

## TRAFFORD COUNCIL

**Report to:** Children and Young People's Scrutiny Committee  
**Date:** 4 February 2021  
**Report for:** Information  
**Report of:** Karen Samples, Director of Education

### Report Title

Trafford School Sufficiency and Place Planning

### Summary

A detailed description of the approach to strategic school place planning in Trafford to make sure there continues to be sufficient school places for current and future children living in our area.

### Recommendation(s)

That the contents of the report are noted:

- Place planning forecasting methodology
- Basic need funding
- Pupil yield from new housing developments
- Process for opening a new school
- Early years and childcare sufficiency

### Contact person for access to background papers and further information:

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## 1. Introduction

Effective pupil place planning is a fundamental element of the Local Authority's role as strategic commissioner of good school places and ensures that the legal sufficiency duty to ensure that every child has access to a school place is met.

The Department for Education (DfE) requires each local authority to submit an annual school capacity survey (SCAP) which provides forecasts for both primary and secondary places by a method monitored and ratified by the DfE.

Primary projections must cover Reception to Year 6 for five years ahead. Secondary projections must cover Year 7 to Year 11 (plus Years 12 and 13 where schools have sixth forms) for seven years ahead.

Since local authorities use different methods to forecast pupil numbers and take different factors into account, the DfE requires each LA to submit a forecast methodology to demonstrate that the forecasts are robust and well-evidenced.

## 2. Trafford Forecast Methodology

2.1 Trafford has determined 6 primary and 5 secondary school planning areas:

Primary Planning Areas	Secondary Planning Areas
<ul style="list-style-type: none"> <li>• Altrincham</li> <li>• Partington</li> <li>• Sale East</li> <li>• Sale West</li> <li>• Stretford</li> <li>• Urmston</li> </ul>	<ul style="list-style-type: none"> <li>• Altrincham</li> <li>• Partington</li> <li>• Sale</li> <li>• Stretford</li> <li>• Urmston</li> </ul>

In building its projections Trafford considers data from a number of sources:

- A. Data on pre-school children, registered with a GP as resident in Trafford, is provided by Manchester University NHS Foundation Trust (MFT) at postcode level. The data is processed against Trafford's Local Land and Property Gazetteer (LLPG) to determine the catchment area and planning area.
- B. The School Census provides data on the number pupils on roll in each of Trafford's schools
- C. Trafford's Strategic Planning Department provide new housing development data which is also assigned to a catchment area and a planning area
- D. Co-ordinated admissions data is used to forecast the anticipated movement of children in to and out of the Local Authority
- E. Historic cohort data is used to predict the pattern of movements in the last 3 years.

2.2 The GP registrations data is quality checked against known parameters for accuracy. For the 2019 submission the LA returned the data to the provider twice for checking before being satisfied that the data was accurate. This data sharing process is restricted by GDPR which limits the data to postcode level rather than pupil level. Postcodes are checked against pupils in the nursery year on the school census to check for missing children however, this can only indicate that the data is inaccurate, it cannot confirm its accuracy.

2.3 The three preceding data sets are compared to provide and ratify the % growth in the cohort from birth to age 4. This growth % is then added to the cohort for each planning area.

2.4 Survival rates (the number of children in the cohort accessing state funded education) are calculated by comparing census data to forecasts and employing a weighted average where the most recent year is counted twice.

2.5 Average migration rates are established from admission round data from the 4 preceding admission rounds and applied to the forecasts for each planning area.

- 2.6** Forecasting the cohort roll forward is achieved as each preceding cohort is moved on to the next year group, through to Y6 and then the primary to secondary “survival rate” for each cohort is calculated from past records, using a 3 year weighted average (double counting the most recent year) to smooth out any variations. The consideration is limited to the 3 most recent years to ensure that current trends are reflected. Trends are also interpreted in the light of local knowledge as required.
- 2.7** The percentage of pupils staying on Post-16 is calculated from historic data and interpretation of trends in the last 3 years (again using a 3 year weighted average). An element is added to the Y12 forecast to account for new admissions. Y13 is calculated using historic survival rates from Y12 to Y13.
- 2.8** DfE expects local authorities to seek developer contributions towards school places that are created to meet the need arising from housing developments. We use a pupil yield rate to establish how many additional pupils needing school places are likely to be generated by new developments and this is used to calculate the developer contribution. The pupil yield rate for the primary and secondary sector averages 3 additional pupils per school year, per 100 homes and for the 6th form sector, this has remained at 2 pupils per school year, per 100 homes

Trafford’s Strategic Planning Department provides a list of new housing developments that have achieved planning permission. This is divided into two sections; under development and committed. The data is provided by school catchment areas to show exactly which schools are likely to be affected by nearby developments. Importantly, this information is included in the annual school capacity survey submitted to DfE so that funding can be deducted rather than added. This is because the DfE expects these places to be funded by the developer. If sufficient developer contributions are not collected, the local authority have to fund the places required from other sources.

- 2.9** Primary Projections - In Forecast Year 1 (the upcoming academic year) the primary data submission is based on actual applications received. In Forecast Year 2 ‘under development’ schemes are included with the ‘committed’ housing being taken into account on a sliding scale for Forecast Years 3, 4 and 5 at 10%, 20% and 30% respectively. Housing data is then added to the projected figures to complete the forecasting information.
- 2.10** Secondary Submission - In Forecast Years 1 and 2 ‘under development’ schemes are included with the ‘committed’ housing being taken into account on a sliding scale for years 3, 4 and 5 at 10%, 20% and 30% respectively. Housing data is then added to the projected figures to complete the forecasting information.

### **3. Basic Need Funding and Education Capital Programme**

- 3.1** Accurate and consistently-derived forecasts are essential to ensure that the LA receives an appropriate Basic Need Grant allocation and that any allocation received is spent appropriately.
- 3.2** The 2021-22 Basic Need funding rate per pupil place:
- Primary = £13,659 per pupil
  - Secondary = £17,757 per pupil

3.3 Between 2010 and 2022, Trafford has received £78m of basic need funding.

3.4 The LA has commissioned the expansion of 29 schools and provided an additional 3,681 places over the last 10 years:

School	Description	Completion	No. Places
2 Schools	Various expansions	Sept 2010	140
3 Schools	Various expansions	Sept 2011	420
3 Schools	Various expansions	Sept 2012	203
2 Schools	Various expansions	Sept 2013	210
4 Schools	Various expansions	Sept 2014	770
5 Schools	Various expansions	Sept 2015	553
Oldfield Brow	Expand from 1 to 2FE	Oct 2016	210
Brentwood	Relocate and expand to 150	Sept 2016	50
Worthington	Expand from 40 to 1.5FE	Sept 2016	35
Park Road, Sale	Expand from 45 to 2FE	Sept 2017	105
Broadheath	Expand from 2FE to 3FE	April 2018	210
Brooklands	Expand from 70 to 3FE	Sept 2018	140
Gorse Hill	Expand from 50 to 2FE	June 2019	70
Worthington	Expand from 45 to 2FE	Nov 2020	105
Blessed Thomas Holford	Expand to PAN 290	On target Oct 2021	400
Sale High	Expand from 198 to 210	Ongoing	60
<b>Total</b>			<b>3,681</b>

#### 4. New Housing Developments

4.1 DfE are currently preparing a standardised pupil yield methodology which each local authority is feeding in to. In the meantime they have produced guidance on [Securing Developer Contributions for Education](#) so housing developers contribute to the cost of providing the new school places required due to housing growth.

4.2 In Trafford, the pupil yield rate for the primary and secondary sector averages 3 additional pupils per school year, per 100 homes.

4.3 Historically, families did not tend to live in apartments but this has changed over time and our data indicates that apartments now also generate pupils, especially those located within the catchment areas of popular schools. Therefore the pupil yield calculation is applied to apartments and houses which have 2 or more bedrooms.

4.4 In addition to funding the provision of new places, developer contributions can also assist with condition and suitability related costs at nearby schools.

4.5 Historically, developer contributions have been calculated using the basic need funding rate per pupil. However DfE now advise that the developer contributions are calculated based on national average costs published in the DfE school place scorecards to ensure developer contributions reflect the actual cost of providing school places. For Trafford, the rates for permanent expansions are as follows:

- Primary = £15,737 per pupil
- Secondary = £21,872 per pupil (national figure with regional adjustment)

- 4.6** Trafford has a strategic priority to expand existing schools to safeguard their financial viability and to remove mixed age classes where these exist by increasing to full forms of entry. This maximises the impact of basic need funding, whilst providing opportunities to improve the suitability and condition of the existing stock. Trafford has been identified by DfE as an exemplar local authority with regards to its effective and efficient use of basic need funding.
- 4.7** An analysis has been undertaken of all the existing schools in terms of expansion potential. Some schools have now been fully expanded but there are a number of schools which still have potential to be expanded.
- 4.8** The cumulative effect of numerous small housing developments (less than 50 units) is significant. Developers tend to identify local schools which they consider have capacity to take the small number of pupils that might be generated. However this requires a local authority coordinated approach to avoid double counting of places.
- 4.9** When planning school places, it is advised an operational surplus of 5-10% should be retained to allow for fluctuations in demand and parent choice and this surplus cannot be counted as vacant places. Places in limited year groups are also excluded.
- 4.10** The majority of Trafford primary schools are at capacity and so any developer must be expected to fund the cost of new pupils generated which can be pooled by the local authority towards expansions or new school developments. The majority of Trafford secondary schools are also full although most have capacity to accommodate pupils from within their catchment area.
- 4.11** Since 2012, Trafford has actually received a total of £464k in developer contributions.

## **5. Opening a new school**

- 5.1** The Education Act 2011 changed the arrangements for establishing new schools and introduced the free school presumption which requires local authorities to seek proposals to establish a free school where they have identified the need for a new school in their area.
- 5.2** The free school presumption process is the main route by which local authorities establish new schools in order to meet the need for additional places. All new schools established through the presumption process are classified as free schools. This reflects the fact that 'free school' is the DfE term for any new provision academy. 'Academy' is the legal term for state-funded schools that are independent of local authority control and receive their funding directly from the government.
- 5.3** The presumption process requires local authorities that have identified a need for new pupil places and are considering ways to provide them, to contact the relevant Regional Schools Commissioner's office as early as possible to ensure that there is a common understanding of action being taken to provide new school places.
- 5.4** Under the presumption route the local authority is responsible for providing the site for the new school and for delivering the capital programme for building the new school. It is the department's expectation that the site be made available free or on a

peppercorn basis by the local authority to the trust. The local authority is also responsible for meeting the associated capital and pre/post-opening revenue costs.

- 5.5** The DfE expect that developers will pay for creating places to meet demand created by new housing developments and these are excluded from the basic need capital funding calculation. Guidance states that larger developments should ensure there is adequate land set aside for a school large enough to accommodate the pupils generated from the units planned for the site. Developer contributions towards new school places should provide both funding for construction and land where applicable, subject to viability assessment when strategic plans are prepared.
- 5.6** A new school will need to be subsidised by the local authority until it has sufficient pupils to make it viable, therefore the timing of any school is crucial. Importantly, any school with less than 2 forms of entry could not be considered to be financially viable at any point in the future. This means that any new school might only be practically considered where the development has 2,000+ units of 2 bedrooms or more.
- 5.7** In terms of sufficient land and funding, the following table shows the recommended areas and estimated cost for the provision of new primary and secondary schools of various sizes:

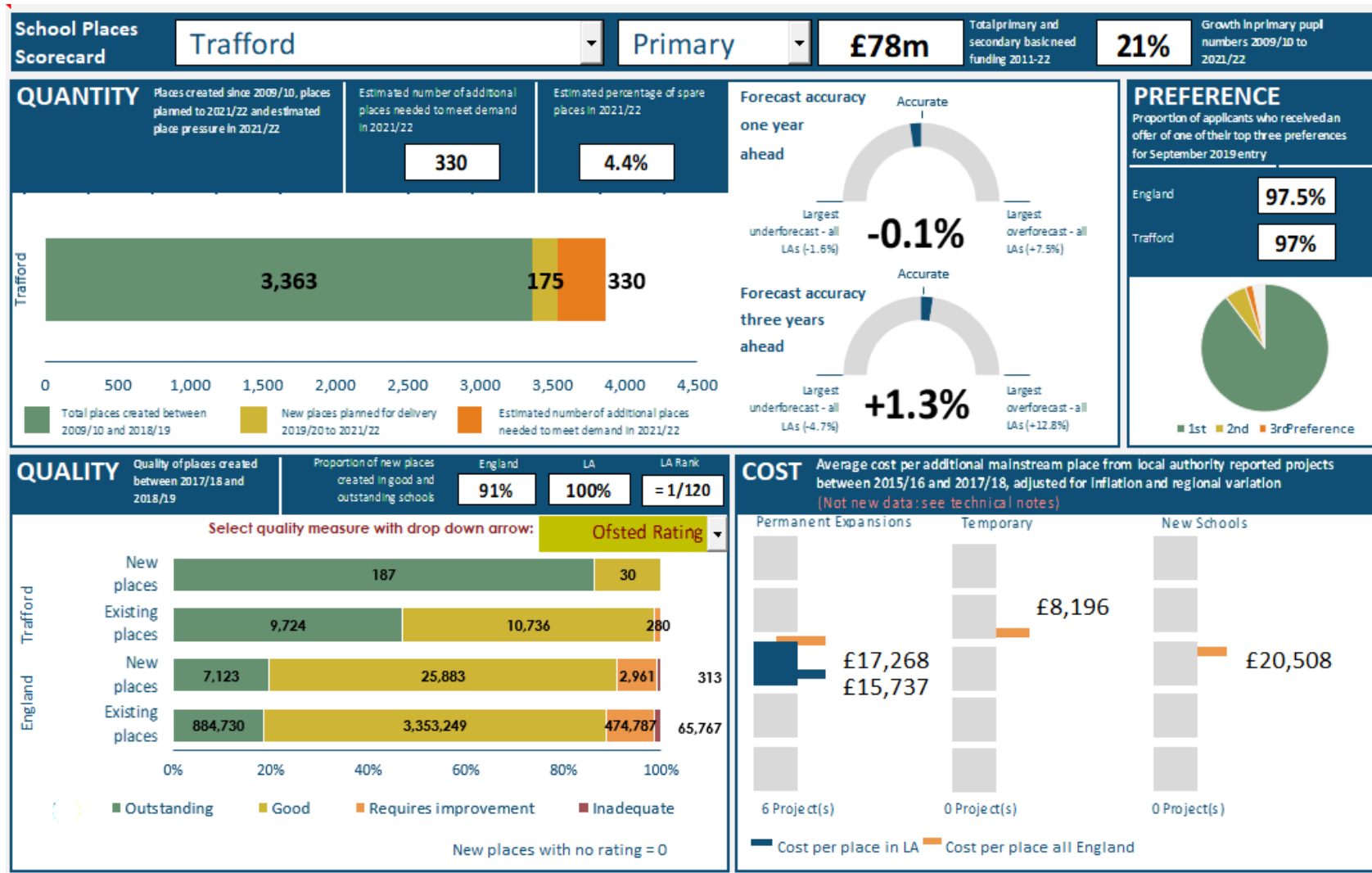
Type and Size	Recommended Site Area (m <sup>2</sup> )	Recommended Building Area (m <sup>2</sup> )	Estimated Budget (£)
2 Form Entry Primary School (420 pupils) & Nursery (26 pupils)	16,142	2,132	£6m
3 Form Entry Primary School (630 pupils) & Nursery (26 pupils)	23,135	3,245	£8.5m
5 Form Entry Secondary School (750 pupils age 11 to 16 years)	46,500	5,775	£17.5m
7 Form Entry Secondary School (1,050 pupils age 11 to 16 years)	61,500	7,665	£22.5m

The areas have been calculated using [Building Bulletin 103 – Area guidelines for mainstream schools](#). The estimated budget is for guidance purposes only based on an all-in build rate of £2,408/m<sup>2</sup> plus an allowance for externals and fees in 2019.

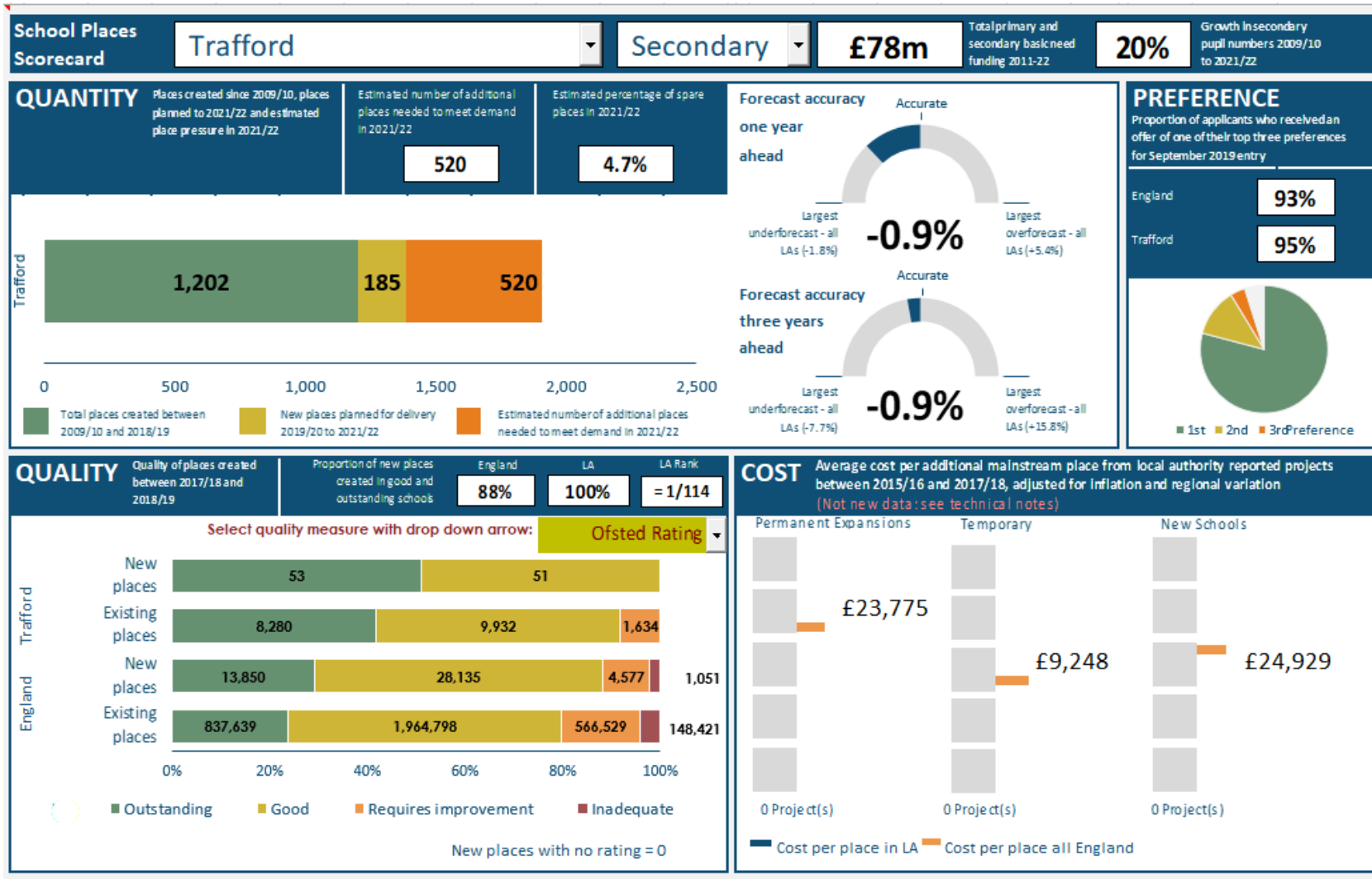
- 5.8** The decision on all new free school proposals lies with the Secretary of State who will enter into a funding agreement with the sponsor chosen to run the new school. The Secretary of State will consider any recommendation on the choice of a proposer made by the local authority. However, in some cases the Secretary of State may have additional information about the capacity, capability or the academic track record of a proposer which he will take into account when making his decision. The Secretary of State's decision is normally delegated to the Regional Schools Commissioner (RSC) for the area in which the school will be located.

## 6. DfE School Places Scorecards

- 6.1 DfE publishes school places scorecards for each local authority to highlight the challenges local authorities face in making good school places available; funding given to local authorities and their progress in providing school places.
- 6.2 Trafford's primary scorecard indicates forecast accuracy of within 0.1% for 1 year ahead and 1.3% for 3 years ahead and also shows the cost of providing a permanent school place in Trafford is lower than the national figure.



6.3 Trafford's secondary scorecard indicates forecast accuracy of within 0.9% for 1 year ahead and 0.9% for 3 years ahead.





## **7. SEND Capital**

- 7.1** In March 2017, DfE announced all local authorities would receive a share of the special provision fund, to make capital investments in provision for pupils with special educational needs and disabilities. The allocation supported the creation of new places in specialist provision and improvements to facilities in existing schools.
- 7.2** Trafford's overall SEND Capital allocation for 2018 to 2021 was £1,752,704.
- 7.3** Completed schemes include Egerton High School and Manor Academy expansions; hoists at Pictor Academy; training kitchen and music studio developments at Gorse Hill Studios. Building works are currently on site at Delamere to build a new hydrotherapy pool and there are ongoing discussions for further small specialist class provision at Lostock High School.
- 7.4** A further round of SEND Capital has been announced and we are awaiting further details about whether this will be a formulaic allocation to local authorities or a bidding process.

## **8. Early Years and Childcare Sufficiency**

- 8.1** Trafford has a buoyant childcare market that has always responded to meet local need, resulting in one of the highest number of childcare places in England per population aged 0 to 5 years.
- 8.2** The market is mixed with 164 childminders and 106 group settings in the private, voluntary and independent (PVI) sector offering funded early education places. A further 54 childminders are registered with Ofsted but only offer places to fee paying families.
- 8.3** 57 out of 60 mainstream infant and primary schools have a nursery class offering funded places to 3 year old children (although one is temporarily closed) and 2 schools also offer places to 2 year old children.
- 8.4** There are 3 primary special schools with foundation stage units offering nursery assessment places for children with special educational needs and disabilities. Each unit can offer up to 12 part time nursery assessment places, giving a maximum capacity of 36 part time assessment places across Trafford. At present there are 21 children accessing a place. Nursery assessment places are for 3 year old children and usually last for one academic year.
- 8.5** Trafford is a net importer of early years places meaning there are more out of area children who travel into Trafford to access a place than there are Trafford children who access a place in a different area. There is a variety of reasons for families travelling into the area including geographical location as the A56 is an arterial route into central Manchester, popular with commuters. Many parents choose to access childcare close to their place of work and there are large employers located in Trafford Park and the Trafford Centre. Education provision in Trafford has an excellent reputation with achievement often featuring amongst the highest in England making it a popular choice for residents of neighbouring authorities who choose to travel over the border.

- 8.6** The local authority receives an amount per funded child through the Early Years Block of the Dedicated Schools Grant, 5% of which is permitted to be retained to deliver central local authority services. This means being a net importer for early education places creates additional income for Trafford to spend on services such as Early Years Service, Family Information Service and SEND Support Services for young children.
- 8.7** Covid has had a significant impact on the early years and childcare sector and the true impact will not be known until we enter a full recovery period. There is ongoing work to monitor early years and childcare sufficiency linked to Covid recovery, in addition to the usual full assessment carried out every 3 years. However at present there is little evidence of a sufficiency issue with a healthy pre-Covid market affording us a level of protection.