities to address the biggest challenges in the 12 areas. Norwich was announced as an opportunity area in October 2016 and the addition of Ipswich was announced in January 2017.

The quantity and quality of current provision

The steering group considered information provided by each local authority about population projections, focusing on the changes in the number and needs of young people aged 16+.

In Norfolk and Suffolk, the numbers of young people aged 16 to 18 is still declining and does not start to recover until 2020. Even then, growth in numbers will be slow²⁴.

Population change for 16-18 year olds



There were 54,087 16-18 year olds in the review area in 2016 (28,592 in Norfolk and 25,495 in Suffolk). The age 16-18 cohort is expected to fall by 9.3% between 2015 and 2019, and then increase by 18.4% across the area between 2019 and 2030. However, in learner number terms, this is low and will not have a significant impact on sustainable recruitment in the area post-16. There are also significant variations in the local demographics, with population growth stronger in the Norwich, Ipswich and Forest Heath districts but far slower in Great Yarmouth, Waveney, Kings Lynn, Breckland, Broadland, North Norfolk, Babergh, St Edmundsbury and Suffolk Coast.

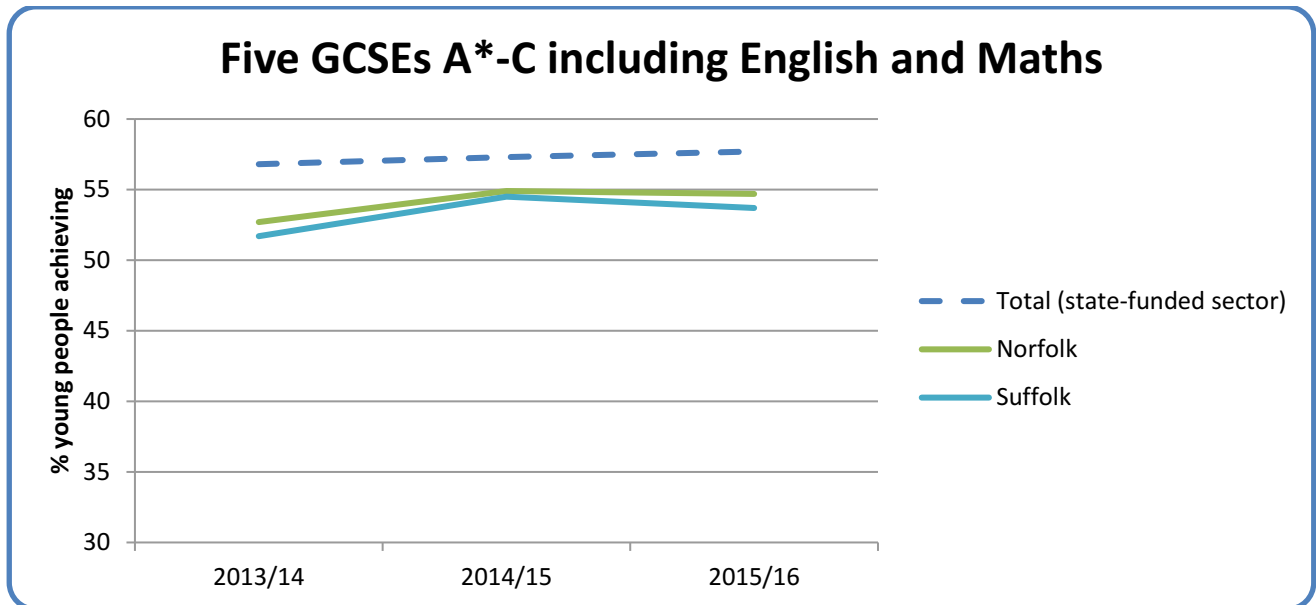
Performance of schools at Key Stage 4

The recent trend in GCSE pass rates for 16 year old school pupils completing year 11 across the 2 local authorities is illustrated on the graph overleaf²⁵.

24 ONS sub-national population projections – see data annex: Population projections

25 School Key Stage 4 results – see data annex. Local authority and total (state-funded sector) figures covering achievements in state-funded schools only.

While results for both counties for those achieving 5 GCSEs including English and maths improved in 2014/15 compared to the previous year, there has been a slight drop in results in 2015/16 and outcomes for both local authority areas remain below the national average²⁶.



While there are individual institutions that have results that compare well with the national averages, this overall level of underperformance is a trend that has been a challenge for a number of years across both Norfolk and Suffolk as published DfE performance data going back to 2009/10 shows²⁷.

Schools with sixth-forms

Area reviews of post-16 education and training institutions are predominantly focused on general further education and sixth-form colleges in order to ensure there is a high quality and financially resilient set of colleges in each area of England. Schools with sixth-forms have the opportunity to seek to opt in to a review if the local steering group agrees.

The underpinning analysis for the review included current post-16 provision in the area delivered by schools with sixth-forms. Regional Schools Commissioners and local authorities have had the opportunity to identify any issues with school sixth-form provision, and feed these into the review. We expect Regional Schools Commissioners to take account of the analysis from area reviews in any decisions they make about future provision.

²⁶ In 2013 to 2014, a change in how the GCSE performance of schools was defined led to a drop in the overall numbers of young people achieving 5 GCSEs A*-C including maths and English.

²⁷ [DfE Performance Tables historic information](#)

There are currently 52 funded schools with sixth-forms in the review area, including 8 local authority maintained schools, 41 academies, 2 free schools and 1 university technical college²⁸. Most school pupils in the age range 16 to 18 are enrolled on A level courses. In addition, there are 10 special schools (one academy, one free school and 8 local authority maintained) with sixth-forms.

Overall funded student numbers in mainstream school sixth-forms declined by 4% (533 places) in the 3 years from 2014 to 2015 to 2016 to 2017 from 13,378 in 2014/15 to a total of 12,845 young people funded in a mainstream sixth-form setting in 2016 to 2017²⁹. School sixth-forms in the area vary in size but, using as a guide, for illustration purposes only, the application threshold of 200 for new school sixth-forms in academies, there are 27 school sixth-forms, comprising 17 in Norfolk and 12 in Suffolk (including local authority maintained and academies but excluding special schools) that were funded below that figure in 2016 to 2017. The majority of schools with sixth-forms were graded by Ofsted as good or better.

The further education and sixth-form colleges

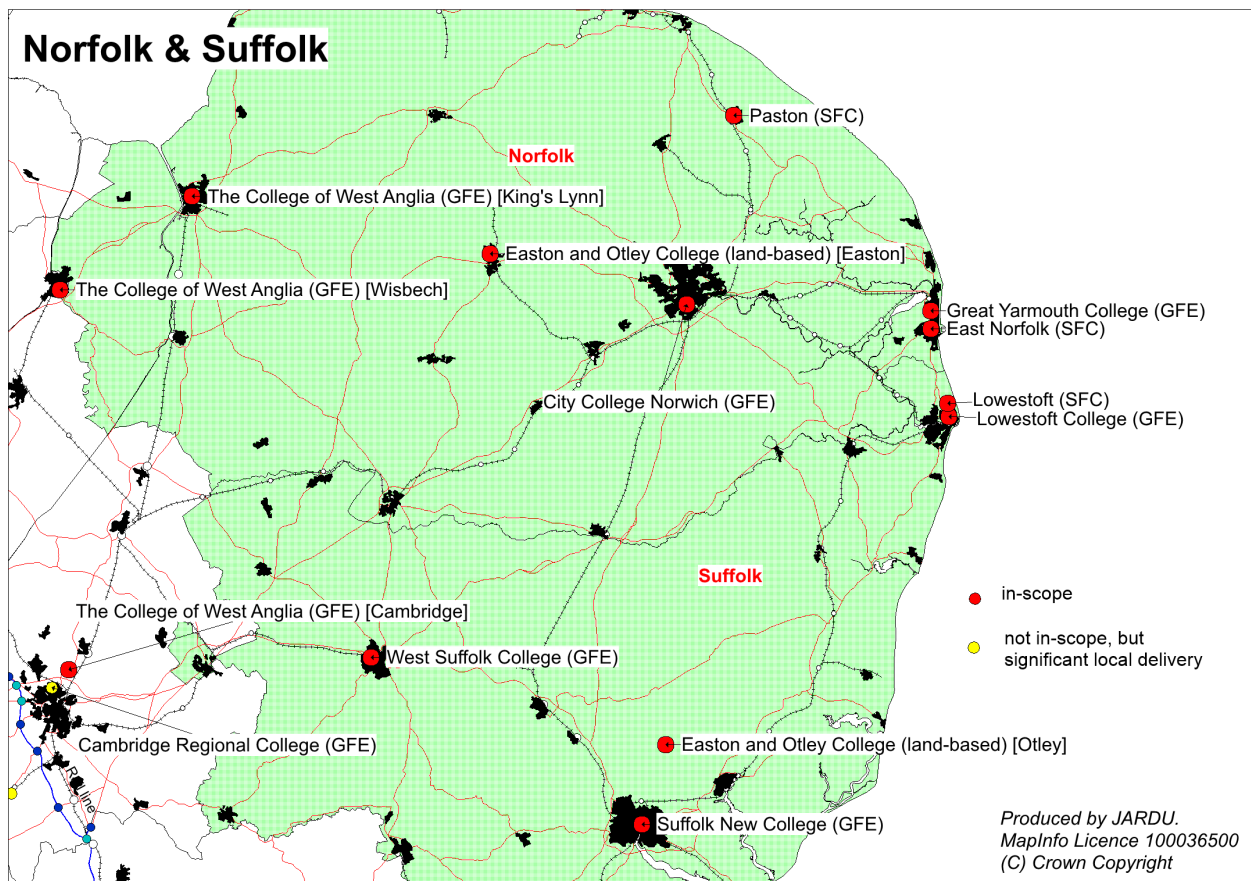
Ten colleges (3 sixth-form colleges, 6 general further education colleges and 1 specialist agricultural college) participated in this review.

- City College Norwich
- East Norfolk Sixth Form College
- Easton and Otley College
- Great Yarmouth College
- Lowestoft College
- Lowestoft Sixth Form College
- Paston Sixth Form College
- Suffolk New College
- The College of West Anglia
- West Suffolk College.

The location of these colleges is shown overleaf:

²⁸ EFA Allocations – see data annex: 16 to 19 funding. Where part of a local authority is in the review area, that local authority has been included in the school sixth-form data.

²⁹ EFA allocations – see data annex: 16 to 19 funding.



Part of the area review process involved a visit to each college by specialist further education and sixth-form college advisers who report to the respective commissioners. The advisers met with governors, senior managers and staff, and reviewed a wide range of documents and data relating to each college’s current range and quality of provision, their track record in attracting students, and their overall financial health. Through a data sharing protocol between members of the steering group, the information from each of these visits was shared with colleges and has informed the evidence base to the steering group for this review.

The current offer in the colleges

Between them, the colleges offer provision in all key areas of the curriculum. There is widespread provision in health and social care, with progression routes through from entry level to higher education. There is also significant academic provision supporting progression to science-based degrees to address the needs of the life sciences sector. This includes an emerging apprenticeships programme. There are specialist facilities at the colleges to support the needs of the energy sector, but this is part of an ongoing development, with the colleges working jointly to develop the provision that will be needed to support the construction of the planned Sizewell C nuclear reactor, and for the wind and offshore oil and gas industries.

Advanced manufacturing is an area where there is significant existing provision, but also ongoing investment, with skills capital from the LEP, to develop industry-standard facilities. There is a wide range of specialist apprenticeships provision delivered by the colleges in the area of advanced manufacturing and engineering, including bespoke learning programmes for employers and provision in specialist areas such as aviation.

Construction is another area where there is strong provision at the general FE colleges. This is being developed further through collaboration with employers to ensure that skills gaps can be addressed and colleges can rationalise provision across the area to ensure they offer a full range of courses across all specialist areas, with good progression routes linked to the LEP skills plan.

There is a good range of general ICT and digital provision, but also some niche specialist provision. This is an area of demand in all employment sectors and where colleges have recognised the need to do more planning to create progression routes to higher level specialist technical skills.

Transport and logistics, while being one of the LEP priorities, is an area where the colleges deliver limited provision because the majority of the needs in the sector are already well-addressed by the specialist private training providers working in this area.

Food, drink and agi-tech are LEP priorities and the colleges delivering provision for this sector have between them 3 campuses delivering specialist land-based and associated provision and are doing significant work supporting the demands of these industries.

There is a significant learning offer for tourism and culture-related programmes across Norfolk and Suffolk. The colleges work with local hotels and businesses in the sector to provide work experience.

There is a broad base of both academic and vocational/technical provision supporting the skills requirements of the finance and insurance sector, and offering business management/administration provision. These are mainly full time college programmes rather than apprenticeships.

Between them the colleges offer an academic A level curriculum, delivered by the three sixth-form colleges, The College of West Anglia and City College Norwich. The sixth-form colleges also deliver BTECs, although the vocational offer is more extensive at Lowestoft and East Norfolk Sixth Form Colleges than at Paston Sixth Form College. East Norfolk Sixth Form College in particular offers significant number of its learners a combined A level/BTEC pathway. It is not yet clear whether this will be possible in the future under the Skills Plan requirements which indicate that students may have to choose *either* an academic or technical learning route.

Quality of provision and financial sustainability of colleges

The following table provides a summary of the size and quality in each of the colleges:

College	Most recent overall Ofsted grade ³⁰	EFA allocations (2016 to 17) ³¹	SFA allocations (2015 to 16) ³²	Total college income 000s (2014 to 2015) ³³
City College Norwich	Grade 2 – Good (February 2013)	£21,227,132	£4,978,963	£38,167
East Norfolk Sixth Form College	Grade 2 – Good (October 2016)	£7,245,018	£2,196	£8,233
Easton and Otley College	Grade 2 - Good (September 2016) ³⁴	£12,642,756	£3,131,222	£22,788
Great Yarmouth College	Grade 2 – Good (October 2013)	£6,341,084	£1,456,073	£12,973
Lowestoft College	Grade 3 – Requires Improvement (April 2016)	£5,125,422	£3,981,283	£14,249
Lowestoft Sixth Form College	Grade 2 – Good (April 2015)	£3,087,397	NIL	£3,163
Paston Sixth Form College	Grade 2 – Good (December 2015)	£2,826,707	NIL	£4,799
Suffolk New College	Grade 3 – Requires Improvement (November 2015)	£11,475,420	£2,489,586	£19,899

30 Ofsted – see data annex: College inspection reports

31 EFA allocations – see data annex: 16 to 19 funding

32 SFA allocations – see data annex: Adult funding

33 College accounts academic year 2014 to 2015 data – see data annex: College accounts

34 Easton and Otley College was inspected by Ofsted in May 2017 shortly after the close of the area review. The report is due to be published at the end of June 2017

College	Most recent overall Ofsted grade ³⁰	EFA allocations (2016 to 17) ³¹	SFA allocations (2015 to 16) ³²	Total college income 000s (2014 to 2015) ³³
The College of West Anglia	Grade 3 – Requires Improvement ³⁵ (January 2017)	£16,872,735	£6,863,450	£33,545
West Suffolk College	Grade 2 – Good (May 2016)	£13,798,153	£6,033,986	£26,023

Where a college was subject to a financial notice of concern or a financial notice to improve this was a factor which was taken into account in the assessment of options for structural change in the review. Great Yarmouth College and Lowestoft College are both subject to a financial notice of concern issued by the Skills Funding Agency.

Overall, the condition of college buildings is good. Colleges report reasonable estates efficiency and running costs, and have plans in place to improve where needed. Some colleges have higher average space per student than others, but this does not necessarily indicate being over-spaced. Each college has unique circumstances and constraints regarding estates. The area review has highlighted some instances where rationalisation or further investment might be considered further during implementation.

Higher education in further education

Progression of young people to higher education³⁶ across Norfolk and Suffolk has been variable but lower than the national average of 32.6%. Data from the Higher Education Funding Council for England (HEFCE) shows that Norfolk has had one of the lowest rates of progression, as 27.4% of young people who reached 18 between 2005-2009 and participated in higher education (HE). Suffolk had a progression rate of 32.4% over the same period.

The University of Suffolk recently published a study³⁷ exploring the issues around low participation in higher education in three areas of Norfolk and Suffolk (Great Yarmouth,

³⁵ The College of West Anglia, which was rated as good previously, was inspected part way through the area review and the report was published in March 2017. The review outcomes were formed taking this into account

³⁶ HEFCE POLAR 3– see data annex: Higher education progression

³⁷ [University of Suffolk: An investigation into the factors determining low participation rates in three areas of Suffolk and Norfolk](#)

Thetford and Ipswich). The purpose was to identify barriers, find out what works in supporting and encouraging progression, and to identify specifically what more can be done to widen participation.

The universities in the area: University of East Anglia, University of Suffolk and the Norwich University of the Creative Arts, offer the majority of higher education in the review area. All 6 of the general FE colleges and the specialist agricultural college deliver some higher education provision, some of which is HEFCE funded and some through arrangements direct with universities; many students are funded through adult loans. Between them the colleges have nearly 1,000 students on access to higher education programmes. The two colleges with the largest number of higher education students and the broadest offer are City College Norwich and West Suffolk College. The majority of the college higher education offer is aligned to the LEP priority sectors.

Provision for students with special educational needs and disability (SEND) and high needs

In 2016 to 2017, the EFA funded 1,011 post-16 places³⁸ across the Norfolk and Suffolk local authority areas in colleges, special schools and specialist post 16 institutions. Colleges delivered 762 funded places between them, plus additional places funded entirely by the local authorities. The colleges delivering the highest numbers of funded places are City College Norwich and The College of West Anglia. The colleges' offer includes a range of specialisms including provision for those learners with profound and multiple learning difficulties through to level 3. There is a focus on getting learners into sustainable employment.

During the review, local authorities outlined a need for a significant number of additional places for high needs learners in the future and asked colleges to consider the type of provision they can develop and offer to support learners that must otherwise travel significant distances outside of the area to access suitable provision. The two local authorities have agreed to review the information on learners coming through the primary and secondary phase to provide a more detailed set of requirements around numbers and particular gaps in provision/specialist support that may be required.

The steering group acknowledged that structural changes taking place as a result of the review should not disadvantage post-16 students with SEND or high needs.

³⁸ EFA Allocations – see data annex: 16 to 19 funding: High needs

Apprenticeships and apprenticeship providers

In 2015 to 2016, 7,670 apprenticeship places were delivered in Norfolk and 6,340 in Suffolk. The general FE colleges and the specialist land based college in the area offered 6,550 apprenticeship framework enrolments between them³⁹.

Overall, the most popular frameworks are business administration, children's care learning and development, customer service, construction skills, health and social care, hospitality and catering, and management.

There are a large number of learning providers delivering apprenticeship frameworks to Norfolk and Suffolk residents, including large national training providers, most of whom are not based in the area and some of whom deliver very small numbers.

Apprenticeships growth⁴⁰ across the New Anglia LEP area varies significantly. In Norfolk, growth has been consistent since 2013/14, and has been mostly at advanced and higher level. In Suffolk, growth was seen in 2014/15 but there was a contraction in places in 2015/16. The New Anglia LEP has a target of 5,000 apprenticeship starts each year by 2019.

The most significant percentage growth in 2014/15 was in higher apprenticeships where, in Norfolk the number of starts tripled and in Suffolk more than doubled when compared with the previous year. Further work is required to ensure that the apprenticeships delivered are those that meet the needs of the sectors with projected growth.

The apprenticeship reforms, most notably the apprenticeship levy, will provide new opportunities to develop apprenticeship pathways, particularly at advanced, higher and degree level. Employers and apprenticeship training providers will be able to work more collaboratively to identify new routes of innovation and growth and to further develop apprenticeships that support entry to employment and in-work progression.

The current pattern of delivery may change from 2017, with the introduction of the apprenticeship levy⁴¹ and the apprenticeships reforms.

Competition

There has been a growth in the number of post-16 places in Norwich in the past 5 years with the opening of two new free schools and a university technical college. This has created additional places in the system and increased competition for places at a time of demographic decline. Existing schools and colleges in North Norfolk have been impacted by

³⁹ Numbers of apprenticeships by provider and LA – see data annex: Apprenticeships

⁴⁰ Numbers of apprenticeships by provider and LA – see data annex: Apprenticeships

⁴¹ ['Apprenticeship levy and how it will work'](#) on gov.uk

the opening of the new institutions. A new school sixth-form is due to open in Great Yarmouth in 2020 and there has been a recent application for another to open in 2017/18 in Lowestoft. These two towns are in an area where the age 16-18 cohort decline continues for some time and does not recover significantly, so competition for post-16 learners in the area will continue to increase.

Land based provision

Landex, the sector organisation that represents a significant number of colleges which deliver land based provision, has prepared a report for steering groups on the mix and balance of land based provision across the country, the key deliverers of this and the importance of that provision to the sector and the economic development of the country.

The strategic importance of the industry environmentally to food and water security in the future is set out. The land based and agri-tech industries have an ageing workforce and an increasing need for workers who can apply scientific and technological skills in a land based environment. And, while agriculture and land based engineering have relatively small provider bases compared to their significance to the industries they serve, there may be risk with loss of provision in either area.

Nationally, apprenticeships in the land based sector have been slow to grow and there is a low rate of progression to level 4 and above among students who go into employment in the sector after completing a level 2 or level 3 programme.

Easton and Otley College has a land-based college campus south east of Norwich and another to the north east of Ipswich. The largest sectors of land based provision offered by the college are in animal care, horticulture and floristry and agriculture, with significant numbers in all three for classroom-based technical courses. While the college offers apprenticeships also, the numbers here are lower, following the national pattern. The College of West Anglia also has a land-based campus near Cambridge where the focus is on animal care and veterinary science with some agriculture provision offered. The two colleges have recognised the need to increase the number of apprenticeships they deliver between them. They will be working to ensure better alignment of specialist qualifications to address the skills gaps in the area. They also wish to increase the visibility and profile of land-based careers across the breadth of vocational areas that make up the needs of employers in the sector. West Suffolk College and Great Yarmouth College offer courses in small animal care.

The need for change

Area reviews are intended to ensure that the further education sector has a strong and sustainable future – in terms of efficiency of operation, quality of provision, and the responsiveness of courses to the needs of individuals and employers.

The key areas for change

The key issues in relation to this review, and deliberated during steering group meetings, were the need to:

- ensure a high quality, sustainable post-16 learning offer across the area that provides pathways to higher level professional and technical skills to support growth in key employment sectors and large local projects
- increase the delivery of apprenticeships, especially at higher levels
- develop greater specialisation in high level technical skills to meet employer demand
- build excellence in English and maths teaching
- develop study programmes with robust experience in the workplace
- develop flexible and responsive provision that can better meet learner and employer needs and ensure universal access to learning for students of all ages
- provide more high quality opportunities for learners with SEND locally to prepare for and enter sustainable employment
- develop programmes that will support adults into work, especially in areas aligned to economic priorities
- secure a sustainable future for the two sixth-form colleges in the area that have been significantly impacted by demographic decline.

Initial options raised during visits to colleges

During their visits, advisers reported that all colleges had given considerable thought to potential strategic options in advance of the review. In some cases, this meant informal discussions with neighbouring colleges and stakeholders to canvas views and to assess the potential level of support for change.

The types of options discussed at the visits, in the steering group and workshops and in New Anglia College Group meetings were:

- formal structural change in cases where cohort decline has made a stand-alone position difficult to sustain. This was particularly the case for the two small sixth-form colleges: Paston Sixth Form College and Lowestoft Sixth Form College
- opportunities for colleges within easy travel range of each other to collaborate in areas where provision currently overlaps to ensure best use of specialist facilities and

that there is a broad range of programmes available that provide progression routes to higher level technical skills in priority areas

- discussion between colleges about the case for specialisation, while recognising the travel to learn patterns in such a rural area. There was a particular focus on provision to meet the needs of the land-based employment sector and how a broader range of high level programmes for specialist ICT and digital areas could be provided through exploring a hub and spoke model
- discussions on how best to meet the need to increase the delivery of apprenticeships across the area, and particularly the availability and take-up of higher and degree level apprenticeships to meet the needs of employers for higher level technical skills. Better collaborative working between the colleges and partnership with the higher education institutions (HEIs) was discussed, and there is an expectation of greater employer engagement through the apprenticeship levy
- how the New Anglia College Group might work collaboratively with the local authorities and adult learning providers to ensure that there is a coherent offer across the two counties that provides good progression routes for all
- discussions on the best ways to expand SEND provision locally to meet anticipated needs, and to provide specialist programmes/facilities with a focus on the transition to sustainable work through, for example, supported internships. The New Anglia College Group will continue to work on this with the two local authorities
- how the colleges might work collaboratively to look at different approaches to support the delivery of English and maths and the sharing of best practice
- development of suitable programmes for those young people not in education employment or training (NEET) that will ensure they are able to progress to higher level learning
- how colleges might work collaboratively to provide meaningful and impactful work experience and placements for academic students as well as those on vocational or technical programmes
- whether there is the potential to offer more outreach programmes in areas such as North Norfolk to support learners in areas where there is poor access to vocational learning or to work jointly where delivery of subjects such as modern foreign languages and music is at risk due to low numbers in individual schools and colleges
- the potential for the colleges to collaborate to develop a proposal for an Institute of Technology (IoT) in the area. A number of the colleges were keen to engage in this and areas of potential focus include STEM-based subjects such as engineering, energy and maritime and agri-tech
- the case for remaining stand-alone where colleges have a robust financial position and sufficient critical mass in the student body and travel to learn patterns confirm this is the best solution
- conversion to an academy. This option is available to sixth-form colleges. By becoming an academy, a college is able to develop partnerships more easily with other schools in the area. In order to be approved, academisation proposals must demonstrate how they will lead to strong links with schools, whether through joining

or establishing a multi-academy trust (with other academies) or as a single academy trust collaborating with other schools in the area. Like other academies, sixth-form colleges that become academies would be eligible to receive reimbursement of their non-business VAT and would be classified as public sector bodies. East Norfolk Sixth Form College expressed interest in exploring academisation.

Criteria for evaluating options and use of sector benchmarks

Assessment criteria

In each area review, 4 nationally-agreed criteria are used for the process of assessment. These are:

- meets the needs of current and future students and employers
- is feasible and generates financial sustainability
- raises quality and relevance of provision, including better outcomes
- achieves appropriate specialisation

FE sector benchmarks

To support rigorous assessment of proposals, particularly options leading to major structural change, DfE have developed a series of sector 'quality and financial indicators and related criteria'.

Financial benchmarks relate to delivering operating surpluses of 3% to 5%, ensuring borrowings stay below 40% of annual income (the maximum threshold set for affordability), staff costs of no more than 65% of total income (FE sector average) and a current ratio greater than 1. Financial plans were assessed for each option, including colleges seeking to stand-alone, prior to consideration by the local steering group.

A number of other indicators are also taken into account by the steering group. These relate to the impact of proposed changes on quality of provision, on teaching efficiency, and how they actively support growth in apprenticeships and work at levels 4 and 5. Within proposals, overall levels of provision for high needs students should be maintained. New strategic plans need to be supported by LEPs and local authorities. Colleges may also need to review their senior staffing and their governance to ensure that they have the required skills, and the capacity to implement rapid change.

The assessment of options indicated that, based on the information available to the area review steering group, the colleges would move towards the benchmarks and indicators through successful implementation of options, and that the protected characteristics groups, including high needs students, would retain at least equal access to learning.

More detail about these benchmarks is contained in area review guidance Annex F⁴² (revised March 2016).

⁴² [Reviewing post-16 education and training institutions: updated guidance on area reviews Annex F, Pages 49-53](#)

Recommendations agreed by the steering group

Twelve recommendations were agreed by the steering group at their meeting in March 2017. These were:

- College of West Anglia to remain as a stand-alone college, focusing on rapid quality improvement across all campuses.
- A merger between City College Norwich and Paston Sixth Form College by December 2017 to ensure the continuation of a broad learning offer in North Norfolk to meet local needs.
- The planned merger between Great Yarmouth College and Lowestoft College to be completed in 2017 to form East Coast College, with Lowestoft Sixth Form College joining the merged college in 2018. The new college should work collaboratively with East Norfolk Sixth Form College to ensure that a coherent offer with progression routes to higher level technical and professional learning is made available to all local students across Lowestoft and Great Yarmouth.
- East Norfolk Sixth Form College to explore academisation or remain as a stand-alone sixth-form college, making a decision by September 2017. They should work collaboratively with East Coast College to ensure that a coherent offer with progression routes to higher level technical and professional learning is available to all local students.
- Easton and Otley College to remain as a stand-alone college, developing the land-based specialist offer to meet the needs of learners and employers and working on reducing costs to meet benchmarks and develop greater financial resilience.
- Suffolk New College to remain as a stand-alone general FE college, focusing on quality improvement and further developing the curriculum offer to meet the needs of learners and employers.
- West Suffolk College to remain as a stand-alone general FE college, focusing on the continued development of the offer to meet the needs of learners and employers. The college will further develop the Suffolk Academy Trust through work with local schools to establish a 16-19 free school, providing a coherent, high quality A level offer for learners in West Suffolk.
- Norfolk and Suffolk County Councils to provide colleges with information on the needs of SEND students in the future to support planning of new provision to meet the specialist needs of learners.
- New Anglia Colleges Group to continue to work collaboratively to develop the higher education, adult and SEND offer across the area to provide coherent pathways and routes into sustainable employment for adults and those with additional needs.
- New Anglia LEP, Norfolk and Suffolk County Councils and the colleges to explore options to plan and publicise travel arrangements that will support the development and delivery of curriculum in priority areas, the interests of efficiency and the best possible service for students.

- Norfolk and Suffolk County Councils and the New Anglia LEP to work collaboratively to:
 - develop good quality information on local employment, skills needs and key developments that may provide opportunities for learners
 - publish widely including to schools, colleges and other learning providers to support the provision of improved Information, Advice and Guidance to learners
 - work with stakeholders to develop mechanisms to drive student ambitions to access higher level learning opportunities
- The New Anglia LEP, Norfolk County Council and Suffolk County Council to work with colleges to oversee the implementation of area review recommendations and continued curriculum development to meet the needs of the local economy.

Each of these options is now outlined in more detail:

The College of West Anglia

College of West Anglia to remain as a stand-alone college, focusing on rapid quality improvement across all campuses.

- in terms of meeting current and future needs the college delivers provision in all 15 subject sector areas and at all levels from entry level to higher education, and already has significant apprenticeship and higher education delivery. The college has a large presence in Fenland (campuses in Cambridge and Wisbech), so serves a broad rural area and will be working with the colleges, LEP and local authorities in the Greater Cambridgeshire and Greater Peterborough area to develop a coherent offer for GCGP residents (especially in the Fenland area). The college will explore links with the iMET Centre aligned to specialisms at its Wisbech and Milton Campuses. The college has plans to build higher education (HE) at its new university centre and has set itself a target around increasing apprenticeships delivery (especially at higher levels) in priority areas such as engineering, manufacturing and construction. There are also plans to extend the college's technology strengths into energy and utilities, food and drink manufacturing and low carbon construction
- with regard to financial sustainability, the college has a relatively strong balance sheet and already meets all key financial benchmarks, apart from that for the operating surplus, and has good reserves. It will need to reduce costs and develop efficiencies further to ensure this picture continues and it can meet all benchmarks in the future, especially as it recruits across an area with a continuing decline in the 16-18 cohort. The assessment of 'stand-alone' college options resulting from an area review assumes both financial sustainability and that colleges will achieve and maintain a quality grade of 'good' or 'outstanding'. Where income projections are not realised by the college there will be a risk that the financial health and sustainability may decline

- in respect of quality of provision, the college has received a recent requires improvement Ofsted rating. The college has put an action plan in place to address the weaknesses identified, to tackle challenges around the delivery of English and maths, and to ensure greater consistency of good outcomes for students across all campuses and programme areas
- the college has a specialist land-based campus in Milton near Cambridge, offering learning that reflects the regional priority of agriculture.

City College Norwich and Paston Sixth Form College

A merger between City College Norwich and Paston Sixth Form College by December 2017 to ensure the continuation of a broad learning offer in North Norfolk to meet local needs.

- while City College Norwich currently provides a broad academic and vocational/technical offer in key priority areas to level 6 with an emphasis on STEM, Paston Sixth Form College offers a mainly academic A level curriculum
- in terms of meeting current and future needs, the merger will ensure that an enhanced learning offer can be provided across North Norfolk, including vocational learning that is not currently available from the Paston site. The merged college will be able to offer programmes specifically tailored to the government's Skills Plan across two campuses, providing a transition programme for those learners in North Norfolk that are not currently accessing learning. The plans to broaden the offer and create a more flexible delivery model should attract a greater critical mass of learners to the Paston College North Walsham site, possibly linked with the proposed LEP-funded STEM Centre being developed in the town, to ensure a sustainable offer can be maintained in this rural area
- the college will work collaboratively with Easton and Otley College to develop a higher education centre offering higher level programmes in agri-tech, construction, engineering and health sciences
- with regard to financial sustainability, City College Norwich is a strong college with good financial resilience and good reserves and its financial plans are forecast already meet all of the key benchmarks apart from the one for operating surplus, which it would meet by 2020. By contrast, although it currently has a relatively strong balance sheet, Paston Sixth Form College does not meet the benchmarks around operating surplus or staff costs, which are well above the benchmark. The college is not sustainable as a stand-alone institution and needs a merger partner. A review of the initial financial plans for merger indicate that, post-merger the college will be a financially strong institution that will meet all of the key financial benchmarks by 2020
- in respect of quality of provision, both City College Norwich and Paston Sixth Form College currently have a good Ofsted rating and the merger will enable greater sharing of good practice, alignment of teaching and learning and student review and support systems to deliver continued good quality learning and outcomes

- Specialisms for the merged college will include a high quality academic and vocational offer, with significant provision in STEM-based subjects.

Great Yarmouth College, Lowestoft College and Lowestoft Sixth Form College

The planned merger between Great Yarmouth College and Lowestoft College to be completed in 2017 to form East Coast College, with Lowestoft SFC joining the merged college in 2018. The new college should work collaboratively with East Norfolk Sixth Form College to ensure that a coherent offer with progression routes to higher level technical and professional learning is made available to all local students across Lowestoft and Great Yarmouth.

- in terms of meeting current and future needs, this merger brings together three colleges that were previously competing in an area where there is a declining cohort aged 16-18, to form a strong single institution. The merged college will be able to offer a wider, more relevant range of academic and technical and professional opportunities to meet the needs of age 16–18 school leavers locally, adults, higher education students and the business community across the two towns
- the addition of the sixth-form college to the GFE merger provides a strong basis for STEM development, building a high quality offer and planning progression routes to higher level skills. Post-merger, East Coast College will provide a programme that covers the technical, academic and transition routes described in the government's Skills Plan whilst retaining a sixth-form college ethos at the Lowestoft Sixth Form College campus. The college will need to work with East Norfolk Sixth Form College to develop greater coherence of provision rather than competition, and to provide progression routes to students wanting to progress through higher level technical routes after A levels
- with regard to financial sustainability, while all three colleges have experienced a decline in their financial position due to the demographic decline and local competition, the merger will enable a significant restructure of provision, structures and systems to reduce costs and support development and growth. The two FE colleges currently have poor solvency and do not meet benchmarks on staff costs. The sixth-form college financial plan currently fails to meet 4 of the 5 benchmarks. The colleges are currently working on developing a plan requiring support from the restructuring facility to support the merger of the Lowestoft and Great Yarmouth FE colleges and the next phase of the merger process will take into account the financial planning for the second merger.
- in respect of quality of provision, Great Yarmouth College and Lowestoft Sixth Form College both have good Ofsted ratings. While Lowestoft College had a requires improvement rating at last inspection, there are plans in place to address the identified weaknesses. The merger will support the development of better quality systems and processes, as well as management, across the campuses, and include

effective practice-sharing and more coordinated and improved information advice and guidance. Particular attention will be paid to sequencing the two mergers and integrating systems to avoid any risk of negative impact on learners.

- the two FE colleges already have significant specialisms in energy and offshore oil and gas, ports and logistics and in engineering and manufacturing, with the LEP committed to funding a new engineering facility and supporting the development of a national centre of excellence for skills and training for the energy and maritime sectors. This will be enhanced through the merger and the addition of the sixth-form college will provide a significant strengthening of the STEM-related provision

East Norfolk Sixth Form College

East Norfolk Sixth Form College to explore academisation or remain as a stand-alone sixth-form college, making a decision by September 2017. They should work collaboratively with East Coast College to ensure that a coherent offer with progression routes to higher level technical and professional learning is available to all local students.

- in terms of meeting current and future needs the college plans to continue delivery of a mixed A level/BTEC offer to students aged 16-18, together with some level 1 and 2 programmes to support progression in Great Yarmouth and the surrounding area. The college will review its offer of a mixed A level/BTEC programme in the light of the government Skills Plan. The college will work with the new East Coast College to develop greater coherence of provision rather than competition and provide progression routes to students wanting to progress through higher level technical routes after A levels.
- with regard to financial sustainability, the college is in a stable position currently and meets 3 of the 5 key financial benchmarks by 2017/18, but the age 16-18 demographic is still in decline in the area and the college will have to deliver cost savings in order to meet the operating surplus and staff costs benchmarks. An academisation proposal will require a revised financial plan and clarity on how savings will be made to achieve longer term financial resilience
- in respect of quality of provision, the college received a good Ofsted rating at its recent inspection
- while the college has a preference for a Single Academy Trust (SAT) model if they academise, they will need to provide a strong educational case to demonstrate the degree to which they can bring added value to the local area through partnership working with schools.

Easton and Otley College

Easton and Otley College to remain as a stand-alone college, developing the land-based specialist offer to meet the needs of learners and employers and working on reducing costs to meet benchmarks and develop greater financial resilience.

- in terms of meeting current and future needs, this is a specialist agricultural college focused on delivering vocational/technical provision to meet the needs of the land-based sector across the area
- with regard to financial sustainability, while the college has a strong balance sheet and meets the majority of the financial benchmarks, it does not currently meet the operating performance benchmark, and has a staffing costs that are higher than most specialist agricultural colleges. The college will need to make significant cost savings to ensure that it is able to meet all of the benchmarks in the future. The assessment of 'stand-alone' college options resulting from an area review assumes both financial sustainability and an assumption that colleges achieve and maintain a quality grade of 'good' or 'outstanding'. Where income projections are not realised by the college there will be a risk that the financial health and sustainability may decline
- in respect of quality of provision, the college has a good Ofsted rating, but is aware that it has work to do to improve consistency of quality across all areas and to improve outcomes for learners⁴³
- the college's specialisms, delivered from both its Norfolk and Suffolk campuses, include agri-tech, agriculture and food and drink manufacturing. The college is developing new agri-tech provision to meet regional priorities and to enhance provision at higher levels, working with a university
- the college will collaborate with City College Norwich, which is close to the Easton campus to develop an HE centre focused on higher level programmes in agri-tech, construction, engineering and health sciences. It will also work with Suffolk New College, which is close to the Otley Campus, to explore the potential for collaboration around construction (related particularly to the planned Sizewell C developments), sport and other curriculum areas.

Suffolk New College

Suffolk New College to remain as a stand-alone general FE college, focusing on quality improvement and further developing the curriculum offer to meet the needs of learners and employers.

- in terms of meeting current and future needs the college delivers provision in areas that meet local priorities but plans to grow its employer-facing provision and higher education offer significantly. The college will invest in outreach provision in coastal Suffolk, to provide local access to a broad vocational offer from September 2017. It will also focus on collaboration with the other Suffolk colleges to provide an offer,

⁴³ Easton and Otley College was inspected by Ofsted in May 2017, shortly after the close of the area review. The report is due to be published at the end of June 2017

particularly in construction and engineering, to support the requirements of the planned Sizewell C development on the Suffolk coast

- with regard to financial sustainability, the college has a strong balance sheet, but does not yet meet all key financial benchmarks. Current plans show the college's borrowings and staff costs are above the benchmark and the operating position is below the benchmark. It is forecasting that it will move towards meeting all by 2020, with forecasts that depend on considerable income growth in a number of areas. The assessment of 'stand-alone' college options resulting from an area review assumes both financial sustainability and an assumption that colleges achieve and maintain a quality grade of 'good' or 'outstanding'. Where income projections are not realised by the college there will be a risk that the financial health and sustainability may decline
- in respect of quality of provision, the college currently has a requires improvement Ofsted rating. Plans are in place, and being delivered and monitored, to bring about improvement and develop greater consistency in outcomes across all college programmes by the time they are re-inspected
- the college's specialisms include construction and engineering to support the energy sector. The college has plans to work collaboratively with Easton and Otley college to develop provision that will support this sector.

West Suffolk College

West Suffolk College to remain as a stand-alone general FE college, focusing on the continued development of the offer to meet the needs of learners and employers. The college will further develop the Suffolk Academy Trust through work with local schools to establish a 16-19 free school, providing a coherent, high quality A level offer for learners in West Suffolk.

- in terms of meeting current and future needs, the college will continue to offer a broad curriculum that aligns with key priority sectors. It will also continue to offer provision through its outreach centres, which provide access to learning for those in rural areas, including across the Cambridgeshire border. The college is a significant provider of apprenticeships in LEP priority areas, with plans to scale up delivery, especially higher and degree level apprenticeship programmes, to meet employer needs. It also has a significant and growing higher education offer in priority areas
- the college is working with local schools to support and sponsor the development of a post-16 free school in Bury St Edmunds that will bring together the resources of several small school sixth-forms to create a larger, sustainable and high quality A-level offer for West Suffolk students. This will open in 2018/19. Additionally, the college continues to sponsor Suffolk One, a 16-19 centre in Ipswich, as part of its Suffolk Academy Trust, and to work closely with the Specialist SENDAT Trust, which offers post-16 provision to those learners with SEND

- with regard to financial sustainability the college is in a strong position and assessment of financial plans demonstrates that the college already meets all of the benchmarks apart from the staff costs ratio It forecasts that it will meet this in 2017/18 due to growth in income and indications are that the college will continue to be in a strong financial position for the foreseeable future
- in respect of quality of provision, the college has a recent good Ofsted rating with ambitions to achieve outstanding. Practice-sharing with Suffolk One, which has an outstanding Ofsted rating, will support this ambition and the college is aware of the need to improve outcomes in maths attainment
- the college has specialisms in LEP priority areas including engineering at level 3, 4 and 5 and HNC/HND/foundation degree offer in STEM-related areas.

Planning SEND Provision

Norfolk and Suffolk County Councils to provide colleges with information on the needs of SEND students in the future to support planning of new provision to meet the specialist needs of learners.

- the two local authorities will review current systems for commissioning SEND provision in order to align practice across the review area as far as this is possible, and to identify and specify the particular needs for the future
- this will enable colleges and other providers to work more closely with the local authorities to cost, develop and establish suitable provision that meets the needs of learners and their families
- the colleges and local authorities will establish a working group both in Suffolk and Norfolk to take forward planning work during 2017.

New Anglia Colleges Group Collaborative Working

New Anglia Colleges Group (NACG) to continue to work collaboratively to develop the higher education, adult and SEND offer across the area to provide coherent pathways and routes into sustainable employment for adults and those with additional needs.

- the colleges have already started work to map provision across the area to ensure that there will be progression routes to higher level technical and professional programmes that will meet the needs of local employers. They will extend this so that they are able to provide this map for learners
- discussions will take into account the need to plan for the implementation of the government Skills Plan and the requirements around work experience placements
- they have also started to consider the need to ensure a coherent offer in higher education and will work with other adult learning providers across the area to develop an offer across Norfolk and Suffolk that will allow adults to access provision that will upskill them so they can progress in their careers

- most of the colleges have a significant offer for learners with additional needs and they are keen to work with the local authorities to consider how they can extend this to meet the needs identified for the future, including by participating in the local authorities' new working group mentioned above
- the colleges' developments will engage with the local authorities and LEP to ensure alignment of plans with local needs and priorities
- NACG will develop an action plan that will support the colleges in implementing agreed changes that are agreed from the conversations.

Planning Post-16 Travel

New Anglia LEP, Norfolk and Suffolk County Councils and the colleges to explore options to plan and publicise travel arrangements that will support the development and delivery of curriculum in priority areas, the interests of efficiency and the best possible service for students.

- both local authorities are currently looking at the travel arrangements for post-16 students and, while their commitment to continued support for post-16 travel is high, this was recognised as an area where local authority resources will face significant challenge
- the local authorities will work with the colleges and other providers to ensure that any changes that are made to current systems and transport arrangements reflect the development and delivery of provision and progression routes for learners that will support economic needs.

Improving Information, Advice and Guidance to Students

Norfolk and Suffolk County Councils and the New Anglia LEP to work collaboratively to:

- develop good quality information on local employment, skills needs and key developments that may provide opportunities for learners to progress
- publish this widely including to schools, colleges and other learning providers to support the availability of improved careers education, information, advice and guidance (CEIAG) to learners
- work with stakeholders (schools, colleges, HEIs and other learning providers) to develop mechanisms to drive student ambitions to access higher level learning opportunities.

Implementation

The New Anglia LEP, Norfolk County Council and Suffolk County Council to work with colleges to oversee the implementation of area review recommendations and continued curriculum development to meet the needs of the local economy.

- this work will be delivered through the current New Anglia LEP Skills Board and a representative from the funding agency will be invited to attend to ensure that local work with colleges is aligned to the formal implementation monitoring and support that the agency will be undertaking with colleges to deliver the area review recommendations.

Conclusions from this review

The purpose of area reviews is to put colleges on a stronger financial footing whilst also enabling them to better meet the economic and educational needs of students and employers for the long term.

Throughout the review, colleges have worked closely with their LEP, local authorities and the review team, sharing detailed information about their performance and processes. Each local steering group member has been in a position to offer ideas for change, and make comments and assessments about others' proposals and plans for their area. The review team is grateful for the positive approach taken by all the local stakeholders involved in the review.

The issues arising from the area review, summarised in 'The need for change', will be addressed through the following outcomes:

- the merger of Paston Sixth Form College with City College Norwich will ensure that provision can be maintained and enhanced in North Norfolk and that a sustainable offer can be retained in North Walsham at the Paston campus
- the inclusion of Lowestoft Sixth Form College in the planned merger between Great Yarmouth College and Lowestoft Colleges will build greater financial resilience, reduce competition and support the development of a broader, more relevant academic and vocational/technical offer for the area with a strong STEM focus
- the planned development of a 16-19 free school centre in West Suffolk, supported by the West Suffolk College, will combine the strengths of a number of small school sixth-forms to provide a high quality and sustainable academic offer to students in the area
- continued plans by the colleges to manage costs down and to develop greater efficiencies will support their longer term financial resilience
- there will be continued collaborative working by the colleges on the development and implementation of clear specialist technical routes to meet the requirements of the government's Skills Plan
- collaborative planning of provision between colleges where there is overlap in a travel to learn area, large procurement opportunities or where there are major projects (such as the Sizewell C development) that require a broad and coordinated response that cannot be achieved by any single college. This will ensure that resources and facilities can be used more effectively to provide a broad base of provision with progression routes to higher level technical and professional learning in priority areas
- collaborative working between New Anglia colleges in meeting the specialist apprenticeship needs of public sector employers who will be paying the levy as well as developing sector-based work academies and traineeships for adults that will meet the needs of SMEs
- the New Anglia colleges growing their delivery of higher and degree level apprenticeships. They have set a target for 15% of apprenticeships delivered to

Norfolk and Suffolk residents to be at higher levels, with 5% at degree level by 2018/19

- developing more targeted provision for learners with SEND to meet the needs outlined by the local authorities (in terms of specialisms, geographic demand and increasing numbers) and by providing progression to supported work placements, leading to sustainable employment
- collaborative working between the New Anglia colleges, the local authority adult learning services and other adult learning providers in the area to ensure that there is a better and more coherent offer for adults that provides the progression routes necessary to support them into sustainable work and for development of higher level skills
- better working with Job Centre Plus to determine what has been most effective in the Work Programme so that this can be replicated in the delivery of programmes to increase the progression into sustainable work for adult students
- the collaborative working of the colleges through New Anglia Colleges Group which aims to deliver: better and more relevant work experience for those students on academic programmes; improvement in English and maths outcomes; sustainability for minority subjects; and progression mapping to support the provision of better information to learners
- the development of a collaborative proposal (or proposals) for an Institute of Technology (IoT) that will meet the priority needs of the New Anglia LEP area, particularly in key sectors, including engineering
- collaborative working between local authorities and providers across the review area on the development of post-16 transport policy
- the development of relevant and targeted information by the LEP to improve the provision of effective information advice and guidance to all learners across the area and support access and progression
- the New Anglia LEP Skills Board to provide oversight, scrutiny and support for the local implementation of the area review recommendations.

The New Anglia LEP has committed to ensuring that any skills capital funding is targeted towards supporting the implementation of the area review recommendations and development of pathways to higher level skills, and is highly supportive of the potential for developing an IoT in the area.

Next steps

The agreed recommendations will now be taken forward through recognised structural change processes, including due diligence and consultation.

Proposals for merger, sixth-form college conversion to academies, or ministerial approval, for example of a change in name, will now need intensive work by all parties involved to realise the benefits identified. Colleges will want to give consideration to making timely applications for support from the [Restructuring Facility](#), where they can demonstrate that the changes cannot be funded through other sources. Colleges exploring academy conversion will be subject to the application process and agreement by the Sixth Form College Commissioner and the Regional Schools Commissioner.

Primary responsibility for implementation of recommendations relating to individual colleges rests with those institutions. However, it will be important to understand how progress is going in the round in each area and each set of area review recommendations will be formally monitored at both national and local levels. As the [guidance](#) produced for LEPs and local authorities sets out all those involved in the local steering group will be expected to play their full part in ensuring that changes happen within the timescale agreed. In this context, LEPs and local authorities are expected to retain their focus on driving changes, and assessing how implementation of recommendations is contributing to local economic performance. The EFA and SFA, with oversight from the Further Education Commissioner and Sixth Form College Commissioner, will also be monitoring progress across all areas.

A national evaluation of the area review process will be undertaken to assess the benefits brought about through implementation of options. It will include quantitative measures relating to the economy, to educational performance, to progression, to other measures of quality, and to financial sustainability. This analysis will also take account of the views of colleges, local authorities, LEPs, students and employers about how well colleges are responding to the challenges of helping address local skills gaps and shortages, and the education and training needs of individuals.



Department
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Reference: DFE-00222-2017



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