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Introduction

1.1 The purpose of this document is to consider the potential pupil impact on pupil numbers as a result of housing growth within County Durham and the resulting additional school places required as a result of future development.

1.2 The report is not intended to address wider education matters relating to school organisation which is a matter for the School Places and Admissions Team in Children and Adults Services.

Background

2.1 The [Sustainable Communities Strategy](#) and [Regeneration Statement](#) sets out where the County aims to be in 2030, which includes having a thriving economy and bridging the gap between its economic performance and that of other parts of the North East and the rest of England. The County will be a top location for business, capitalising on its strategic location in relation to road, rail and air transportation and a distinctive multi-centred settlement pattern will comprise sustainable and regenerated communities.

2.2 To meet the vision for sustainable communities it is essential that residents can live close to employment opportunities and have access to local facilities. Where possible, new residential development should help support schools, including those where pupil numbers have fallen, plan for use of surplus capacity and where necessary contribute towards additional provision. Education provision is critical to ensuring this vision is achieved. Where there is insufficient capacity to meet the demands from a new housing proposal, it is critical that the developers engage with the local education authority through the Development Management process to ensure that additional provision can be secured.

Education Provision - The National Picture (England)^(a)

3.1 The Office for National Statistics (ONS) has produced an overview of key findings from its analysis of pupil numbers using the 2014 School Census information. This represents the national picture and 'broadly' reflects the situation in County Durham.

3.2 Key Points:

- Overall pupil numbers (aged up to and including 15) in state-funded schools began to increase in 2011 and are projected to continue rising, although the numbers in primary and secondary schools will obviously peak at different stages in the next 15 years;
- Numbers in maintained nursery and state-funded primary schools started increasing in 2010 and are expected to continue rising. Between 2013 and 2017, numbers are projected to increase by 8%; and
- State-funded secondary school rolls of pupils aged up to and including 15 have been in decline since 2004 and are expected to decline further until around 2015 when numbers in secondary schools will be about 3% lower than in 2012. Increases in primary pupil numbers will start to flow through at this point and numbers in secondary schools therefore will increase again. By 2018 they are projected to recover to 2013 levels.

a March 2014

Education Provision - County Durham Picture

4.1 Durham County Council has a statutory responsibility as the Local Authority to ensure there are sufficient school places for pupils within the County. Pupil place planning is a critical aspect of the Local Authority's duty to assess the local need for school places to ensure that every child can be provided with a place in a state funded school in County Durham. A pupil place planning document is produced annually which gives an overview of current and future pupil numbers which supports the future pattern and provision of school places across the County.

Forecasting Primary and Secondary Pupil Numbers

4.2 When Children and Adult Services produce and update the Pupil Place Planning document all pupil projections are based on relevant data provided from a range of sources, which includes:

- Health Authorities (live births);
- Termly School Census (January, October, May each year);
- Primary School patterns of transition to secondary school;
- Neighbouring Authorities (transfer of information regarding pupil movement across borders and school re-organisation proposals);
- Housing data on new build developments and demolition programmes that have received planning permission;
- Early Years and Sure Start (nursery/childcare figures); and
- Staying on rate at Post-16.

4.3 As a result of an increase in the birth rate, it is expected that there will be in the region of 1,220 more primary aged pupils by 2023/2024 than there were in 2013/2014. However, the increase does not take account any future residential developments that may come forward as part of the planning process that could have a significant impact on the future pattern and provision of school places in the primary sector.

4.4 Pupil rolls in primary schools are projected by using data provided by the Health Authority on the number of children born in County Durham. The data has postcodes and birth dates for all of the children which are then used to estimate the intake for the reception year of primary schools in forthcoming years.

4.5 Forecasting secondary school pupils is carried out at the same time as forecasting primary numbers. Primary numbers feed through to the secondary phase, so our current projections have the advantage that seven year groups are already in the school system.

4.6 The basic technique for forecasting secondary pupil numbers is to project forward the numbers of children transferring to secondary schools from specific primary schools each year. This exercise is carried out by Performance and Data Team within Children and Adults Services. We then adjust these forward projections to include other important factors.

4.7 These key factors are:

- **Expected House Building** - The School Places and Admissions Team receive information from colleagues in Regeneration and Economic Development (Development Management) on proposed housing developments which are in the process of seeking planning approval;
- **Migration Trends** - Migration trends means taking account of the additional numbers of children expected to move in or out of a particular area or neighbouring authority and the arrival of new migrants from abroad. Currently, less than 2% of our primary school pupils have moved in from other authorities and less than 2% of our resident population go out of the Authority for their education. We do not monitor nationalities of children, but English is the first language of nearly

98% of primary children. In respect of secondary schools, less than 1.5% of pupils have moved in from other authorities, but more than 5.5% go out of the Authority for their education. English is the first language for more than 98% of secondary children;

- **Changes in School Organisation** - Recent or planned changes in number, size, age range, and location of schools has an impact on pupil place planning. Pupil planning takes account of proposed changes to the current pattern and provision at primary age, 11-16, Post-16 and provision in Special Schools; and
- **Schools' Popularity** - The School Places and Admissions Team in Children and Adults Services monitors parental preference and admissions into schools. Any change in patterns of admissions to both primary and secondary schools is taken into account.

Surplus Places

4.8 While it is not cost effective to maintain large numbers of surplus places, local authorities cannot and should not try to eliminate all surplus capacity. A certain level of surplus places is necessary because:

- It allows greater opportunity to respond to parental choice;
- There may be unpredicted changes to demographic patterns, with a sudden influx of children to particular areas; and
- There may be unexpected changes to house building patterns.

4.9 There is no single 'ideal' level of overall surplus capacity, since this varies from authority to authority. It is reasonable to aim for between 5% and 10% overall surplus across the authority. Patterns show that a reasonable figure for urban areas is around 5% whereas in more rural areas it is around 10%. As Durham has a number of 'rural' areas the aim is to work to a target of no more than 10% surplus places overall. It is recognised that in some rural areas in County Durham it may be difficult to achieve this target.

Rising Pupil Numbers

4.10 As at 1 April 2015 in the primary sector there are 193 Primary Schools (8 of which are Academies), 14 Infant Schools and 13 Junior Schools (1 of which is an Academy). In the secondary sector there are 31 Secondary Schools (14 of which are Academies), 1 Sixth Form Centre and 2 14-19 Studio Schools.

4.11 Children and Adult Services continuously review data to determine those planning areas and schools where there will be pressure on school places in the future and allocate resources to provide additional school places. These places can be provided by either remodelling current accommodation, extending the current building or providing demountable buildings. The aim is to provide the extra places required as soon as possible subject to funding being available.

Projected Pupil Numbers (Primary)

4.12 The total number of primary school places available across all schools in the County is currently 44,196.

Projected Pupil Numbers (11-16)

4.13 The total number of secondary school places available across all schools in the County for pupils aged 11-16 is currently 32,286.

School Pupil Place Provision Context Statement

5.1 Pupil Place Planning is a critical aspect of the Local Authority's statutory duty to assess the local need for school places to ensure that every child can be provided with a place in a state-funded school in County Durham. The Local Authority has a statutory duty to assess the local need for school places to ensure that every child can be provided with a suitable place in a state-funded school in its area within high quality, stimulating and successful learning environments. The Local Authority needs to identify what school places are needed at present and in the future and how they will be provided. The challenge for the Local Authority in attempting to secure "value for money" and good quality education for all, is to provide the right number of places in the right locations.

5.2 Local Authorities need to show that they have robust procedures and systems for forecasting pupil numbers and identifying changes in local circumstances. These systems help to ensure there will be the right number of schools in the right places for the number of pupils expected in the future.

5.3 Schools submit data on pupil rolls to the Local Authority in October, January and May each year through the Termly School Census. A review of the projected rolls (for approximately 10 years hence) is carried out annually. Schools are encouraged to play an active role in the pupil place planning process and to identify at an early stage any concerns with projections that may impact on future school planning.

5.4 There is a diverse pattern of population distribution and school provision across County Durham so that there are both areas of place shortages and surplus places that currently exist both in specific locations and individual schools that see considerable levels of over and under subscription. The result is that specific locations and schools have either a deficient or a surplus of school places. It is important that any new house building should take account of available school surplus places, and that, new builds ought to strengthen community demand for school places. In addition, housing development needs to generate a pupil place demand which sits inside any council strategic vision for the primary school estate and its centrality to local community life.

Pre-application Discussions

6.1 The Council appreciates that developers will require certainty and expect to know the extent of any financial contributions necessary to mitigate the effects of their development prior to submitting a planning application in order to ensure the viability of their scheme. The methodology for contributions towards additional education provision is set out in this document and enables the level of contribution (if any) that is required on a clear and consistent basis. All advice provided by Council staff will be on a 'without prejudice' basis.

6.2 It should be noted that circumstances can change between contributions being calculated and formal assessment of a planning applications. Scenarios which could have an impact include:

- Other planning applications;
- Changes to scheme (e.g. number of houses);
- Annual updating of pupil forecasts;
- EFA funding reviews; and
- Changes to school management and structures.

Planning Applications

6.3 The need or otherwise for developer contributions towards education provision will be identified at either the outline or full planning application stage, or where a developer subsequently seeks to vary the number or type of units. Likewise, where a developer is seeking to renew an extant planning permission the need or otherwise for a contribution may also be reassessed.

Assessing the Sufficiency of Places

6.4 Contributions towards additional places will be sought where forecasts suggest that the appropriate education establishments in relation to the development cannot reasonably accommodate the expected increase in demand for places.

6.5 The Pupil Place Planning document as referred to in section 4 sets out the current and projected school rolls. This data is updated on an annual basis. The need for additional places may be immediate or gradual and it is necessary to take into account the future demand for places as well as the current positions because:

- Time lag between the planning application and completion of the development;
- Additional demand for places generally comes a few years after a development is first occupied; and
- The development will be a permanent feature of the local community and it should not just cater for the immediate impact.

6.6 When assessing the nearest school(s) to a development(s) to assess and calculate any developer contributions, the Council will apply a distance of 2 miles from the development measured by the shortest available safe walking route. The Council's School Places and Admissions Team can provide advice and guidance in relation to school rolls and forecasted pupil numbers. In addition they will also be able to provide advice in relation to relevant national and local policy and regulations in relation to education matters and Council policies and procedures for admissions and home to school transport.

Calculating Developer Contributions

Pupil Yield Methodology

7.1 New residential developments generate a demand for education places in all age groups over and above natural population changes. In terms of housing developments, some properties will clearly not generate a significant need for additional places such as student accommodation and care homes. Accurately predicting the number of pupils likely to be produced from new housing developments is not straightforward as it depends upon various factors including the location and type of housing.

7.2 Research in line with guidance from the Education Funding Agency^(b) has been undertaken on a number of existing housing developments^(c) in County Durham to determine the number of pupils produced. Each residence in the development was allocated a postcode and this is cross checked with information provided by schools via the pupil census. The pupil census lists all pupils attending schools in County Durham together with their address including the postcode.

7.3 The detailed research undertaken on a number of housing developments over the last 20 years has taken into account market trends and changes and indicates that the expected pupil yield from specific local 'family' housing developments as follows;

- 0.3 primary aged pupils per house^(d) (i.e. 'broadly' 3 houses typically generate one primary aged pupil)
- 0.12 secondary aged pupils per house^(e) (i.e. just under 10 houses typically generate one secondary aged pupil)

7.4 The pupil yields reflect demand for places generated, rather than actual children moving to the development. It also recognises that some children will not need to change school and some may attend private, selective or faith schools.

Cost of Additional Places

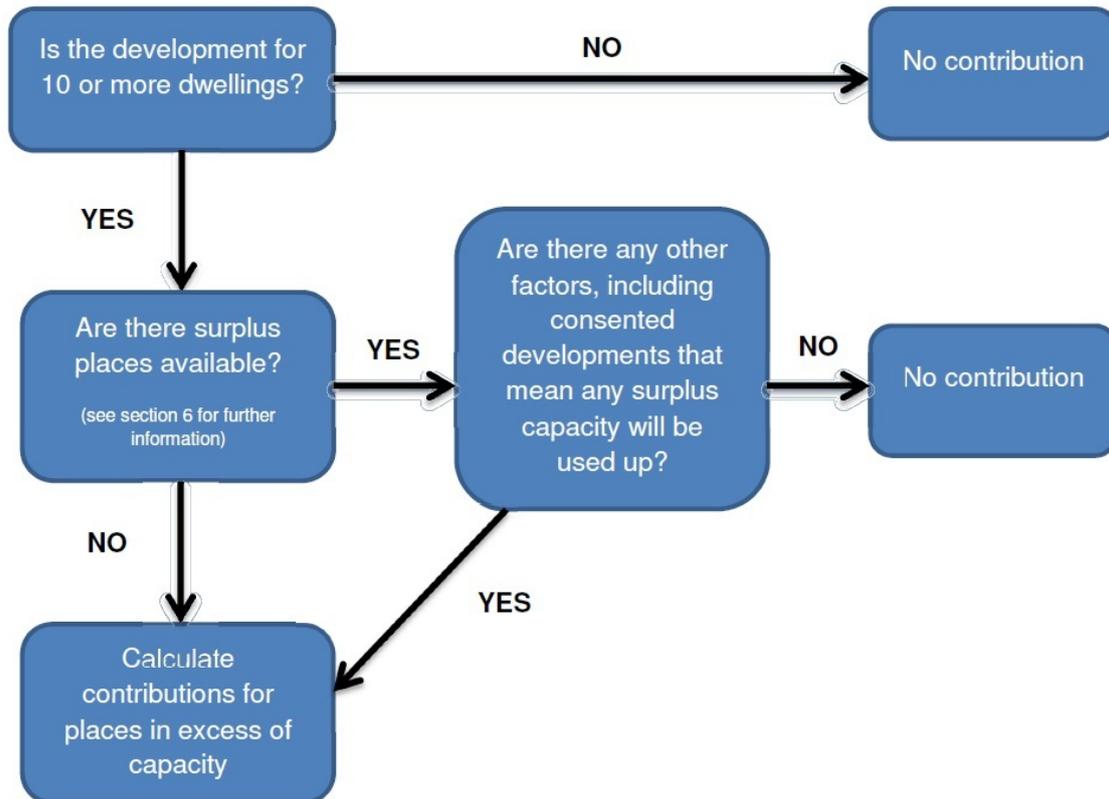
7.5 There is no requirement to calculate demand on school places from developments of less than 10 dwellings. For schemes of 10 or more dwellings, officers will advise whether the development will be able to be accommodated within existing capacity or if a contribution from the developers will be required.

b School Capacity (SCAP) Survey 2014 - Guide to forecasting pupil numbers in school place planning, June 2014, Education Funding Agency

c Relley Garth, Merryoaks, Meadowfield, Rosemount, Grayson Road, Winterton, Templetown, Bracks Farm, Cobblers Hall, Seaham, St Leonard's, Newcastle Road

d as at April 2015

e as at April 2015



7.6 Sites with planning permission should be considered deliverable until permission expires, unless there is clear evidence that schemes will not be implemented within five years, for example they will not be viable, there is no longer a demand for the type of units or sites have long term phasing plans.^(f)

7.7 The contribution for each excess space will be based on information supplied by The Education Funding Agency (EFA) with regard to cost rates and area standards contained in the EFA Contractors Framework issued in November 2013 (the cost with regard to Primary Schools have been increased following a funding review in October 2014). The current contribution required for the creation of a primary place is £11,705 and £15,920 for a secondary place. The costs may change in line with future funding reviews, therefore, these figures are not fixed and will be reviewed annually.

^f NPPF (Para 47)

Education Funding Agency advise the cost per primary school place to be:

- £1,370 per square metre for construction
- 17% fees for site costs and abnormals
- 12.5% design and statutory fees

Equals £1,803 per m²

Additional cost of £1,125 per pupil for ICT, furniture, fittings and equipment

Department for Education recommend 210 place primary school should be 1,232m²

1,232m² x £1,803 = £2,221,296 (construction, fees etc.)

£1,125 x 210 = £236,250 (ICT, furniture, fittings and equipment)

Total Cost of a 210 place primary school = £2,457,546

Cost per Pupil Calculation for Primary and Secondary Places

Cost per Primary Pupil = £2,457,546 ÷ 210 = £11,703 (round up to £11,705)

Cost per Secondary Pupil is 136%* of a Primary Pupil = £15,919 (round up to £15,920)

All pupil costs subject to indexation

* Based on DfE guidance issued in 2013 as part of the Targeted Basic Need Programme

7.8 To illustrate how the required developer contribution will be calculated, the example below shows the calculation for a 100 dwelling development in area where there is existing surplus school capacity of 10 primary places and 5 secondary places.

Number of Dwellings x Pupil Yield (*less any surplus places*) x Cost of Places = Developer Contribution

Primary Example

(*if contributions are needed and includes surplus places*)

100 Dwellings x 0.3 = 30 places, less 10 surplus places = 20 places required

20 x £11,705 = £234,100 (Developer Contribution)

Secondary Example

(*if contributions are needed and includes surplus places*)

100 Dwellings x 0.12 = 12 places, less 5 surplus places = 7 places required

7 x £15,920 = £111,440 (Developer Contribution)

7.9 The calculated developer contribution derived from the above calculation could vary with the residential mix of the development scheme and as such until a scheme gains full planning permission approval any assessment is indicative.

Developments where New Schools are Required

7.10 Where new developments trigger the need for a new build school, discussion and negotiations will need to take place to agree the location, design, specification, size, number of classrooms, non-teaching space, play area provision etc. The full cost of the new build will need to be agreed, along with developer contributions as part of the planning process. The arrangements detailed in this document will not be relevant in these cases and early discussions with Council officers are encouraged.

Securing the Financial Contribution

7.11 The Council has a role in assessing the likely impact of a new development on the service it provides, however, it is also the Local Planning Authority's role to decide whether or not the level of contributions requested are appropriate and in line with the Community Infrastructure Levy Regulation 2010 (regulations 122 and 123), which are;

- necessary to make the development acceptable in planning terms;
- directly related to the development; and
- fairly and reasonably related in scale and kind to the development.

7.12 Where the CIL regulations above are satisfied, any financial contribution required would be secured at the time planning permission is granted (either outline or full) by way of a planning obligation pursuant to Section 106 of the Town and Country Planning Act 1990. The section 106 agreement would set out an appropriate trigger for the payment of the contribution, and it is expected that the contribution should be a single payment rather than provided in stages.

Viability

7.13 The Council is mindful of national advice on viability and decision-taking. Decision-taking on individual schemes often involves an assessment of viability to ensure realistic decisions are made to support development and promote economic growth. Where the viability of a development is in question, the local planning authority will look to be flexible in applying infrastructure requirements wherever possible.