

WOKINGHAM BOROUGH COUNCIL

A Meeting of the **SCHOOLS FORUM** will be held at the Civic Offices, Shute End, Wokingham RG40 1BN on **WEDNESDAY 16 MARCH 2016 AT 9.30 AM**

A handwritten signature in black ink, appearing to read 'Andy Couldrick', written in a cursive style.

Andy Couldrick
Chief Executive
Published on 8 March 2016

This meeting may be filmed for inclusion on the Council's website.

Please note that other people may film, record, tweet or blog from this meeting. The use of these images or recordings is not under the Council's control.

Our Vision

A great place to live, an even better place to do business

Our Priorities

Improve educational attainment and focus on every child achieving their potential

Invest in regenerating towns and villages, support social and economic prosperity, whilst encouraging business growth

Ensure strong sustainable communities that are vibrant and supported by well designed development

Tackle traffic congestion in specific areas of the Borough

Improve the customer experience when accessing Council services

The Underpinning Principles

Offer excellent value for your Council Tax

Provide affordable homes

Look after the vulnerable

Improve health, wellbeing and quality of life

Maintain and improve the waste collection, recycling and fuel efficiency

Deliver quality in all that we do

MEMBERSHIP OF THE SCHOOLS FORUM

Schools Representatives

| | |
|------------------|---|
| John Bayes | Governor - Foundry College - Chairman |
| Paul Miller | Governor - St Crispins - Vice-Chair |
| Phil Armstrong | Maintained Nursery Headteacher |
| Helen Ball | Primary Head - Polehampton Infant |
| Ali Brown | Primary Head - Nine Mile Ride Primary |
| Louisa Gurney | Primary Head - Emmbrook Junior |
| Sally Hunter | Primary Head - Wescott Infant |
| Brian Prebble | Primary Head - Rivermead Primary |
| Eileen Rogers | Primary Head - Gorse Ride Junior |
| Elaine Stewart | Primary Head - Aldryngton Primary |
| Mandy Turner | Primary Head - Shinfield Infant & Nursery School |
| Ginny Rhodes | Secondary Head - St Crispins |
| Sylvia Allen | School Business Manager - Hawkedon - Primary Rep |
| Liz Meek | Special School Head - Addington School |
| Julia Mead | School Business Manager, St Sebastian's - Primary Rep |
| Dominic Geraghty | Special School Head - Southfield School |
| Carol Simpson | School Business Manager, Colleton - Primary Rep |
| Mary Rome | Pupil Referral Unit - Foundry College Headteacher |
| Derren Gray | Academy Headteacher - The Piggott School |
| Janet Perry | Academy Business Manager - The Holt School |
| Ian Head | Governor - Aldryngton Primary |

Non School Representatives

| | |
|---------------------|---------------------------------|
| Vacancy | Roman Catholic Diocese |
| Anne Andrews | Oxford Diocese |
| Ian Pittock | Wokingham Borough Council |
| James Taylor | Wokingham and Bracknell College |
| Charlotte Wilkinson | Early Years Forum |
| Vacancy | Early Years Forum |

Observers

| | |
|---------------------|---|
| Funding Reform Team | Education Funding Agency, Maintained Schools Division |
|---------------------|---|

From the Special School Heads only 1 vote is allowed.

From the Early Years only 1 vote is allowed.

| ITEM NO. | WARD | SUBJECT | PAGE NO. |
|----------|------|--|----------|
| 63 | | APOLOGIES To receive any apologies for absence. | |
| 64 | | MINUTES OF PREVIOUS MEETING To confirm the Minutes of the Meeting held on 20 January 2016. | 5 - 10 |
| 65 | | DECLARATION OF INTEREST To receive any declarations of interest. | |

| | | |
|-----------|---|----------------|
| 66 | REVENUE MONITORING To receive and consider a report outlining the current outturn position on the schools budget. | 11 - 14 |
| 67 | DRAFT 2016/17 BUDGET To receive and consider a report giving details of the draft 2016/17 schools budget. | 15 - 18 |
| 68 | SEN ALERT To receive and consider a report giving details on the financial implications of the Special Educational Needs provision. | 19 - 20 |
| 69 | BENCHMARKING To receive a report containing local statistical information to allow consideration to be given to benchmarking. | 21 - 26 |
| 70 | PRIMARY STRATEGY To receive and consider the Primary Strategy report and the implementation paper. | 27 - 74 |
| 71 | FORWARD PROGRAMME To consider the Forums work programme for the remainder of the municipal year. | 75 - 76 |

Any other items which the Chairman decides are urgent

A Supplementary Agenda will be issued by the Chief Executive if there are any other items to consider under this heading.

CONTACT OFFICER

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**MINUTES OF A MEETING OF THE
SCHOOLS FORUM
HELD ON 20 JANUARY 2016 FROM 9.30 AM TO 11.40 AM**

Schools Representatives

| | |
|----------------|--|
| John Bayes | Governor - Foundry College - Chairman |
| Helen Ball | Primary Head - Polehampton Infant |
| Ali Brown | Primary Head - Nine Mile Ride Primary |
| Louisa Gurney | Primary Head - Emmbrook Junior |
| Elaine Stewart | Primary Head - Aldryngton Primary |
| Mandy Turner | Primary Head - Shinfield Infant |
| Sylvia Allen | School Business Manager - Hawkedon Primary |
| Julia Mead | School Business Manager, St Sebastian's CE Primary |
| Carol Simpson | School Business Manager, Colleton Primary |
| Liz Meek | Special School Head - Addington School |
| Ginny Rhodes | Secondary Head - St Crispins |
| Derren Gray | Academy Headteacher - The Piggott School |
| Janet Perry | Academy Business Manager - The Holt School |
| Paul Miller | Governor - St Crispins |
| Ian Head | Governor - Aldryngton |

Non School Representatives

| | |
|--------------|---------------------------|
| Anne Andrews | Oxford Diocese |
| Ian Pittock | Wokingham Borough Council |

Also Present

Luciane Bowker, Democratic Services Officer
Donna Munday, Schools Finance Manager
Alan Stubbersfield, Interim Assistant Director Learning and Achievement
Rob Stubbs, Head of Finance

52 APOLOGIES

Apologies for absence were submitted from Phil Armstrong, Dominic Geraghty, Brian Prebble, Mary Rome, James Taylor and Charlotte Wilkinson.

53 MINUTES OF PREVIOUS MEETING

The Minutes of the meeting of the Committee held on 16 December 2015 were confirmed as a correct record and signed by the Chairman. It was recognised that the minutes were a fair reflection of the discussions, but that there was a level of ambiguity in the description of the requests of officers that had been made and in the decisions that had been recommended.

Members requested that going forward the draft minutes be circulated to all Members via email as soon as possible so that inaccuracies can be corrected prior to the next meeting.

54 DECLARATION OF INTEREST

There were no declarations of interest submitted.

55 ELECTION OF VICE-CHAIRMAN

Paul Miller, Governor of St Crispins School was elected Vice-chairman for the remainder of the 2015/ 2016 academic year.

56 ALLOCATION OF PUPIL PREMIUM GRANT FOR LOOKED AFTER CHILDREN

Alan Stubbersfield, Interim Assistant Director Learning and Achievement presented the report giving a brief explanation of the proposed changes to the allocation of Pupil Premium Grant (PPG) for Looked After Children (LAC).

The following comments were made during the discussion of the item:

- Some Members expressed concern that under the proposed new system schools would no longer receive direct funding;
- Alan explained that the funding allocation would be based on each LAC's Personal Education Plan (PEP) and this would continue to be drawn up in conjunction with the school. The process would be monitored by the Virtual School Headteacher;
- Alan stated that the new system would enable a prediction of resources and reassured that a flat rate would be retained for at least part of the allocation;
- Some Members expressed concern as to how the PPG would sit with the Special Educational Needs (SEN) funding. Members reported that in their experience at moderation meetings this money was asked to be included with the SEN funding. However, it was noted that this grant was supposed to be used reactively for activities such as school trips with the aim to narrow the gap between the LAC's educational level and that of their peers;
- In response to a question, Alan clarified that schools would continue to receive the deprivation fund;
- Alan agreed to keep Schools Forum informed on the PPG funding allocation and the 'pool' balances.

RESOLVED That the report be noted.

57 REVENUE MONITORING

The Forum received the Schools Budget Financial Monitoring Report – January 2016 which was set out in agenda page 11. Donna Munday, Schools Finance Manager explained the current outturn position on schools budget funded by the Dedicated Schools Grant (including Education Funding Agency EFA), Pupil Premium Grant (PPG) and Universal Infant Free School Meal Grant.

Donna stated that there had been an improvement of £47k since the last meeting of the Forum. However, it was highlighted in the report that there was an in year deficit as spend was higher than the income received. This year's budget was set at £649k more than the allocation from DfE and the current position was now forecasted to spend £174k more than allocated.

Donna estimated that Early Years fund would see a potential underspend of £57k at the end of the financial year and the final payment was due in the spring term.

Donna reported that the National Non-Domestic Rate (NNDR) revaluations that took place during October had now been received. The impact to the contingency account had increased by a further £45k. There were still two outstanding queries to be resolved by the year end, but Donna did not expect this would have a significant impact to the account. Donna clarified that academies were subject to the same risks as maintained schools.

The report informed of £35k less being required from this year's Growth Fund as a result of the pre start up project cost negotiations having concluded with both new providers for the two new schools opening in September 2016.

RESOLVED That: The report be noted.

58 DRAFT 2016/17 BUDGET

The Forum considered the draft budget reports which had been sent via email earlier in the week. Donna stated that the indicative budget had been based on an estimate. However, since the last meeting of the Forum the DSG settlement had been received and was slightly better than anticipated. There was an additional £823,000 Schools Block funding that could be allocated via the formula. This was based on pupil numbers and therefore it was expected that the funding would continue at the same level in the future.

Donna explained that there had been a cash adjustment based on lagged free schools' pupil numbers. The first free school allocation had been received in 2015/16. The DfE had adjusted the 2016/17 funding to reflect the actual pupil numbers as well as based the funding on the actual October census. It was noted that there had not been an actual increase in pupil numbers.

It was anticipated that there would be an increase in funding for licenses but the cost was also expected to rise.

Donna pointed out the Proforma in appendix A which considered the additional £823,000 as a starting point. This Proforma had each AWPU rate increased by £18.60 which had the overall impact of reducing MFG from £2.2m in 2015/16 to £1.4m whilst maintaining the 1:1.27 ratio. This would reduce the number of schools receiving MFG from 48 down to 36. The maximum surplus achievable in this scenario would be £1.2m.

The Forum considered the report, the risks and the scenarios presented. During the discussion the following comments were made:

- Members asked if it was possible to run up a deficit. Donna stated that it was, but it would not be possible to allocate this money out to schools through the formula without running the risk of increasing MFG in the following financial year;
- It was noted that the deprivation factor had been updated by the DfE resulting in a reduction on the number of pupils categorised as living in a deprived area by approximately 500. This equated to £218,000 in monetary terms;
- It was pointed out that the MFG could be reduced or removed by the DfE as it was a transitional protection and schools would be in a vulnerable position should this happen. Appendix B provided a surplus of £800,000 maintaining MFG at a level of £1m, in this case if MFG was removed or reduced the surplus could then be used to offset the MFG impact;
- The budget was based on the assumption that there would be £800,000 carried forward at the end of this financial year. There were still three months of transactions to be processed before this could be verified;
- It was expected that the increase in the national minimum working wage would have a negative impact in the school's finances and this should be taken into account;
- The planned housing and schools expansions across the Borough would have an impact in the budget. As well as bringing additional schools revenue it could bring along pupils with special educational needs. Such pupils were not funded for their personal needs; the pre-existing High Needs Block would have to cater for them, it

was suggested that the Forum may wish to consider setting up a High Needs Block Contingency line within the budget proposal;

- Robs Stubbs, Head of Finance stated that Wokingham Borough Council planned to continue with the housing expansion programme and it was expected that there would be a 25% increase in housing in the next 10 years;
- It was agreed by Members that it would be beneficial to reduce the number of schools on MFG;
- Councillor Ian Pittock stated that schools in Wokingham would not see a reduction in pupil numbers as a result of the new school in Arborfield. He also said that he was confident that the new school would exceed the 90 pupils initial admission number;
- Members were of the opinion that children attending school now should not be disadvantaged by reduced funding in their schools in order to subsidise the new schools;
- It was noted that all options involved a certain level of risk and it was important to find a balanced budget;
- Donna stated that the £218,000 deprivation factor had been included in the calculations of the proposed budget options;
- Louisa Gurney stated that at the Primary Headteachers' meeting it had been agreed to take the £218,000 and add it to the AWPU.

Regarding the deprivation factor, the Forum agreed to keep rates constant in line with Scenario 2 of the report.

Donna recommended that Forum adopted the Proforma found in Appendix B with a reserve of £800,000. Rob asked Members to be mindful that Wokingham Borough Council had received the worst financial settlement from central government in years, and it was not expected to increase in the near future. Rob pointed out that the £800,000 reserve should be treated carefully as it was highly unlikely that schools would receive additional funding in the future.

After much debate Donna reminded the Forum that a decision had to be made in order to submit the Proforma to the EFA on the 21 January 2016. Having considered and debated all the options, the Forum asked Donna to produce a budget which was based on final reserve of circa £500,000, somewhere between the balanced 'yellow' budget and the deficit 'red' budget.

RESOLVED That:

- 1) The deprivation factor of £218,000 be taken with AWPU;
- 2) Donna would produce a Proforma budget submission based on a reserve of circa £500,000.

59 FINAL PROFORMA FOR SUBMISSION TO EFA

The consideration of the final Proforma for submission to EFA took place with the discussions of item 58.

60 PRIMARY STRATEGY

Councillor Ian Pittock stated that the Primary Strategy report had been published to the Wokingham Borough Council's website on Monday 18 January 2016. The report was attached to the Executive agenda and was going to be discussed at the Executive meeting on 28 January 2016.

Members of the Forum expressed frustration with the length of time it had taken for the report to become available and the number of times it had been deferred from Schools Forum agenda.

It was agreed that Members would be sent the link to the web page containing the report and that the item would be brought for information to the Schools Forum at the 24 February 2016 meeting.

RESOLVED That:

- 1) Members would be sent a web link to the Primary Strategy report;
- 2) the Primary Strategy would be considered at the meeting on 24 February 2016.

61 FORWARD PROGRAMME

The Forum considered and noted the Forward Programme of work and dates of future meetings as set out on Agenda page15.

The following items were included in the Forward Programme:

- 24 February 2016 - Primary Strategy;
- 18 May 2016 - A report containing an analysis of the budget line 'Fees for Independent Special Schools'

Members asked that in the future all SEN Alert updates be provided in the format of a written report with the main agenda document.

It was agreed that the next meeting would be at Wokingham Borough Council on 24 February 2016 at 9.30.

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SCHOOLS FORUM

Schools Budget Financial Monitoring Report – March 2016

Purpose of the Report

- 1 The purpose of this report is to provide details of the outturn position on the Schools Budget funded by the Dedicated Schools Grant (including EFA funding), Pupil Premium Grant and Universal Infant Free School Meal grant.

Suggested Action

- 2 The Forum are asked to note the contents of this report.

Update

- 3 The Final budget report presented at the March 2015 Forum showed an outturn position of (£807k) as at the end of March 2016. The forecast as at the end of February is (£1,139k) having seen a £331k improvement since last Forum.

This improvement has removed the expected in year deficit. The budget agreed by Forum anticipated an overspend of £659k this is now anticipated to be a £157k underspend during the financial year 2015/16

The material forecast movements are highlighted below.

| | | | |
|---|--|---------|---------|
| 4 | Material movements | £'000's | £'000's |
| | Budgeted deficit / (surplus) | | (807) |
| | Position reported at last Forum (January 2016) | | (808) |

| | |
|---|-------|
| Schools Block Allocation excl Academies net of de-delegated funds excluding HNB allocations | (283) |
| High Needs Block allocations | 154 |
| School-specific contingencies | 96 |
| Early Years Contingency | (41) |
| Provision for pupils with SEN (including assigned resources) | (228) |
| Support for inclusion | (103) |
| Pupil growth/ Infant class sizes | 105 |
| Insurance | 29 |
| School admissions | (14) |
| Licences/subscriptions | (77) |
| Early Years Block 3-4 year olds Grant | 31 |
| | (331) |

Forecast Carry forward deficit/ (surplus) to 16/17 (1,139)

- .05 £283k was refunded to the DSG due to the 80% tax relief granted to Waingels College upon its' conversion to charitable status.
 £154k overspend in the High Needs Block allocations netted against the £228k saving in the provision for pupils with SEN; this is due to pupils attending Southfields rather than being in a resource base, and an increase in the number of Wokingham pupils in Southfields requiring top ups.

£96k in year rate revaluations completed.

£41k underspend on 3 & 4 year old funding; the base rate for 2016/17 has been increased by 3p to ensure this underspend is not ongoing.

£103k support for inclusion this saving has been achieved due the the Family Support Workers who were originally contracted to the end of March 2016 leaving their posts during December, January and February. There is no further costs anticipated in connection with this team.

£105k forecasted additional requirements due to further expansion of the primary place planning.

£29k increase in central insurance costs

£14k savings in school admissions team – though agency costs may be incurred during March to backfill the position.

£77k A purchase order had been raised for a license that is not due for payment until the 1/4/16; therefore this amount has been pushed into next year.

£31k grant was received on the 19/2/16 for 2 year old funding following the January census. A further amendment is expected in July for this financial year following the May census.

Donna Munday
Schools Finance Manager,
March 2016

Schools Budget

08 March 2016

| Actual 2012-13 | 2013-14 Latest | 2014-15 Latest | 2015-16 | | | All Schools | Maintained | Academies | High Needs | Early Years | Pupil Premium | 2016-17 | | | | |
|-------------------|-------------------|-------------------|--------------|----------------|-------------------------------|----------------|--|----------------|--------------|----------------|------------------|-----------------|---------------|---------------|--------------|--------------|
| | | | Budget | Variance | Feb-16 | | | | | | | cf Jan16 | Budget | | | |
| INCOME | | | | | | | | | | | | | | | | |
| 92,391 | 92,932 | 68,118 | 2.2% | | Maintained Schools Block | 69,637 | -5.8% | 65,604 | | | | | -2.5% | 63,980 | | |
| | 333 | 533 | -53.1% | | Additional Schools Grant | 250 | 0.0% | 250 | 250 | | | | 0.0% | 250 | | |
| | | 19,872 | 11.9% | | Academy Recoupment | 22,241 | 18.1% | 26,274 | | | 26,274 | | 10.4% | 28,999 | | |
| | | 17,588 | 0.4% | | High Needs Block | 17,656 | -4.9% | 16,794 | | | 16,794 | | 1.8% | 17,092 | | |
| | | 6,373 | -1.5% | | Early Years Block | 6,276 | 8.0% | 6,780 | | | | 6,780 | -0.5% | 6,749 | | |
| | | | | | Early Years Block 2 year olds | 391 | | 0 | | | | 0 | | 0 | | |
| | | 1,298 | 0.0% | | Universal Infant FSM | 1,298 | 69.1% | 2,195 | | | | 2,195 | 0.0% | 2,195 | | |
| 6,226 | 4,658 | 4,384 | -8.8% | | Education Funding Agency | 4,000 | -11.8% | 3,529 | | | 3,529 | | -9.6% | 3,191 | | |
| 1,237 | 1,913 | 2,735 | 9.7% | | Pupli Premium Grant 5-16 | 3,000 | -12.6% | 2,622 | | | | 2,622 | 2.5% | 2,688 | | |
| | | | | | Pupli Premium Grant 3-4 | 56 | 0.0% | 56 | | | | 56 | 0.0% | 56 | | |
| 99,854 | 99,836 | 120,901 | 3.2% | | TOTAL FUNDING | 124,805 | -0.6% | 124,104 | 250 | 69,133 | 26,274 | 16,794 | 8,975 | 2,678 | | |
| OUTGOINGS | | | | | | | | | | | | | | | | |
| 84,944 | -13.8% | 73,264 | -2.8% | 71,195 | 1.7% | 1.0.1 | Schools Block excluding Academies | 72,382 | -7.4% | 67,010 | | 67,010 | | -3.5% | 64,683 | |
| | | | | 19,872 | 11.9% | 1.0.1 | Academy Recoupment | 22,241 | 18.1% | 26,274 | | 26,274 | | 10.4% | 28,999 | |
| | | 6,328 | 11.4% | 7,052 | -12.3% | 1.0.1 | High Needs Block allocation (across all schools) | 6,187 | 2.5% | 6,341 | | 6,341 | | 7.3% | 6,807 | |
| | | 1,880 | 41.6% | 2,663 | 9.8% | 1.0.1 | Pupil Premium (exc Academies) | 2,925 | -12.9% | 2,547 | | | 2,547 | 2.6% | 2,613 | |
| | | | | 1,298 | 0.0% | 1.0.1 | Universal Infant FSM | 1,298 | 69.1% | 2,195 | | | 2,195 | 0.0% | 2,195 | |
| 3,983 | 46.5% | 5,835 | 4.3% | 6,087 | 5.8% | 1.0.1a | Early Years Block allocation | 6,438 | 0.0% | 6,438 | | 6,438 | | 1.3% | 6,520 | |
| 88,927 | -1.8% | 87,307 | 23.9% | 108,167 | 3.1% | | Total ISB and PVI allocations | 111,471 | -0.6% | 110,805 | 67,010 | 26,274.4 | 6,341 | 8,633 | 2,547 | |
| 22 | 18.2% | 26 | 88.5% | 49 | 2.0% | 1.0.2 | Pupil Premium mainstream | 50 | 0.0% | 50 | | | 50 | 0.0% | 50 | |
| 34 | -47.1% | 18 | 27.8% | 23 | 8.7% | 1.0.3 | Pupil Premium non-mainstream | 25 | 0.0% | 25 | | | 25 | 0.0% | 25 | |
| | | | | | | | Pupil Premium 3-4 years | | | 56 | | | 56 | 0.0% | 56 | |
| 172 | | 0 | | 184 | 24.5% | 1.1.3 | Early Years contingency | 229 | -17.9% | 188 | | | 188 | 21.8% | 229 | |
| 1,433 | 22.3% | 1,752 | 33.7% | 2,343 | -3.2% | 1.2.1 | Provision for pupils with SEN (actual charges) | 2,268 | -10.6% | 2,028 | | 2,028 | | 21.7% | 2,468 | |
| 110 | 5.5% | 116 | -3.4% | 112 | -10.7% | 1.2.2 | Provision for pupils with SEN (additional charges) | 100 | -80.0% | 20 | | 20 | | 0.0% | 20 | |
| 4,931 | 5.1% | 5,182 | 9.1% | 5,655 | 2.5% | 1.2.4 | Fees for Independent Special Schools | 5,794 | -3.8% | 5,575 | | 5,575 | | -5.6% | 5,262 | |
| | | | | | | | Element 2 funding for post 16 | 546 | | 0 | | | | | 0 | |
| 230 | 0.0% | 230 | 0.0% | 230 | 0.0% | 1.2.5 | SEN transport | 230 | 0.0% | 230 | | 230 | | 0.0% | 230 | |
| -1,605 | | -46 | | 0 | | 1.2.7 | Inter-authority recoupment | 0 | | 0 | | | | 0 | | |
| 712 | -35.4% | 460 | -18.0% | 377 | 32.6% | 1.3.1 | Pupil Referral Units | 500 | 31.2% | 656 | | 656 | | -26.8% | 480 | |
| 485 | 27.4% | 618 | 2.1% | 631 | -4.9% | 1.3.3 | Education out of school | 600 | 0.0% | 600 | | 600 | | 2.8% | 617 | |
| 582 | | 0 | | 0 | | 1.3.4 | 14-16 More practical learning options | 0 | | 0 | | | | 0 | | |
| 425 | 128.9% | 973 | -41.1% | 573 | 0.7% | 1.2.3 | Support for inclusion | 577 | -20.5% | 459 | | 459 | | -21.1% | 362 | |
| | | | | 100 | 50.0% | 1.2.1 | Moderating panels | 150 | 0.0% | 150 | | 150 | | 0.0% | 150 | |
| | | 91 | | 0 | | 1.4.5 | Carbon reduction allowances | 0 | | 0 | | | | 0 | | |
| 223 | | 0 | | 0 | | 1.5.1 | School meals (nursery, primary, special) | 0 | | 0 | | | | 0 | | |
| 0 | | 0 | | 0 | | 1.5.2 | FSM eligibility | 0 | | 0 | | | | 0 | | |
| 413 | | -152 | | 103 | | 1.5.4 | School kitchens (repairs and maintenance) | 0 | | 0 | | | | 0 | | |
| 92 | -19.6% | 74 | 21.6% | 90 | 2.2% | 1.6.5 | Miscellaneous | 92 | 0.0% | 92 | | 92 | | 5.4% | 97 | |
| | | 32 | 0.0% | 32 | 0.0% | 1.1.2 | NQT induction | 32 | 0.0% | 32 | | 32 | | 0.0% | 32 | |
| 568 | 1.8% | 578 | -2.2% | 565 | -1.2% | 1.6.1 | Insurance | 558 | 5.2% | 587 | | 558 | | -0.2% | 586 | |
| 272 | 4.0% | 283 | -2.5% | 276 | 1.8% | 1.6.3 | School admissions | 281 | -5.0% | 267 | | 267 | | 5.2% | 281 | |
| 4 | 0.0% | 4 | 0.0% | 4 | 0.0% | 1.6.6 | Servicing of Schools Forum | 4 | 0.0% | 4 | | 4 | | 0.0% | 4 | |
| 744 | -63.2% | 274 | 10.2% | 302 | -56.3% | 1.1.2 | School specific contingencies | 132 | 184.1% | 375 | | 375 | | -9.3% | 340 | |
| 619 | -21.3% | 487 | -34.1% | 321 | 0.0% | 1.3.2 | Behavioural Support Services | 321 | 0.0% | 321 | | 321 | | 0.0% | 321 | |
| 134 | -8.2% | 123 | 10.6% | 136 | 7.4% | 1.4.1 | Support for ethnic minority and bilingual | 146 | 0.0% | 146 | | 146 | | 0.0% | 146 | |
| | | 639 | -4.4% | 611 | 25.2% | 1.4.10 | Pupil growth / infant class sizes | 765 | -8.5% | 700 | | 700 | | 76.0% | 1,232 | |
| 191 | 26.2% | 241 | 2.5% | 247 | -9.3% | 1.6.4 | Licenses / subscriptions | 224 | -5.4% | 212 | | 212 | | 59.9% | 339 | |
| 415 | -4.8% | 395 | 0.3% | 396 | -6.8% | 1.6.7 | Staff costs - supply cover | 369 | 0.0% | 369 | | 369 | | 0.0% | 369 | |
| 11,206 | 10.6% | 12,398 | 7.8% | 13,360 | 4.7% | | Total Central Expenditure | 13,993 | -6.1% | 13,142 | 1,092 | 1,692 | 0 | 10,039 | 188 | 131 |
| 100,133 | -0.4% | 99,705 | 21.9% | 121,527 | 3.2% | 1.8.1 | TOTAL SCHOOLS BUDGET | 125,464 | -1.2% | 123,947 | 1,092 | 68,702 | 26,274 | 16,380 | 8,821 | 2,678 |
| -279 | | 131 | | -626 | | | Surplus / Deficit | -659 | | 157 | -842 | 431 | -0 | 414 | 154 | 0 |
| 1,752 | | 1,475 | | 1,607 | | | Reserves b/fwd | 982 | | 982 | | | | | | 1,139 |
| 1,473 | | 1,606 | | 981 | | | Reserves c/fwd | 323 | | 1,139 | | | | | | 826 |

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SCHOOLS FORUM

Fourth Draft Schools Budget 2016/17

Purpose of the Report

- 1 The purpose of this report is to consider a Schools Budget for 2016/17 found in Appendix A

Suggested Action

- 2 Members are asked to consider and comment upon the attached budget (Appendix A), and agree the recommendation in para 0.4

3 Revisions made since last forum

As per Forums request at the January Forum, the third draft has been revised to reach the agreed £500k carried forward balance (£497 in reality). From this new baseline the following adjustments have been made.

1. A contribution of £25k has been ringfenced to accommodate the pre-opening costs incurred ahead of the ASD unit opening at St Crispins.
2. Budget has been transferred from Support for Inclusion to the general provision for pupils with SEN. Support for Inclusion no longer has the cost of running the Parent Support Workers and the staff saving made in 2015/16 is on going. The £200k transferred will be used to (where agreed as part of the Alternative Provision Review) pay for Resource Unit top ups, and changes in special school pupil age ranges and profiles.
3. The Foundry College Budget has been reduced by 2% in line with the impact being felt by other schools and academies across the borough.
4. There has been a £5k increase in the cost of inspections of Kilns at Secondary schools.
5. The carried forward figure has been amended in line with the budget monitoring position as at the end of January 2016.

The amount forecasted to be surplus at the end of March 2017 is now expected to be £838,000.

4 Recommendation

To adopt the Budget found in Appendix A

**Donna Munday
Schools Finance Manager
February 2016**

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Schools Budget 2016/17

| S251 line no. | S251 title | FINAL Budget 2015/16 | Third draft agreed at January Forum | Fourth draft agreed at February Forum |
|---------------|---|----------------------|-------------------------------------|---------------------------------------|
| | SB | | | |
| 1.0.1 | Schools Block Allocation excl Academies net of de-delegated funds including HNB allocations | 68,382 | 61,492 | |
| | 6th form funding from EFA | 4,000 | 3,191 | |
| | Academy Recoupment from Schools Block | 22,241 | 28,999 | |
| | UIFSM Revenue / Start Up | 1,298 | 2,195 | |
| | HNB | | | |
| 1.0.1. | High Needs Block allocations | 6,187 | 6,782 | |
| 1.0.1. | Pupil Premium excl Academies | 2,925 | 2,613 | |
| | EY | | | |
| 1.0.1a | Early Years Block Allocation - inc exp for Education of Children under 5s in Private/voluntary/independent settings | 6,438 | 6,520 | |
| | Total ISB and PVI allocations | 111,471 | 111,792 | |
| 1.0.2 | Pupil Premium allocated to schools - mainstream | 50 | 50 | |
| 1.0.3 | Pupil Premium in non-mainstream settings | 25 | 25 | |
| | Pupil Premium 3-4 years | - | 56 | |
| | De-delegated in 2013/14 | | | |
| | EY | | | |
| | HNB | | | |
| 1.1.2 | School-specific contingencies | 132 | 340 | |
| | NQT Induction | 32 | 32 | |
| 1.1.3 | Early Years Contingency | 229 | 229 | |
| 1.2.1 | Provision for pupils with SEN (including assigned resources) | 2,268 | 2,268 | |
| 1.2.1 | Moderating Panels | 150 | 150 | |
| 1.2.2 | Provision for pupils with SEN, provision not included in line 1.2.1 | 100 | 20 | |
| 1.2.3 | Support for inclusion | 577 | 562 | |
| 1.2.4 | Fees for pupils at independent special schools & abroad | 5,794 | 5,262 | |
| | Element 2 funding for post 16 | 546 | - | |
| 1.2.5 | SEN transport | 230 | 230 | |
| 1.2.7 | Inter-authority recoupment | | | |
| 1.3.1 | Pupil Referral Units | 500 | 500 | |
| | De-delegated in 2013/14 | | | |
| 1.3.2 | Behaviour Support Services | 321 | 321 | |
| 1.3.3 | Education out of school | 600 | 617 | |
| | De-delegated in 2013/14 | | | |
| 1.4.1 | Support to under-performing ethnic minority groups and bilingual learners | 146 | 146 | |
| | SB | | | |
| 1.4.10 | Pupil growth/ Infant class sizes | 765 | 1,232 | |
| 1.5.4 | School kitchens - repair and maintenance | - | - | |
| | De-delegated in 2013/14 | | | |
| 1.6.1 | Insurance | 558 | 586 | |
| 1.6.3 | School admissions | 281 | 281 | |
| | De-delegated in 2013/14 | | | |
| 1.6.4 | Licences/subscriptions | 224 | 339 | |
| 1.6.5 | Miscellaneous (not more than 0.1% total of net SB) | 92 | 92 | |
| 1.6.6 | Servicing of schools forums | 4 | 4 | |
| | De-delegated in 2013/14 | | | |
| 1.6.7 | Staff costs - supply cover (not sickness) | 369 | 369 | |
| | Total Central Expenditure | 13,993 | 13,711 | |
| 1.8.1 | TOTAL SCHOOLS BUDGET | 125,464 | 125,503 | |
| DSG | Schools Block Allocation | 91,878 | 92,979 | |
| DSG | High Needs Block | 17,656 | 17,092 | |
| DSG | Early Years Block 3-4 year olds | 6,276 | 6,749 | |
| | Dedicated Schools Grant Total | 115,810 | 116,820 | |
| DSG | Academy Recoupment from Schools Block | 22,241 | 28,999 | |
| DSG | Maintained Schools Block | 69,637 | 61,242 | |
| DSG | Early Years Block 2 year olds | 391 | 0 | |
| DSG | Additional School Grants | 250 | 250 | |
| DSG | UIFSM Revenue | 1,298 | 2,195 | |
| EFA | Education Funding Agency 6th Form Funding | 4,000 | 3,191 | |
| EFA | Pupil Premium 5-16 years | 3,000 | 2,688 | |
| DSG | Pupil Premium 3-4 years | 56 | 56 | |
| | TOTAL FUNDING | 124,805 | 125,200 | |
| | Total in-year (surplus)/ deficit | 659 | 303 | |
| | Brought Forward (surplus) /Deficit balance | (1,466) | (800) | |
| | TOTAL YEAR-END (SURPLUS)/DEFICIT | (807) | (497) | |

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SCHOOLS FORUM

Report on Independent School Placements

Purpose of the Report

- 1 Update to Forum on spend to Independent school placements

Suggested Action

- 2 As per Donna Munday's reporting

Supporting Information

3 Background

- Since the last update 2 of the 3 placements into ASD special school have been agreed - £129K per annum
 - One girl placed into special SEMH placement - £66K per annum
- Additional cost of placements above - £195K per annum

Current searches

- Year 8 SEMH 38 week residential special school placement
- Three girls awaiting special school placement (SEMH) – 1 already within ISS budget
- Year 9 student awaiting special SEMH/ASD day placement
- Year 9 student from Addington - Independent special school search, costs increased and circa to be £140K for 38 week residential tripartite joint funding

4 **Current position**

Number of Year 8/9 placements unstable within mainstream secondary schools with Moderate Learning Difficulties. Schools struggling to match a suitable curriculum offer appropriate to their needs. By Year 8/9 lack of maintained special school options. SEN working with schools to identify alternative curriculum packages funded within DSG High Needs Budget.

5 **Proposal for future**

2016/17 – Known new starters and Leavers

| Starters Sept 2016 | Cost | Leavers 2016 | Cost |
|--|--------------|---------------------------------|--------------|
| ASD special day school | £69K | Alternative Provision | £26K |
| SpLD special day school | £20K | SEMH special residential | £38K |
| ASD special day school | £34K | ASD/SEMH special residential | £80K |
| Post 16 starters | | Post 16 leavers | |
| SEMH special x 2 Social care placements | £50K | ASD special 52 week residential | £150K |
| | | ASD special day school | £38K |
| Others known | | | |
| PD special school | £120K | | |
| HI special school | £40K | | |
| TOTAL | £333K | TOTAL | £332K |

Recommendation

6 As per Donna Munday's reporting

| | |
|--------------|------------------|
| Authors Name | Linda Orr |
| Position | SEN Team Manager |
| Date | 15.02.16 |

SCHOOLS FORUM

Benchmarking Report

Purpose of the Report

- 1 To give School Forum Members statistical information to allow consideration to be given to benchmarking. Unless stated otherwise the data relates to 2015/16 budgets. This can be helpful in terms of informing future decisions being made by Schools Forum and in understanding our context locally.

Suggested Action

- 2 Members are asked to consider and note the information contained herewithin.

Areas Considered

3 Formula Factors

Wokingham AWPU's

| | GUF | Primary | KS3 | KS4 | Ratio |
|-----------------|---------|---------|---------|---------|--------|
| 2009/10 | N/A | £ 2,372 | £ 2,921 | £ 3,477 | |
| 2010/11 | N/A | £ 2,460 | £ 3,031 | £ 3,608 | 1:1.28 |
| 2011/12 | N/A | £ 2,543 | £ 3,114 | £ 3,707 | 1:1.28 |
| 2012/13 | 4127 | £ 2,539 | £ 3,179 | £ 3,784 | 1:1.28 |
| 2013/14* | £ 4,127 | £ 3,053 | £ 3,601 | £ 4,360 | 1:1.28 |
| 2014/15 | £ 4,127 | £ 2,749 | £ 3,638 | £ 4,548 | 1:1.28 |
| 2015/16 | £ 4,155 | £ 2,714 | £ 3,712 | £ 4,200 | 1:1.27 |
| 2016/17 | £ 4,155 | £ 2,781 | £ 3,785 | £ 4,273 | 1:1.27 |

* Indicates first step change to National Funding Formula

Wokingham compared to other Berkshire Unitaries

| AWPU | Primary | KS3 | KS4 |
|------------------------|---------|---------|---------|
| Bracknell Forest | £ 2,843 | £ 4,067 | £ 4,067 |
| Reading | £ 3,226 | £ 3,950 | £ 4,504 |
| Slough | £ 3,180 | £ 3,879 | £ 4,636 |
| West Berkshire | £ 2,937 | £ 4,364 | £ 4,364 |
| Windsor and Maidenhead | £ 2,880 | £ 3,950 | £ 4,502 |
| Wokingham | £ 2,714 | £ 3,712 | £ 4,200 |

| | Deprivation Funding | LAC Amount Per Pupil (£) | EAL Primary Amount Per Pupil (£) | EAL Secondary Amount Per Pupil (£) |
|------------------------|----------------------------|---------------------------------|---|---|
| Bracknell Forest | £ 2,456,475 | £ 212 | £ 239 | £ 239 |
| Reading | £ 5,221,618 | £ - | £ 699 | £ 1,410 |
| Slough | £ 13,771,722 | £ - | £ - | £ - |
| West Berkshire | £ 3,174,037 | £ - | £ 345 | £ 345 |
| Windsor and Maidenhead | £ 3,062,342 | £ 1,900 | £ 323 | £ 988 |
| Wokingham | £ 2,423,157 | £ 900 | £ 247 | £ 1,236 |

| | Mobility total (£) | Prior Attainment Primary total (£) | Prior Attainment Secondary total (£) | Rates Total (£) |
|------------------------|---------------------------|---|---|------------------------|
| Bracknell Forest | £ 20,295 | £ 934,165 | £ 1,141,699 | £ 1,372,940 |
| Reading | £ 72,030 | £ 1,814,039 | £ 1,242,801 | £ 685,863 |
| Slough | £ - | £ 4,774,512 | £ 3,974,975 | £ 1,099,832 |
| West Berkshire | £ - | £ 880,743 | £ 2,261,869 | £ 989,330 |
| Windsor and Maidenhead | £ - | £ 2,687,832 | £ 2,337,059 | £ 969,060 |
| Wokingham | £ 145,488 | £ 828,387 | £ 2,039,808 | £ 1,614,914 |

| | Primary Lump Sum (£) | Secondary Lump Sum (£) | Primary /Secondary Ratio |
|------------------------|-----------------------------|-------------------------------|---------------------------------|
| Bracknell Forest | £ 160,000 | £ 170,000 | 1 : 1.35 |
| Reading | £ 48,480 | £ 48,480 | 1 : 1.27 |
| Slough | £ 55,000 | £ 55,000 | 1 : 1.38 |
| West Berkshire | £ 126,400 | £ 126,400 | 1 : 1.28 |
| Windsor and Maidenhead | £ 123,738 | £ 125,155 | 1 : 1.27 |
| Wokingham | £ 175,000 | £ 175,000 | 1 : 1.27 |

4 High Needs Block

Data below has been taken from the CIPFA Special Educational Needs report and relates to financial year 2014/15, figures are as at 31st March 2015.

Day Pupils

Average cost per week by SEN Categories



| Category | Code | Wokingham | | All Authorities | |
|--|---------|-----------|--------|-----------------|--------|
| | | No. | £/week | No. | £/week |
| Specific Learning Difficulty | SpLD | 4 | £742 | 95 | £548 |
| Moderate Learning Difficulty | MLD | 0 | na | 170 | £643 |
| Severe Learning Difficulty | SLD | 3 | £358 | 124 | £1,065 |
| Profound and Multiple Learning Difficulty | PMLD | 0 | na | 62 | £1,045 |
| Behaviour, Emotional and Social Difficulty | BESD | 5 | £1,449 | 746 | £1,000 |
| Speech, language and Communication Needs | SLCN | 1 | £489 | 292 | £754 |
| Autistic Spectrum Disorder | ASD | 12 | £1,584 | 956 | £1,139 |
| Visual Impairment | VI | 0 | na | 23 | £1,245 |
| Hearing Impairment | HI | 0 | na | 55 | £882 |
| Multi-Sensory Impairment | MSI | 0 | na | 9 | £990 |
| Physical Disability | PD | 0 | na | 84 | £836 |
| Other | Other | 0 | na | 43 | £674 |
| Unknown | Unknown | 0 | na | 103 | £531 |
| All Pupils | | 25 | | 2,762 | |

Boarding Pupils Average cost per week by SEN Categories



| Category | Code | Wokingham | | All Authorities | |
|--|---------|-----------|--------|-----------------|--------|
| | | No. | £/week | No. | £/week |
| Specific Learning Difficulty | SpLD | 1 | £671 | 21 | £611 |
| Moderate Learning Difficulty | MLD | 0 | na | 34 | £2,456 |
| Severe Learning Difficulty | SLD | 1 | £3,558 | 52 | £3,089 |
| Profound and Multiple Learning Difficulty | PMLD | 0 | na | 31 | £3,142 |
| Behaviour, Emotional and Social Difficulty | BESD | 3 | £2,269 | 228 | £2,868 |
| Speech, language and Communication Needs | SLCN | 1 | £631 | 72 | £1,624 |
| Autistic Spectrum Disorder | ASD | 5 | £4,158 | 281 | £2,734 |
| Visual Impairment | VI | 0 | na | 15 | £929 |
| Hearing Impairment | HI | 0 | na | 67 | £974 |
| Multi-Sensory Impairment | MSI | 0 | na | 2 | £1,255 |
| Physical Disability | PD | 0 | na | 34 | £1,760 |
| Other | Other | 0 | na | 14 | £2,895 |
| Unknown | Unknown | 0 | na | 141 | £1,905 |
| All Pupils | | 11 | | 992 | |

5 Local Economic Context

Reading – Having started the year with a £1.3m underspend (2 year old funding related) they are currently forecasting a £2million overspend.(in their HNB). They are taking action to recover this amount from their 2016/17 Schools Block budget. They have reduced all their formula factors by 1.5% and are setting aside any surplus to their growth fund

West Berkshire - Having started the year with a £149k underspend (Schools Block funding) they are currently forecasting a £1.9million overspend (in their HNB). They are taking action to recover this amount from their 2016/17 Schools Block budget. To recover this amount in 2016/17 they have reduced their Lump Sum and transferred this saving to their HNB along with their Schools Block underspend. They have also reduced the rates of their Special Schools by 1.5%

Royal Borough of Windsor & Maidenhead – Have moved their Schools Block surplus into their HNB in order to reduce the overspend in this area. They have kept all of their 2015/16 factor rates at the same level for 2016/17

Slough – They have increased their Lump Sums to the maximum of £175,000 for both Primary and Secondary, they have reduced their Secondary AWPU's and reduced their primary / secondary ratio from 1:1.38 to 1:1.33

Bracknell Forest – Started the year with a surplus carried forward of £208k, having moved £2m from their schools block budget to support their HNB. Bracknells' Borough Treasurer considers that the Schools Budget should be run at a £0.510m surplus in order to meet any unforeseen events. Bracknell are not in a position to meet this having set an in year deficit of £231k. They continue to keep their formula rates at the same level as last year.

Above information has been collated from the published Schools Forum documents found on each Local Authority's website.

Donna Munday
Schools' Finance Manager
February 2016

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WOKINGHAM BOROUGH COUNCIL

Primary School Planning Strategy 2016-2018

| Version | Date |
|---------|----------|
| 3.1 | 5/8/15 |
| 3.2 | 6/8/15 |
| 4.0 | 27/10/15 |
| 5.0 | 17/11/15 |
| 6.1 | 09/12/15 |

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Key recommendations

1. To provide additional capacity through school expansion and early opening of new provision in three priority areas, in accordance with the related implementation plan for 2016/17:
 - a. Earley (up to 315 places)
 - b. Woodley (up to 315 places)
 - c. South West (up to 210 places)
2. To support the development of new schools in the four Strategic Development Locations in a timely manner to meet needs generated by these developments with capacity to expand to create additional places if required.
3. To ensure that new school development considers and supports the wider agenda around education, school standards, childcare, sustainability, family and community support and community services.

Introduction

This strategy establishes how Wokingham will meet its statutory duty that is to ensure there are sufficient primary school places for the period 2015 to 2018 and sets out plans to meet longer term needs generated by new housing development: It sets out to:

- Ensure school places are available within walking distance of home
- To meet the primary education needs of the new Strategic Development Location communities as established in the Council's Core strategy
- To create sustainable, high quality provision.

Where shortfalls are predicted proposals have been identified. The process of determining and implementing the action plan is through consultation with schools, parents, residents and other stakeholders. A member's working party, an Earley parents' group and local school clusters have helped shape this strategy. In addition costs and logistical issues such as traffic congestion and parking are also being taken into consideration.

Overarching these objectives is a priority set out in the Children and Young People Plan that says that the Wokingham Borough Council should:

“Ensure more Wokingham children have access to good or better schools and settings and focus on delivering improvements for those most at risk of poor outcomes through our school improvement offer and delivery of new Primary and Secondary provision (WBC 2014).”

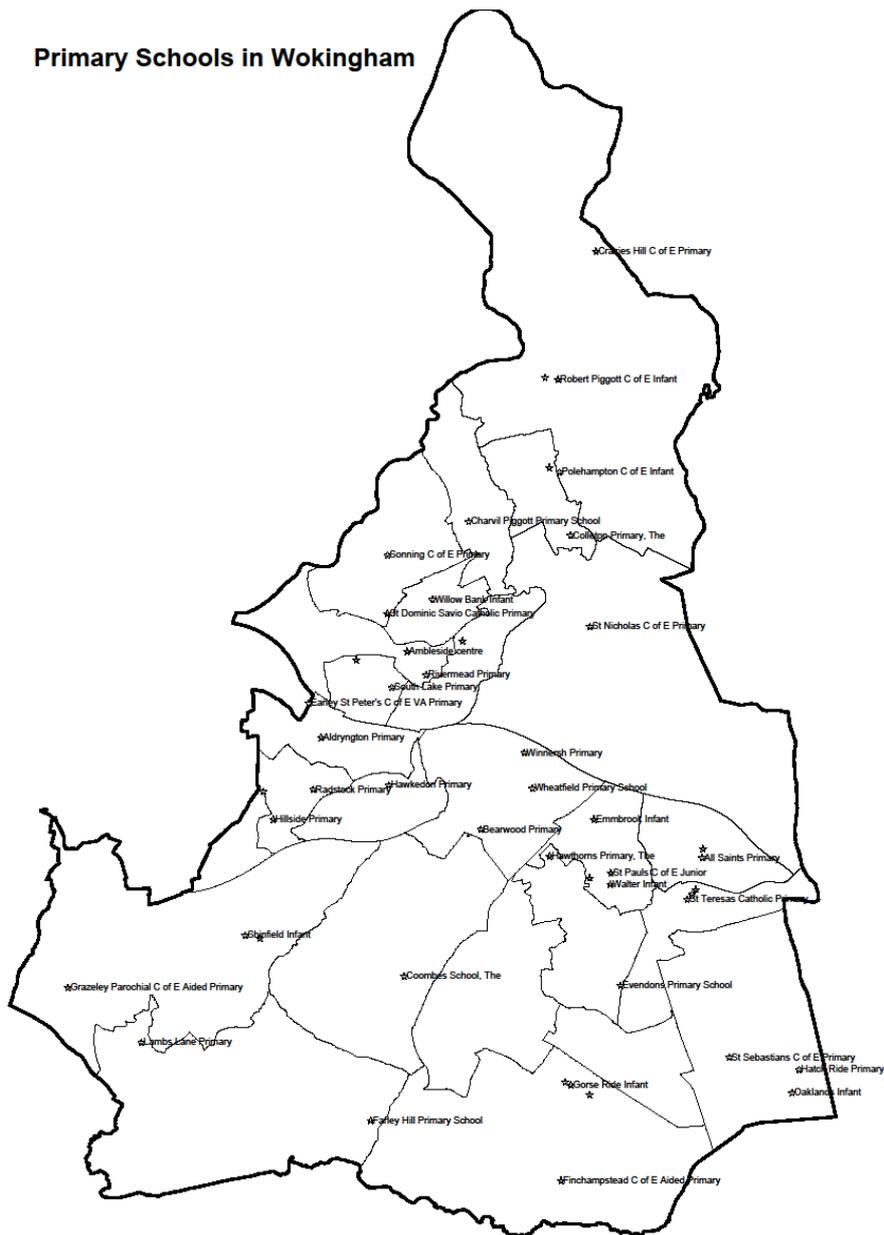
Activity supporting the development of the strategy

Options and recommendations have been derived through the examination of roll projections, demographic data and projections and a range of other relevant data sources. These have been used to predict the number of children that will require primary school places over the life of the strategy. Highway planning was consulted to identify traffic congestion issues and help devise solutions to problems caused by school expansion. The WBC Operational Property and Strategic Assets teams have provided expertise and knowledge regarding the viability of expansion of existing sites and potential new sites. Discussions have taken place with some schools to identify the appetite for expansion.

Overview

Current Provision

There are in total 50 primary schools in the borough. The map below shows the dispersal of the schools. The Woodley planning area has the highest number of primary schools 9, and Wokingham-East planning area has the lowest number of schools 5. The average number of primary schools per planning area is 7.



Primary Schools in Wokingham
Borough

| Planning area | Number of Schools |
|---------------------|-------------------|
| Earley | 7 |
| North | 8 |
| South-East | 8 |
| South-West | 6 |
| Wokingham Town East | 5 |
| Wokingham Town West | 7 |
| Woodley | 9 |
| Total | 50 |

Recent activity

There have been a number of schemes to increase primary school capacity in the last five years, prior to the adoption of the previous provision strategy (2013 to 2016). These included:

- In the south west two bulge classes were created at Lambs Lane Primary.
- In Wokingham Town two bulge classes were created at Winnersh Primary School and 50 places were provided at Hawthorns Primary school.
- In the North planning area two bulge classes were created at the Colleton Primary School originally and subsequently the school expanded to offer 420 places (from 245 places)
- In Earley Hawkedon Primary School expanded from 490 to 630 places.

The Wokingham Primary School Provision 2013-2016 strategy identified pressures in the south-west and north of the borough as well as west and east of Wokingham Town. In the north a new primary school was built in Charvil (part of Piggott School, which changed its age range from 11 to 18 to 4 to 18). In Wokingham Town West two new one form entry primary (210 places) schools were opened: Windmill in Woosehill and Wheatfield in Winnersh. In the south west the expansion of Grazeley Parochial CoE VA Primary School (from 105 to 210 places) and the Shinfield Infant and Shinfield St Mary Junior School (jointly from 420 to 630 offered places) was agreed (and work is currently in progress).

Expansion in the south-west was successful and the prediction that the bulge was required has been justified with just 26 places left available from reception year to year 3 with the total figure for empty places being 7% of the total number of places. In the North there is a similar story although there are fewer places left over in the North (4% of the total number of places) which is 1% less than the 5% recommended by the DfE. Wokingham Town West schools filled their new classes in the Reception year through to year 3 with only 23 places left over. Wokingham Town East shows more places available than the other areas expanded but all schools but one were filled. Only All Saints Primary failed to fill every year group except for in the Reception year where they were just 3 short of full capacity.

Seven new schools are also proposed as core components of the agreed masterplans for the borough's "Strategic Development Locations" (North (1) and South Wokingham (2), South of the M4 (2) and Arborfield (2)). Five of these schools are incorporated into planning consents through Section 106 (developer) agreements. The sites for the second schools in the South Wokingham and Arborfield developments are expected to be the subject of S106

agreements when planning consents are awarded with construction costs met by CIL (Community Infrastructure Levy) funding.

Statutory drivers

Education Act 1996

Key act establishing the duty on local authorities to ensure that sufficient school places are available to meet local needs.

Section 13 General responsibility for education: England and Wales

“A local education authority shall (so far as their powers enable them to do so) contribute towards the spiritual, moral, mental and physical development of the community by securing that efficient primary education, and secondary education are available to meet the needs of the population of their area.”

Academies Act 2010

This Act that sets out the framework for the delivery of new schools through the development of Academies and Free Schools.

Existing schools (including maintained schools) can expand to meet needs. However, any new school required to meet needs created rising school rolls will be a Free School (an Academy). These schools will be brokered by the Council and initial start-up funding and capital costs will be met by the Council. However, they will be agreed by the Regional School's Commissioner acting on behalf of the Secretary of State for Education and funded directly by the DfE.

School Admissions Code 2014

This Code enforces mandatory requirements and includes guidelines setting out aims, objectives and other matters in relation to the provision of admissions.

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/389388/School_Admissions_Code_2014_-_19_Dec.pdf

Admissions arrangements determine who will have priority for school places should a school be oversubscribed. Where Wokingham has funded new provision to meet area needs the expectation will be that oversubscription criteria will give priority to the local community. Faith schools can have criteria that give priority to children whose families can demonstrate adherence to a faith and so not provide places (or all their places) to local communities.

Wokingham objectives

The primary purpose of any primary place provision strategy is to ensure there are sufficient places available in convenient places. However, to be fully successful any strategy needs to take account of:

- School standards – intending to create schools that are excellent educationally and sustainable financially.
- Local community needs – where possible creating facilities that have a dual role – serving the community outside school hours.
- Local community concerns – minimising adverse impacts such as school run traffic issues.

Issue analysis

“Priority area” analysis has been gathered using live birth data patterns, local knowledge concerning: new homes in the borough’s Strategic Development Locations (WBC (2015) Regeneration), future housing development, cross border movement and demographics of those migrating into the borough.

The results of this analysis show that: the South West (Shinfield Parish), Earley and Woodley planning areas are the areas that require new provision.

The Department for Education recommend that authorities should aim for 5% of unfilled places in schools. Chart 2 shows that on average Wokingham Borough have just 3% of unfilled places. Year 1 and Year 2 have the least amount of tolerance and Year 5 and year 6 have the most tolerance. This can be explained by the year on year increase in birth rate that started over 7 years ago and is now progressing through our schools.

2015/16 Wokingham Surplus Capacity by Year (at November 2016)

| Year | Reception | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 |
|------------------|-----------|--------|--------|--------|--------|--------|--------|
| Places Available | 2191 | 2161 | 2131 | 2101 | 2057 | 2057 | 2053 |
| Surplus | 50 | 21 | 86 | 52 | 61 | 136 | 150 |
| %ge Surplus | 2% | 1% | 4% | 2% | 3% | 7% | 7% |
| Whole borough | 4% | | | | | | |

Below is a summary of the number of available places in each planning area compared to the total number of places.

| | Available Places | Total Places | %ge unfilled places |
|---------------------|------------------|--------------|---------------------|
| Earley | 3115 | 8 | 0% |
| North | 1820 | 75 | 4% |
| South East | 1687 | 74 | 4% |
| South West | 1785 | 164 | 9% |
| Wokingham Town West | 2590 | 60 | 2% |
| Wokingham Town East | 1820 | 76 | 4% |
| Woodley | 2520 | 99 | 4% |
| Total | 15337 | 556 | 4% |

Admissions – satisfying preferences

The allocation of placements for 2015 were as follows:

- 85% of applicants received their first preference (1 per cent lower than 2014), and
- 96% of applicants received one of their four preferred schools (2 per cent lower than 2014).
- 98 per cent were allocated to schools within the borough (an increase of 4 per cent).

In 2015 there were almost double the numbers of school admission appeals compared to 2014. An appeal can be made if a child hasn't been offered a place at a school of preference. The increase in appeals is not localised to a single planning area although the North of the borough received very few appeals. The high number of appeals is likely to be caused by low level of capacity across the borough; the average spare capacity across the borough is 3%, while the recommended capacity set by the DfE is 5%. In Earley there is less than 1% capacity.

Births in Wokingham

The table below shows the number of live births by calendar year and by academic year. The ONS calendar year data includes 2014 births and shows a rising trend until 2012, with a significant decline from this trend in both 2013 and 2014. This is consistent with national live birth trends. The academic year data shows the same trend

The cohort born in the 2012/13 academic year will enter Reception classes in the 2017/18 academic year – pointing to a marked reduction in demand across Wokingham at that point and a further fall in demand in the 2018/19 academic year. New housebuilding and changing patterns of occupation may offset the declining birth rate, but these are likely to be highly localised impacts.

| Calendar year | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| <i>ONS calendar year data</i> | 1,725 | 1,874 | 1,941 | 1,896 | 1,997 | 1,880 | 1,963 | 1,795 | 1,811 |
| Academic year | 05/06 | 06/07 | 07/08 | 08/09 | 09/10 | 10/11 | 11/12 | 12/13 | 13/14 |
| <i>From ONS</i> | 1,728 | 1,813 | 1,913 | 1,908 | 1,933 | 1,939 | 1,936 | 1,872 | 1,767 |

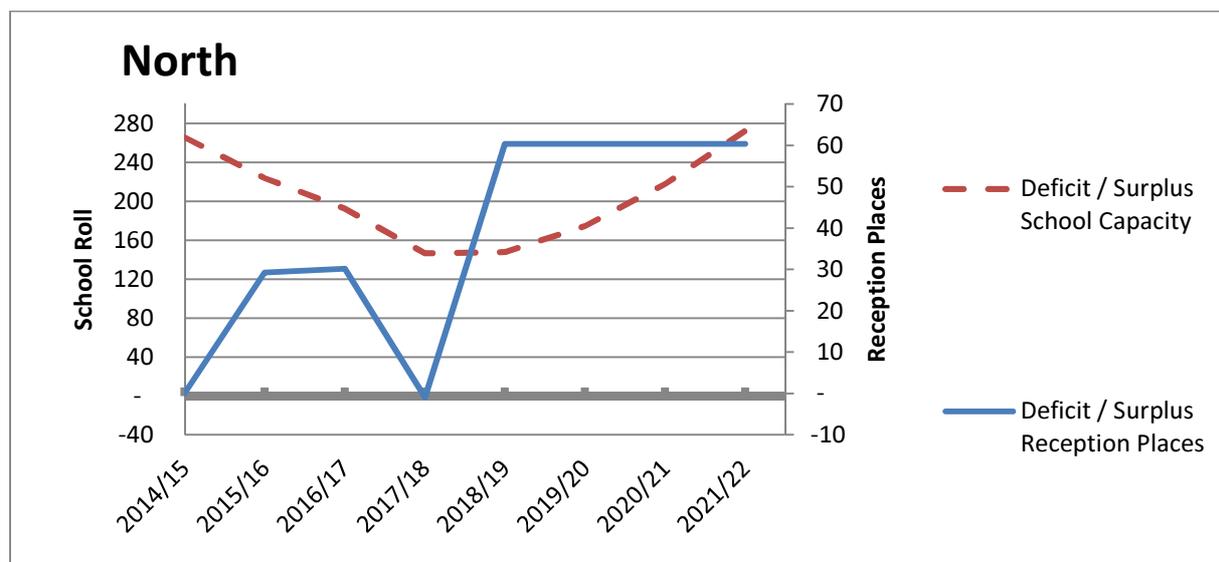
Areas where no action is proposed

North

This area comprises schools serving the Remenham, Wargrave and Ruscombe, Sonning, Charvil, Hurst and Twyford wards.

The North has 1,589 primary school places. After the school admissions process in July 2015 there were 67 surplus places left (or 4% of the total) in the North planning area. This is 1% lower than the recommended level set out by the Department for Education (See chart 3 below). The number of children projected to need primary Reception class places is expected to fall a little until 2018 when the projection suggest that demand will match capacity. There is no planned housing development in the North planning area, there is no evidence of any significant migration of new families into the planning area, and the North's capacity is within the acceptable limits recommended by the DfE. The North is not therefore a "priority area" but capacity will need to be reviewed in 2019 when the projection suggests that the baby boom years are over.

North schools: Reception and whole school surplus / deficit to 2021/22



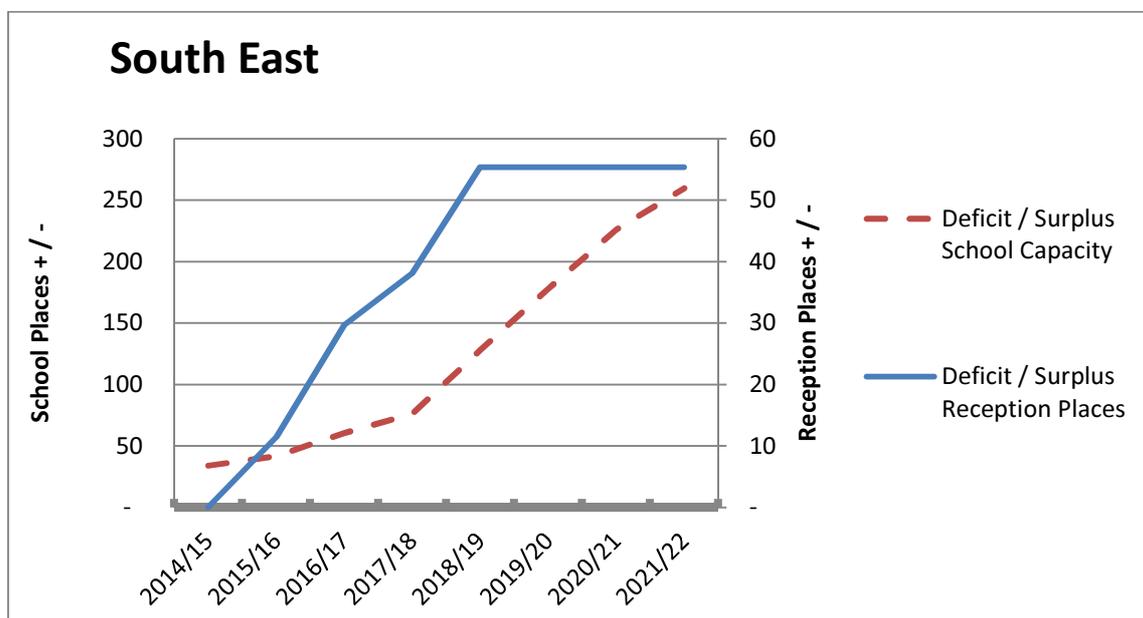
South-East

This area comprises schools serving the Wokingham Without, and Finchampstead North and South wards

The South-East has 1,632 primary school places. After the school admissions process in July 2015 there were 81 surplus places (or 5% of the total) available in the South-East planning area. This is equal to the recommended level set out by the Department for Education (See chart 3 below). The pupil projection for the South-East suggests a steady decline in numbers of pupils requiring Reception places leading to an increasing surplus. The level of planned house building is low (the most significant development is 130 new homes agreed for the United Charities Land on the edge of Crowthorne in the Wokingham Without area). Major developments on the periphery of the area (the Arborfield Strategic Development Location and the Road Transport Laboratory site in Bracknell) will bring bespoke primary school provision. The South-East is therefore not regarded as a priority

area for this strategy because measures are already in place to deal with potential rise in demand for places.

South-East schools: Reception and whole school surplus / deficit to 2021/22



Wokingham Town

This area comprises schools serving the Norreys, Wescott, Evendons, Winnersh and Emmbrook wards

East

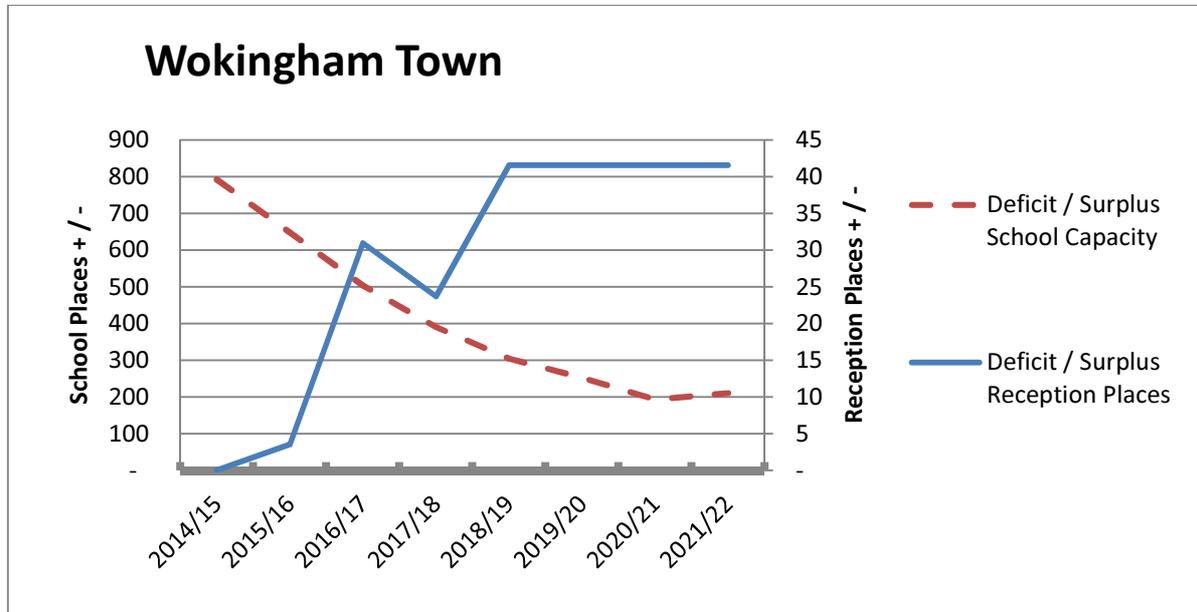
The Wokingham Town East has 1686 primary school places. After the school admissions process in July 2015 there were 76 places left over which represents 4.5% of the total number of places available in the Wokingham Town East planning area which is 0.5% below the recommended level set out by the Department for Education (See Chart 3 below). The pupil projection in the chart below shows that the numbers of children requiring Reception places will rise in 2016 to close to the current capacity. A new school in the planning area (Montague Park) will provide the necessary capacity to deal with the projected rise in numbers in 2016. The school has been built to provide 420 places, with a further 210 places in a part of the building completed to shell only. The projection Vs capacity chart shows that after 2019 extra capacity will become available beyond the 5% recommended by the DfE. The chart does not include the extra pupils generated by the South Wokingham SDL (Montague Park), who will significantly reduce this surplus.

West

The Wokingham Town West has 2,344 primary school places. After the school admissions process in July 2015 there were 72 places left over which represents 3% of the total number of places available in the Wokingham Town West planning area which is 2% below the recommended level set out by the Department for Education (See chart 3). The pupil projection shown in the chart below shows that the Reception numbers are expected to rise in 2016 but the numbers are expected to remain below the current capacity. Approximately 450 new homes are planned (the bulk of these as part of the Hatch Farm Dairies development). These will be delivered over an indeterminate period (which could extend to

the next decade). New primary schools with expansion potential will be built as part of the north and south Wokingham Strategic Development Locations on the periphery of the area as part of the Matthewsgreen development and south of the Wokingham to Bracknell rail line near to Molly Millars Lane. For these reasons Wokingham Town West is not regarded as a priority area for this period.

Wokingham Town schools: Reception and whole school surplus / deficit to 2021/22



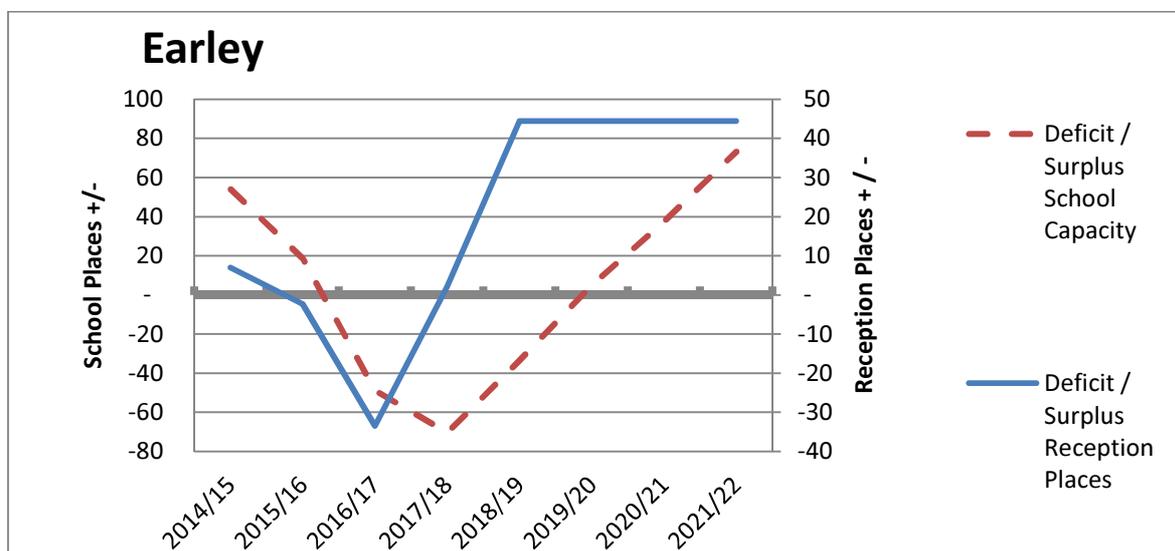
Areas where action is proposed

Earley

This area comprises schools serving the Maiden Erlegh, Hawkedon and Hillside wards.

Earley has more primary school places than any other planning area (3,114 places see chart 3). After the school admissions process in July 2015 there were only 6 available places left in Earley: 1 in year 1, 2 in year 5 and 3 in year 6. 30 children in Earley were diverted to schools in Woodley in 2015. In total Earley has 0.01% of unfilled places in its planning area which is 5% lower than the recommended level set out by the Department for Education (see chart 3 below). The pupil projection suggests that in 2016 there will be an increase in the number of children requiring places in Earley schools and will continue to increase until 2017. The chart below shows the number of predicted children that will require Reception places in Earley compared to the current capacity. A factor that may affect the pupil projection is the movement of families with young children into the planning area. A significant increase in the number of such families in 2015 is likely to have resulted in there being a shortage of places in Earley.

Earley schools: Reception and whole school surplus / deficit to 2021/22



Despite no discernible upwards trend in the number of births and no significant recent housing development taking place in Earley there has been a rise in the number of children requiring school places. The rise in demand for places is likely to have come about because of new families moving into Earley replacing older childless households. For 2015 admissions there were a significant number of children who could not be placed in schools in the Earley planning area, 7% (30 children). These children were diverted to schools outside of Earley into Woodley and Winnersh. The School Place Situation for September 2015 chart below shows that Earley Schools are full to capacity from Reception to year 6.

| SCHOOL PLACE SITUATION FOR SEPTEMBER 2015 AS AT 23/7/15 | | | | | | | | | |
|---|---------------------------------|-------------------------------------|------------|------------|------------|------------|------------|------------|------------|
| | Year Groups | Admission Number (Reception/Year 3) | R (2015) | Y1 | Y2 | Y3 | Y4 | Y5 | Y6 |
| PRIMARY, FREE SCHOOLS & AL | | | | | | | | | |
| | Earley | | | | | | | | |
| 2116 | Aldryngton Primary | 45 | 45 | 46 | 45 | 45 | 45 | 45 | 46 |
| 3312 | Earley St Peter's | 70 | 71 | 69 | 70 | 70 | 70 | 69 | 70 |
| 2237 | Hawkedon Primary | 90 | 90 | 90 | 90 | 90 | 90 | 90 | 87 |
| 2238 | Hillside Primary | 60 | 60 | 60 | 60 | 60 | 60 | 60 | 60 |
| 3371 | Loddon Primary | 60 | 60 | 60 | 60 | 60 | 61 | 60 | 60 |
| 2235 | Radstock Primary | 60 | 60 | 60 | 60 | 60 | 61 | 60 | 60 |
| 2105 | Whiteknights Primary | 60 | 60 | 60 | 60 | 60 | 61 | 59 | 59 |
| | | 445 | 446 | 445 | 445 | 445 | 448 | 443 | 442 |
| | Current places available | | 0 | 1 | 0 | 0 | 0 | 2 | 3 |

| |
|--------------------------------|
| Full |
| Two or fewer places available |
| Three or more places available |

Capacity required

Earley has 3,114 primary school places covering all year groups. All primary schools in Earley were filled in 2015 and 30 children in the Earley Planning area were unable to be placed in the area and were diverted to schools in neighbouring areas.

Most future school place needs are determined using the standard roll projection model and the analysis of need in Earley commences with this. However, there are some special considerations that apply in Earley and these are dealt with subsequently, to arrive at the final estimation of the number of additional places required.

There are 445 available Reception places and 447 pupils are projected to need places in 2016, numbers are projected to increase to 478 in 2017 before dropping again in 2018 to 443.

| Chart 5 Reception year Projected numbers for earley compared to current number of places and recommended numbers of extra places | | | | | | |
|--|-------------------|----------------|---|--------------------------------------|--|-------------------------|
| Year | Predicted Numbers | Current Places | The difference between Predicted numbers and current places | 5% of the current predicted numbers* | Estimate of the total number of extra places required for the reception year** | Forms of entry required |
| 2015 | 438 | 445 | 7 | 21.9 | 15 | 0.496667 |
| 2016 | 447 | 445 | -2 | 22.35 | 25 | 0.823072 |
| 2017 | 478 | 445 | -33 | 23.9 | 57 | 1.913045 |
| 2018 | 443 | 445 | 2 | 22.1 | 20 | 0.667469 |
| 2019 | 443 | 445 | 2 | 22.1 | 20 | 0.667469 |
| 2020 | 443 | 445 | 2 | 22.1 | 20 | 0.667469 |
| 2021 | 443 | 445 | 2 | 22.1 | 20 | 0.667469 |
| 2022 | 443 | 445 | 2 | 22.1 | 20 | 0.667469 |
| Key | | | | | | |
| * as recommended by Dfe | | | | | | |
| ** The difference between Predicted numbers and current number of places - the 5% added to the predicted score = the number of required places | | | | | | |
| *** Estimate of the total number of extra places required for the reception year** divided by 30 (one form of entry) | | | | | | |

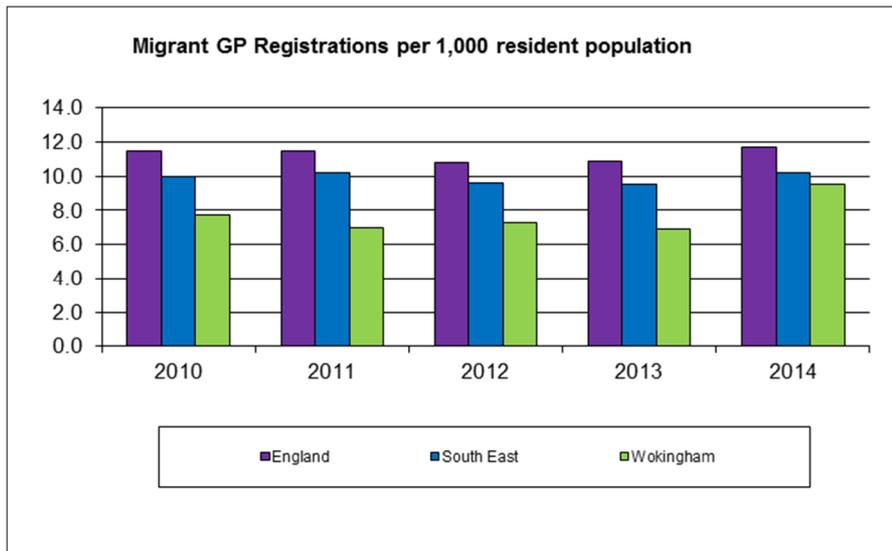
Chart 5 estimates the number of forms of entry that will be required over the next 7 years. The predicted number is based on birth rate statistics and the current number of places available in Earley schools is also known. The DfE's recommendation of a 5% excess is also known. Both migration into the borough and cross border movement are taken account of in these figures, albeit only at (recent) historic rates.

The impact of migration

The Woodley and Earley areas, in particular the latter, have experienced significant changes in their demography due to immigration and changes in house ownership. An analysis of government data from 2014 appears to support this:

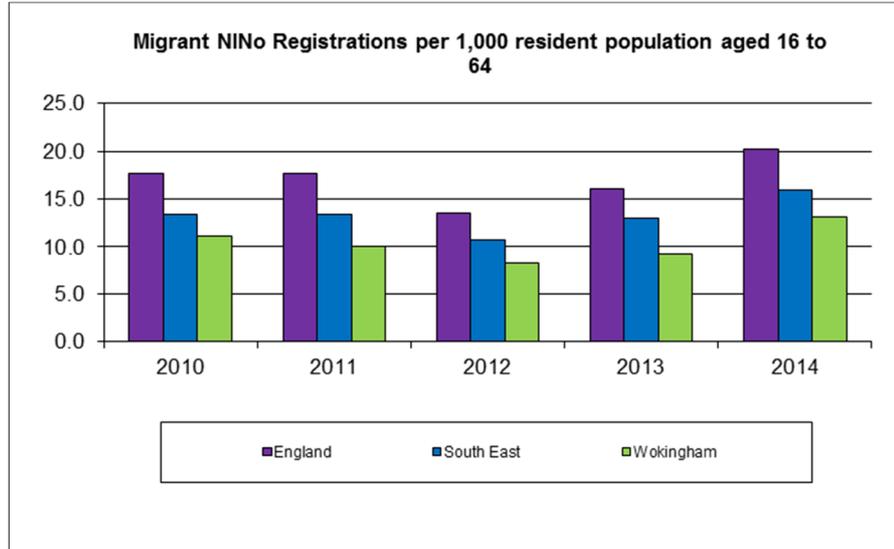
- In Wokingham, GP registrations by migrants for the period 2010-2014 have increased at 5 times the rate for the South East region and England (see Fig. 1);

Fig. 1



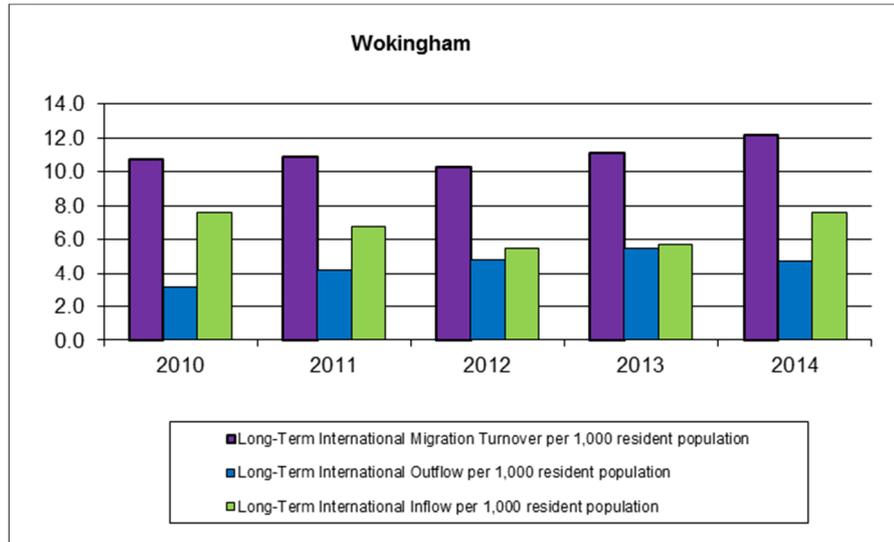
- National Insurance Number registrations for people aged 16-64 years increased by 31% between 2013 & 2014 (compared to 22% and 25% for the South East and England respectively (see Fig 2);

Fig.2



- Wokingham has been a net recipient for international migrants for several years, (see Fig 3) and has seen a 33% increase between 2013 & 2014;

Fig. 3



Housing and age profile

ONS data on population movements in and out of local authorities shows that Wokingham is losing people aged 50+ and gaining a greater number of people aged 20-44 years (see Fig 4). This is in contrast to the South East region (see Fig 5) where there is barely any loss of the 50+ population (i.e. what you would expect from the large numbers of new houses). This pattern was repeated in 2013 and 2012. In 2014, Wokingham lost 460 people aged 50-69 years and gained 670 people aged 25-44 years old.

Fig.4

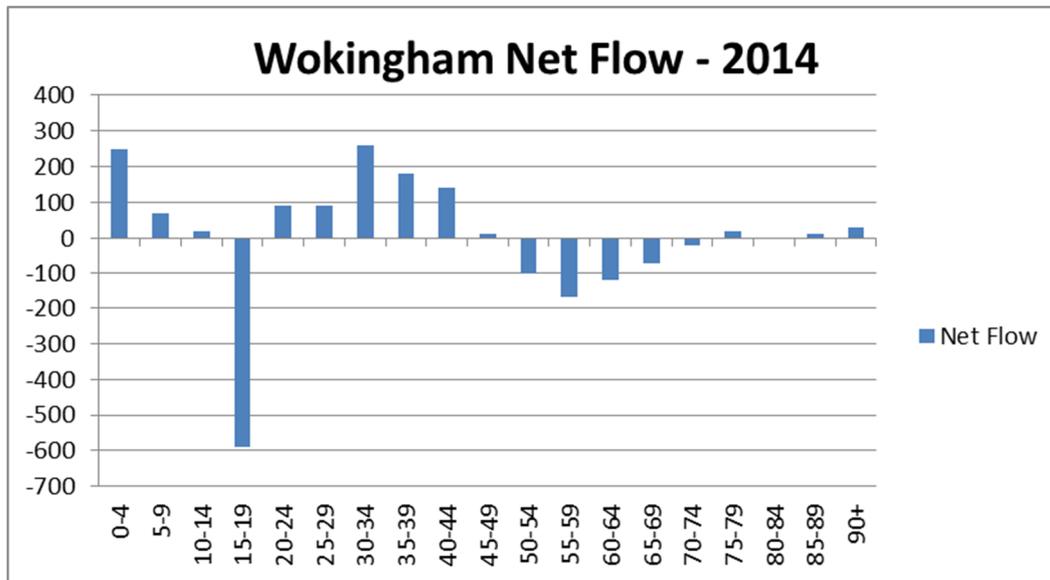
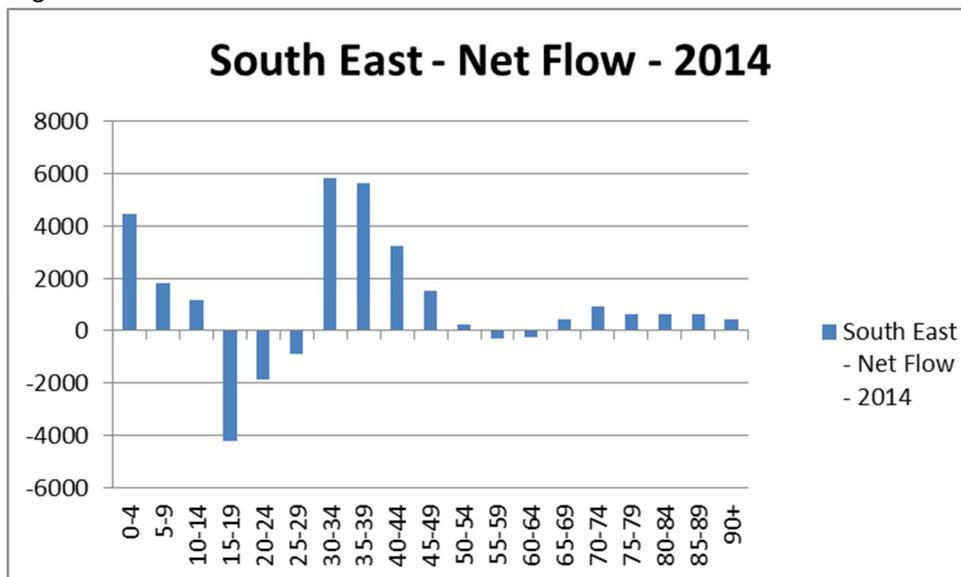


Fig. 5



It isn't possible to break down these figures into planning areas and calculate Earley's share nor can the age profile of the children be determined but if it was assumed that the majority of the older people leaving the borough were from Earley and were being replaced by a similar number of younger couples then an indication of the likely yield could be obtained.

For 2014, 460 people aged 50-69 years left Wokingham, so assuming they were replaced by 230 couples, each with 2 children, aged 0-16, then they could yield 28 children per year group. This figure is considered conservative and the anecdotal evidence from local schools is that new families are much larger.

The following table shows the impact of this influx on the projections for the Earley Area:

| Earley Planning Area | Current | | | Including housing yield | | Including housing yield & new families | |
|----------------------|---------|--------|--------|-------------------------|--------|--|--------|
| | AN | AN +/- | %AN+/- | AN +/- | %AN+/- | AN +/- | %AN+/- |
| 2015/16 | 445 | -2 | -1% | -8 | -2% | -36 | -7% |
| 2016/17 | 445 | -33 | -8% | -35 | -8% | -63 | -12% |
| 2017/18 | 445 | 2 | 0% | 2 | 0% | -26 | -6% |
| 2018/19 | 445 | 36 | 8% | 35 | 8% | 7 | 2% |
| 2019/20 | 445 | 36 | 8% | 35 | 8% | 7 | 2% |
| 2020/21 | 445 | 36 | 8% | 36 | 8% | 8 | 2% |
| 2021/22 | 445 | 36 | 8% | 36 | 8% | 8 | 2% |

Earley has therefore been identified as a “priority area” that will need new provision.

The predicted peak period for reception year provision is 2017 where near to two forms of entry will be required whilst in 2016 1 form of entry will be required. House building will have a limited impact (the most significant new site, Sibly Hall, will only generate 89 new homes). After 2017 the standard projection indicates a fall in demand from the peak of 2017. Taking the projection and the migration impact into account there is a requirement for 1.5 forms of entry above what is available today to meet near future needs.

| Earley Planning Area | Planning | With additional 1.5FE | | |
|----------------------|----------|-----------------------|--------|--------|
| | | AN | AN +/- | %AN+/- |
| 2016 | 2015/16 | 490 | 9 | 2% |
| 2017 | 2016/17 | 490 | -18 | -4% |
| 2018 | 2017/18 | 490 | 19 | 4% |
| 2019 | 2018/19 | 490 | 52 | 11% |
| 2020 | 2019/20 | 490 | 52 | 11% |
| 2021 | 2020/21 | 490 | 53 | 11% |
| 2022 | 2021/22 | 490 | 53 | 11% |

Woodley

This area comprises schools serving the Bulmershe and Whitegates, Southlake, Loddon, and Coronation wards.

Woodley has 2,451 primary school places. After the school admissions process in July 2015 there were 67 surplus places (or 3% of the total) in the Woodley planning area (2% below the DfE recommended level) (See Chart 3 below). Woodley’s pupil projection chart below shows that the expected number of pupils for 2016 exceeds the capacity in the area. In addition to this planning permission has been granted for 1,000 homes to be built in the planning area and building work has already begun.

Woodley’s primary schools are near to capacity with very few available places, the school place situation chart shows that 7 of the 8 primary schools in the planning area are near to or at capacity from the reception year to year 6 with only St Dominic Savio Catholic primary school showing any capacity from the reception year to year 1.

SCHOOL PLACE SITUATION FOR SEPTEMBER 2015 AS AT 23/7/15

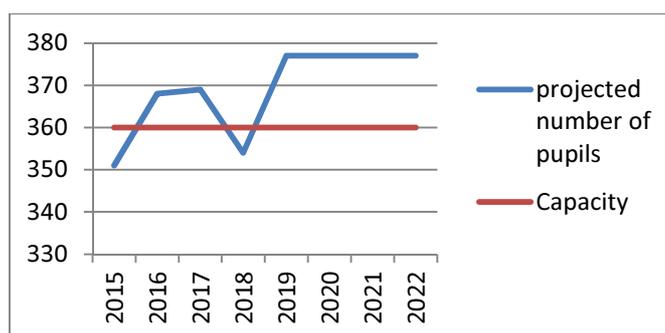
| | Year Groups | Admission Number (Reception/Year 3) | R (2015) | Y1 | Y2 | Y3 | Y4 | Y5 | Y6 |
|---------------------------------------|---------------------------------|--|------------|------------|------------|------------|------------|------------|------------|
| PRIMARY, FREE SCHOOLS & AL | | | | | | | | | |
| | Woodley | | | | | | | | |
| 2245 | Beechwood Primary | 45 | 45 | 45 | 43 | 45 | 44 | 40 | 41 |
| 2246 | Highwood Primary * | 30 | 30 | 32 | 30 | 31 | 28 | 30 | 30 |
| 2167 | Rivermead Primary | 60 | 60 | 61 | 48 | 60 | 57 | 60 | 56 |
| 2247 | South Lake Primary | 60 | 60 | 60 | 60 | 60 | 59 | 60 | 60 |
| 3368 | St Dominic Savio | 60 | 49 | 59 | 57 | 60 | 60 | 46 | 57 |
| 2160 | Willow Bank Infant | 60 | 60 | 60 | 60 | 0 | 0 | 0 | 0 |
| 2161 | Willow Bank Junior | 60 | 0 | 0 | 0 | 60 | 60 | 60 | 60 |
| 3056 | Woodley Primary | 45 | 45 | 46 | 45 | 47 | 45 | 43 | 45 |
| | | 360/360 | 349 | 363 | 343 | 363 | 353 | 331 | 349 |
| | Current places available | | 11 | 1 | 17 | 0 | 6 | 21 | 11 |

| |
|--------------------------------|
| Full |
| Two or fewer places available |
| Three or more places available |

The Woodley birth rate shows no clear trend. Planning consent has been granted for nearly 1,000 homes in the area. The number of pupils generated per year by these new homes will be dependent on how quickly the homes are built. In the long term the new homes are likely to generate over 30 pupils per year over the next 8 years and in the short term could generate significantly more than this. In 2014 11 children were diverted to Woodley from the oversubscribed Earley planning area but for 2016 as recommended above provision may be added to Earley which should negate diversions Woodley. The Woodley reception year projection Vs capacity chart shows significant rise in the number of pupils requiring reception class places from 2016 to 2017 and then after a 1 year dip the numbers are expected to rise again.

It is for these reasons that the Woodley Planning area is identified as a hotspot requiring additional provision. Taking account of the projection and the new housing it is proposed that at least 45 places per year (315 places) will be required.

Woodley schools: Reception and whole school surplus / deficit to 2021/22



Housing impact

The table below shows the projected impact of the new homes planned in the Woodley area until 2022. House building will continue after this period, so demand will continue to rise.

| Woodley Planning Area | | Current | | Inc housing yield | |
|-----------------------|---------|---------|--------|-------------------|--------|
| | | | | AN +/- | %AN+/- |
| 2016 | 2015/16 | -8 | -2.33% | -17 | -5% |
| 2017 | 2016/17 | -9 | -2.60% | -21 | -6% |
| 2018 | 2017/18 | 6 | 1.58% | -4 | -1% |
| 2019 | 2018/19 | -17 | -4.75% | -23 | -6% |
| 2020 | 2019/20 | -17 | -4.75% | -20 | -5% |
| 2021 | 2020/21 | -17 | -4.75% | -18 | -5% |
| 2022 | 2021/22 | -17 | -4.75% | -18 | -5% |

Taking account of the impact of the additional homes it is recommended that 1.5 FE (45 places per year / 315 places overall) be created in the Woodley area. Taking account of this expansion, projected rolls and the proposed new capacity the place sufficiency position looks like this:

| Woodley Planning Area | | With additional 1.5FE | | |
|-----------------------|---------|-----------------------|--------|--------|
| | | AN | AN +/- | %AN+/- |
| 2016 | 2015/16 | 405 | 28 | 7% |
| 2017 | 2016/17 | 405 | 24 | 6% |
| 2018 | 2017/18 | 405 | 41 | 10% |
| 2019 | 2018/19 | 405 | 22 | 5% |
| 2020 | 2019/20 | 405 | 25 | 6% |
| 2021 | 2020/21 | 405 | 27 | 7% |
| 2022 | 2021/22 | 405 | 27 | 7% |

South-West

This area comprises schools serving the Barkham, Shinfield North and South, Arborfield and Swallowfield wards

The South-West has 1,686 primary school places. After the school admissions process in July 2015 there were 124 surplus places left over which represents (or 7% of the total) number of places available in the South West planning area which is (2% above the DfE recommended level) set out by the Department for Education (See chart 3 below). The Chart below showing Reception year projection Vs capacity does not provide a trend, instead it shows a turbulent line indicating increases and decreases in predicted numbers of places required over the next 4 years. It also shows that the capacity for the planning area outweighing exceeding the number of pupils expected to require school places. The projection however does not fully take into account new residential development delivered through a number of schemes, the most significant of which form part of the two Strategic Development Locations (SDLs) within the planning area.

The two SDL schemes (details below) include appropriate education provision to be triggered by house building. However, there are other schemes in the area that fall outside these major planning consents, including recently completed and in progress schemes that are expected to lead to an increase in demand before the SDL triggers are met.

The Arborfield SDL will provide 3,500 new homes and South of the M4 SDL that will provide 2,700 new homes. These new homes will take up the extra capacity and will likely cause a capacity shortage in the future. To alleviate the capacity and meet needs generated by these developments S106 funding has been secured to build a new primary schools at Spencers Wood (as part of the Spencers Wood / Three Mile Cross scheme) (210 places with expansion options), in Shinfield village (as part of the Shinfield West scheme) (420 places with an expansion option) and two schools (420 place with expansion options) in Arborfield. The Spencers Wood scheme and Shinfield village schemes are both in active development (some housing has been completed on the Spencers Wood site) but (in the case of the Shinfield West scheme) the trigger for the school build will not be met until 200 homes have been built with the expected date for completion being September 2017.

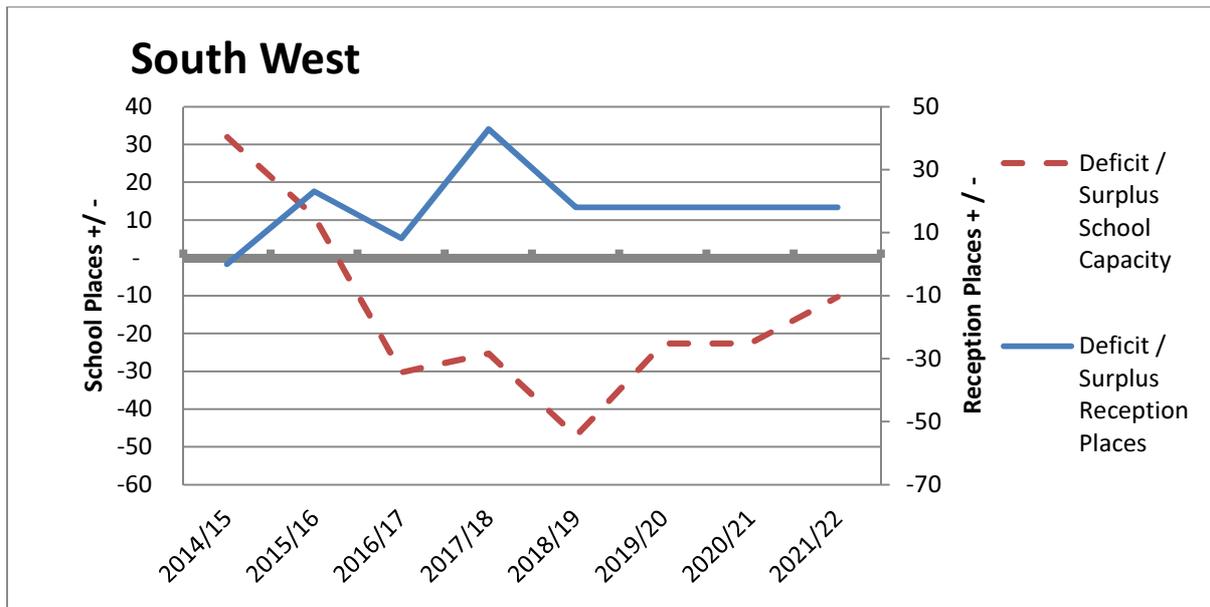
The capacity in the South-West Planning area is already near to full. The chart below (School Place Situation for July 2015) shows that the reception year and year 1 are near to full with only 3 and 1 places available for use respectively.

| SCHOOL PLACE SITUATION FOR SEPTEMBER 2015 AS AT 23/7/15 | | | | | | | | | |
|--|---------------------------------|--|-----------------|------------|------------|------------|------------|------------|------------|
| | Year Groups | Admission Number (Reception/Year 3) | R (2015) | Y1 | Y2 | Y3 | Y4 | Y5 | Y6 |
| PRIMARY, FREE SCHOOLS & AL | | | | | | | | | |
| | South West | | | | | | | | |
| 3373 | Coombes Primary *** | 75/90 | 75 | 75 | 68 | 75 | 75 | 82 | 80 |
| 2088 | Farley Hill Primary | 30 | 27 | 29 | 27 | 28 | 28 | 22 | 26 |
| 3319 | Grazeley Primary ** | 30/15 | 30 | 30 | 19 | 15 | 17 | 12 | 13 |
| 2089 | Lamb's Lane * | 30 (2 x bulge 60 places) | 30 | 30 | 30 | 50 | 28 | 42 | 29 |
| 2157 | Shinfield Infant | 90 | 90 | 90 | 90 | 86 | 0 | 0 | 0 |
| 3041 | Shinfield St Mary's ** | 90/63 | | 0 | 0 | 90 | 61 | 45 | 42 |
| | | 255/240 | 252 | 254 | 234 | 344 | 209 | 203 | 190 |
| | Current places available | | 3 | 1 | 10 | 12 | 6 | 55 | 37 |

| | |
|--|--------------------------------|
| | Full |
| | Two or fewer places available |
| | Three or more places available |

New homes have already been constructed in both SDLs which means that there will like be a need for extra temporary provision for 2016. It is for this reason that the South-West is regarded as a priority area for this strategy (with an identified need to create 30 places per year capacity in advance of the opening of either of the new schools in that area.

South-west schools: Reception and whole school surplus / deficit to 2021/22



New provision in progress

The south-west planning area and Wokingham Town east and west planning areas have long term needs that will be met through seven future-proofed primary schools six of which are incorporated (to provide sites (6) and funding (5)) in S106 agreements. The first of these schools at Montague Park in Wokingham Town is planned to open in September 2016. It is likely that new schools will open in Shinfield (Shinfield West) from September 2017, in Arborfield in 2018 and Spencers Wood from 2018. Programmes for other schools are less certain but will follow on during the following decade. These include the North Wokingham school at Matthewsgreen (2018 on) and the second schools in Arborfield and in south Wokingham.

Options analysis

Having established the level of need by area the strategy now looks at how these needs can be met, taking into account the need to

- promote sustainable schools and communities and
- to raise school standards.

To create viable schools it is proposed, where possible and with the support of schools themselves, to give priority to schemes that create schools based on whole forms of entry (where possible at least 420 places). This is because smaller schools (and particularly smaller schools not based on year groups that are multiples of 30) carry high fixed costs that cannot now be fully compensated for in the funding formula and may have a number of classes of less than 30 (but which carry the costs of a class of 30). Austerity budgets (where overall allocations are “flat cash per pupil” but where costs continue to rise) exacerbate these pressures.

Financial implications

Revenue and capital planning will be integrated in the implementation of the strategy.

Start up revenue costs for new schools and initial funding for school expansions will be met from the Dedicated Schools Grant. New schools will be Academies (badged as “Free Schools” and long term funding will come directly from the DfE through a formulaic arrangement.

Capital costs will be met through a combination of direct delivery of new schools by housing developers, ring-fenced S106 funding and WBC held capital grants.

School Standards and the wider agenda

Based on the research and feedback from officers, members, schools and parents it was agreed that when carrying out any detailed options appraisal a wider range of factors would be considered than have perhaps been used previously. For example, in addition to the more obvious factors such as access, space and condition we would need to consider such factors as:

- a. Co-location and opportunities to free up space for school use.
- b. Increased need for under-4s child care (including the impact of the extension of free childcare to some three year olds and the duty to provide free places for deprived two year olds) and a review of children’s centres.
- c. Impacts on school standards and sustainability
- d. Impacts on the local community.

The following list is not exhaustive and will not apply to all school projects. It does however illustrate the range of opportunities that is created by new and expanded school provision.

School development (whether through expansion or new schools) can bring the opportunity to create additional childcare places. These could be traditional nursery classes, dedicated space for a wider age range or space on site to allow other parties (private, voluntary or independent early years providers) to create affordable child-care places.

Co-location of activities (such as community use sports or other facilities) can both benefit the wider community and bring better facilities than might otherwise have been available to a school. In some cases facilities to support outreach work by Childrens Centres and other Early Help services may be desirable. Childrens Centres work on a “hub and spoke” model with designated children’s centres in Wokingham, Winnersh, Woodley, Twyford, Finchampstead and Shinfield supported by timetabled activities in other community use buildings away from the main sites.

New and expanded schools can bring opportunities to raise school standards.

New schools can allow new providers to bring innovative and challenging models of educational delivery into the borough. Where they are able to establish a local chain of schools they may be more sustainable because costs of leadership, management and specialist support can be spread across a number of schools.

Expanded schools bring economies of scale, making those schools more sustainable. Where schools currently operate mixed age groups they will be able to move to single year teaching. Generally any existing deficiencies in accommodation will be rectified as part of the expansion works. Enlarged schools are better able to sustain the levels of leadership

required (numbers and grades of leaders and managers) and to fund specialist teaching support.

More local provision will help reduce traffic congestion and schemes will include measures to mitigate traffic impacts – whether through on or offsite pupil drop-off areas or through the creation and implementation of robust traffic management plans.

Annex 1

| Schools by Neighbourhood | | |
|---------------------------------|-------------------------------|---------------------|
| School | Ward | NH/ Planning Areas |
| The Loddon Primary | Maiden Erlegh | Earley |
| Earley St Peter's C of E VA Pr | Maiden Erlegh | Earley |
| Aldryngton Primary | Maiden Erlegh | Earley |
| Whiteknights Primary | Hillside | Earley |
| Radstock Primary | Hillside | Earley |
| Hillside Primary | Hillside | Earley |
| Hawkedon Primary | Hawkedon | Earley |
| | | |
| Robert Piggott C of E Infant | Remenham Wargrave and Ruscomb | North |
| The Colleton Primary | Twyford | North |
| Crazies Hill C of E Primary | Remenham Wargrave and Ruscomb | North |
| Polehampton Junior | Twyford | North |
| Robert Piggott C of E Junior | Remenham Wargrave and Ruscomb | North |
| Polehampton C of E Infant | Twyford | North |
| Sonning C of E Primary | Sonning | North |
| St Nicholas C of E Primary | Hurst | North |
| | | |
| Oaklands Junior | Wokingham Without | South East |
| Oaklands Infant | Wokingham Without | South East |
| Gorse Ride Infant | Finchampstead South | South East |
| Gorse Ride Junior | Finchampstead South | South East |
| Finchampstead C of E Aided P | Finchampstead South | South East |
| Nine Mile Ride Primary | Finchampstead South | South East |
| Hatch Ride Primary | Wokingham Without | South East |
| Saint Sebastians C of E Prima | Wokingham Without | South East |
| | | |
| Farley Hill Primary School | Swallowfield | South West |
| Shinfield St Mary's C of E Aide | Shinfield South | South West |
| The Coombes Primary | Arborfield | South West |
| Grazeley Parochial C of E Aide | Shinfield South | South West |
| Shinfield Infant | Shinfield South | South West |
| Lambs Lane Primary | Swallowfield | South West |
| | | |
| Wescott Infant | Wescott | Wokingham Town East |
| All Saints Primary | Norreys | Wokingham Town East |
| Westende Junior | Wescott | Wokingham Town East |
| Keepatch Primary | Norreys | Wokingham Town East |
| St Teresas Catholic Primary | Wescott | Wokingham Town East |
| | | |
| Bearwood Primary | Winnersh | Wokingham Town West |
| Winnersh Primary | Winnersh | Wokingham Town West |
| The Hawthorns Primary | Evendons | Wokingham Town West |
| Walter Infant | Emmbrook | Wokingham Town West |
| St Pauls C of E Junior | Emmbrook | Wokingham Town West |
| Emmbrook Infant | Emmbrook | Wokingham Town West |
| Emmbrook Junior | Emmbrook | Wokingham Town West |
| | | |
| Beechwood Primary | Bulmershe and Whitegates | Woodley |
| South Lake Primary | South Lake | Woodley |
| St Dominic Savio Catholic Prim | Coronation | Woodley |
| Highwood Primary | South Lake | Woodley |
| Rivermead Primary | Bulmershe and Whitegates | Woodley |
| Woodley C of E Primary | Loddon | Woodley |
| Willow Bank Infant | Coronation | Woodley |
| Willow Bank Junior | Coronation | Woodley |
| Ambleside | Bulmershe and Whitegates | Woodley |

References

WBC (2014) **Children and Young People Plan 2014-2016** Wokingham
<http://www.wokingham.gov.uk/council-and-meetings/open-data/policies-and-strategies/?assetdet7653806=348830&categoryesctl7821517=7732>

WBC (2015) **Supplementary Planning Guidance** <http://www.wokingham.gov.uk/planning-and-building-control/planning-policy/supplementary-planning-guidance-and-documents/>

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WBC (2015) **Regeneration** <http://www.wokingham.gov.uk/planning-and-building-control/regeneration/wokingham-town-centre-regeneration/>

| | |
|-----------------------------|--|
| TITLE | Primary Strategy Implementation Plan Phase 1 |
| FOR CONSIDERATION BY | The Executive on 28 January 2016 |
| WARD | None specific |
| DIRECTOR | Judith Ramsden , Director of Children’s Services |
| LEAD MEMBER | Charlotte Haitham Taylor, Executive Member for Children’s Services |

OUTCOME / BENEFITS TO THE COMMUNITY

To ensure that there are sufficient school places to discharge the Councils duties under the Education Act 1996.

RECOMMENDATION

That Executive:

- 1) approves the selection of the school sites as listed below to meet Primary school sufficiency for 2016/217;
- 2) authorises the commissioning of work to carry out the detailed feasibility and, subject to approval of final capital bids and business cases, to deliver the necessary works.

SUMMARY OF REPORT

1. This report makes recommendations for the expansion of selected schools in the following planning areas:

- i. Woodley
 - Highwood
 - Beechwood
- ii. Earley
 - Loddon
 - Aldryngton
- iii. South West
 - Ryeish Green

It indicates how many places will be required, how they might be delivered and what the indicative costs could be.

It then seeks approval for the commissioning of detailed feasibility work leading to a phased delivery of places from September 2016 onwards.

The report also highlights the fact that in developing the most effective solution for the chosen sites that there is a need to consider the possible relocation of other services which are currently occupying former school buildings.

BACKGROUND INFORMATION

In July 2015, a report was submitted to the Children's Services Overview and Scrutiny Committee which set out the key components of the primary provision strategy for the period 2015-2018 and how the strategy should be developed and implemented. The report explained how the analysis of the data indicated that there were three areas of concern (or "hot spots"):

- Earley
- Woodley
- South West

A second report was submitted to the committee in October which provided a further update on the progress made, including the latest data analyses, feedback from consultation and the emerging issues.

1. METHODOLOGY

- 1.1. A detailed analysis of all borough school planning areas was carried out using a combination of data and intelligence from national, borough and local sources. This enabled the identification of priority areas with need for new places. Completed
- 1.2. For each hotspot, a shortlist of schools was compiled using a high level analysis of school sites. Completed
- 1.3. A detailed assessment was then carried out on each shortlisted school in order to identify the target sites for expansion. Completed
- 1.4. Consultation on the above work with local schools, clusters, head teachers, parents and local members and the work has been overseen by a Working Group of councillors representing the three 'hotspot' areas, chaired by the Deputy Executive Member for Children's Services. Completed
- 1.5. A detailed feasibility study to be carried out on the selected schools including the delivery solution, phasing of the works and implementation plan.
- 1.6. Implementation as required from 2016 onwards.

2. DETAILED ANALYSIS

2.1. Borough Analysis - Places & Demographics

2.1.1. Birth

- a. In line with national trends the number of live births in Wokingham showed a rising trend until 2012, with a significant decline from this trend in both 2013 and 2014.

| Calendar year | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| ONS calendar year data | 1,725 | 1,874 | 1,941 | 1,896 | 1,997 | 1,880 | 1,963 | 1,795 | 1,811 |
| Academic year | 05/06 | 06/07 | 07/08 | 08/09 | 09/10 | 10/11 | 11/12 | 12/13 | 13/14 |
| Calculated from ONS Data | | 1,824 | 1,919 | 1,911 | 1,963 | 1,919 | 1,935 | 1,851 | 1,806 |
| From ONS / NHS (2014) | 1,728 | 1,813 | 1,913 | 1,908 | 1,933 | 1,939 | 1,936 | 1,872 | 1,769 |

- b. The cohort born in the 2012/13 academic year will enter Reception classes in the 2017/18 academic year – pointing to a marked reduction in demand across Wokingham at that point and a further fall in demand in the 2018/19 academic year.
- c. However, new housebuilding and changing patterns of occupation are offsetting this reduction in need for places. (see Area Analysis below)

2.1.2. Housing

- a. The bulk of new housing is being generated by the Strategic Development Locations SDLs and the demand for school places in these areas will be met by 6 new primary schools which will be built over the next 5 years using S106 or CIL funding.
- b. In addition to those being generated by the SDLs, there are other smaller developments including 1000 new homes being built in Woodley, along with other smaller developments. However, none of these justify a new school in their own right.
- c. Evidence gathered from the local community and admissions data shows that a major shift in house occupancy is occurring, in particular in Earley.

2.1.3. Migration

- a. Wokingham has been a net recipient for international migrants for several years and has seen a 33% increase between 2013 & 2014;
- b. In Wokingham, general practitioner GP and national insurance registrations are increasing more rapidly than the rest of South East Region or England
- c. Wokingham is a net recipient for migration from Reading which itself is experiencing even higher levels of immigration than Wokingham;
- d. ONS data on population movements in and out of local authorities shows that Wokingham is losing people aged 50+ and gaining a greater number of people aged 20-44 years (see Figs 1 & 2 below).
- e. This is in contrast to the South East region where there is barely any loss of the 50+ population.
- f. This pattern reflects what is believed to be happening in Earley i.e. houses are being sold by older age groups and being bought by young families.

2.1.4. Admissions

- a. The level of available places across the borough currently stands at 3% as compared to the DfE recommended threshold of 5%
- b. In Earley, the level is below 1% and in Woodley 3%.

2.2. Area Analysis

2.2.1. The area analysis has concluded that there are three areas which should be classed as priority areas by which we mean that new places are needed (based on the DfE guidance of 5% surplus to allow for natural fluctuations) from September 2016 onwards:

- i. Earley
- ii. Woodley
- iii. South West

2.2.2. Earley

- a. Vacancies are 5% below the DfE guideline – in 2015, 7% or 30 children were diverted out of the area. The schools are popular with large waiting lists
- b. The community has reported a major influx of new families who are replacing older age groups. This is supported by ONS data – see 3.1.3 above.
- c. Net inflow from Reading due to:
 - i. Popularity of Earley schools
 - ii. High levels of immigration in Reading
 - iii. Insufficient primary provision in Reading
- d. It has been estimated that this influx of younger families could yield at least the equivalent of 1 FE.
- e. Increases in the number of new council tax accounts
- f. Increases in planning applications for house extensions to increase living accommodation;
- g. Waiting lists indicate that additional capacity is required in at least 3 year groups, Reception to Year 2;
- h. Requirement: 1.5 Form of Entry for at least 3 years with at least 1FE permanent

| Earley Planning Area | | Current Reception class shortfall | | | Including housing yield | | Including housing yield & new families | | With additional 1.5FE | | |
|----------------------|---------|-----------------------------------|--------|--------|-------------------------|--------|--|--------|-----------------------|--------|---------|
| | | AN | AN +/- | %AN+/- | AN +/- | %AN+/- | AN +/- | %AN+/- | AN | AN +/- | %AN +/- |
| 2016 | 2015/16 | 445 | -2 | -1% | -8 | -2% | -36 | -7% | 490 | 9 | 2% |
| 2017 | 2016/17 | 445 | -33 | -8% | -35 | -8% | -63 | -12% | 490 | -18 | -4% |
| 2018 | 2017/18 | 445 | 2 | 0% | 2 | 0% | -26 | -6% | 490 | 19 | 4% |
| 2019 | 2018/19 | 445 | 36 | 8% | 35 | 8% | 7 | 2% | 490 | 52 | 11% |
| 2020 | 2019/20 | 445 | 36 | 8% | 35 | 8% | 7 | 2% | 490 | 52 | 11% |
| 2021 | 2020/21 | 445 | 36 | 8% | 36 | 8% | 8 | 2% | 490 | 53 | 11% |
| 2022 | 2021/22 | 445 | 36 | 8% | 36 | 8% | 8 | 2% | 490 | 53 | 11% |

2.2.3. Woodley

- a. Vacancies are currently at 3% (2% below DfE guideline).
- b. All schools except one are full in Reception and Year 1
- c. Excluding the impact of new housing, projections indicate that an additional 0.5 FE is required simply to meet current demand.
- d. When taking into account new housing and the need to maintain a margin of spare places to allow for natural 'churn', a further minimum of 1FE is required.
- e. However, the local view is that the latest housing projections underestimate the number of and yield from the new housing e.g. schools

observe that new families seem to be larger than previously experienced. This could require a further 1FE in the medium term and so house build rates and yields will need to be monitored closely.

- f. New housing (1000 units) is under construction at two main housing developments at the western and eastern edges of the planning area.

Requirement: 1.5 FE permanent expansion with some available from Sep'16 plus the option for a further 1FE dependent on housing growth

- g. The following table shows the impact of the additional 1.5 FE form of entry on the admission number AN projections compared to the current situation and taking into account new housing:

| Woodley Planning Area | | Current Admission Number | | | Inc. housing yield | | With additional 1.5FE | | |
|-----------------------|---------|--------------------------|--------|--------|--------------------|--------|-----------------------|--------|--------|
| | | AN | AN +/- | %AN+/- | AN +/- | %AN+/- | AN | AN +/- | %AN+/- |
| 2016 | 2015/16 | 360 | -8 | -2% | -17 | -5% | 405 | 28 | 7% |
| 2017 | 2016/17 | 360 | -9 | -3% | -21 | -6% | 405 | 24 | 6% |
| 2018 | 2017/18 | 360 | 6 | 2% | -4 | -1% | 405 | 41 | 10% |
| 2019 | 2018/19 | 360 | -17 | -5% | -23 | -6% | 405 | 22 | 5% |
| 2020 | 2019/20 | 360 | -17 | -5% | -20 | -5% | 405 | 25 | 6% |
| 2021 | 2020/21 | 360 | -17 | -5% | -18 | -5% | 405 | 27 | 7% |
| 2022 | 2021/22 | 360 | -17 | -5% | -18 | -5% | 405 | 27 | 7% |

2.2.4. South West

- a. Whilst two new primary schools are planned for the south west these will not be available until 2018 at the earliest; but there is a need for reception places from 2016.
- b. Requirement: Need 1 FE reception class for up to two years, 2016 & possibly 2017.
- c. The following table shows the impact of the additional 1FE form of entry on the admission number AN projections compared to the current situation and taking into account new housing:

| Jan | | Current Admission Number | | | Inc. housing yield | | With additional 1FE | | |
|------|---------|--------------------------|--------|--------|--------------------|--------|---------------------|--------|--------|
| | | AN | AN +/- | %AN+/- | AN +/- | %AN+/- | AN | AN +/- | %AN+/- |
| 2016 | 2015/16 | 255 | 23 | 9% | 19 | 7% | 285 | 49 | 17% |
| 2017 | 2016/17 | 255 | 8 | 3% | -17 | -7% | 285 | 13 | 5% |
| 2018 | 2017/18 | 255 | 43 | 17% | 6 | 2% | 285 | 36 | 13% |
| 2019 | 2018/19 | 255 | 29 | 11% | -4 | -2% | 285 | 26 | 9% |
| 2020 | 2019/20 | 255 | 29 | 11% | 7 | 3% | 285 | 37 | 13% |
| 2021 | 2020/21 | 255 | 29 | 11% | 10 | 4% | 285 | 40 | 14% |
| 2022 | 2021/22 | 255 | 29 | 11% | 11 | 4% | 285 | 41 | 14% |

The remaining four planning areas either do not need new provision or are due to receive new schools as part of the development of the SDLs.

2.2.5. North

- a. No planned housing developments
- b. Vacancies in line with DfE guideline
- c. No reported changes to housing or migration patterns
- d. Will need to be reviewed in 2019 to understand the impact of the birth rate drop

2.2.6. South East

- a. Vacancies in line with DfE guideline
- b. Steady decline in demand for reception class places but these are offset by the new housing from the Arborfield SDL
- c. Two new primary schools for 2018 and 2020

2.2.7. Wokingham Town East

- a. Vacancies in line with DfE guideline
- b. New capacity is needed for Wokingham North and South SDL but will be met by two new schools, one of which is due to open at Montague Park (2016).

2.2.8. Wokingham Town West

- a. No new housing planned with capacity exceeding need for the next 6-7 years.

2.3. Site Sharing and Usage

2.3.1. For some of the schools under consideration, co-location with other services/users presents both an obstacle and an opportunity:

- a. Reuse of school buildings and the relocation of non-school functions could obviate the need for investment in new construction as well as freeing up space and car parking
- b. Any decision to expand a school site with shared use would require an alternative solution (relocation) to be identified for the current service or user concerned.

2.3.2. Current shared site usage includes:

- a. Loddon – West Berkshire Adoption Service and other CS officers based in former infant school building;
- b. Highwood – Annex containing approximately 40 staff from Learning and Disabilities; Social Care for Children; Specialist autism; Special education needs and NHS. Site is convenient for Addington and Bridges;
- c. Beechwood – Ambleside CC, nursery , community centre and CS Neighbourhood team;

2.3.3. The Strategic Assets team are currently carrying out a review of school sites with dual use and the results will be taken into account in any recommendations.

2.4. Consultation

Consultation has been carried out with local school clusters, head teachers, members and parents.

Key concerns for schools are:

- a. That proposals are not a 'quick fix' but are sustainable, future proof and add value;
- b. That existing space deficiencies are addressed in the options appraisal and recommended solution;
- c. The capital works are planned carefully and sensitively to minimise their impact on teaching, children and staff.

As a general rule, provided that the concerns expressed above were addressed schools were supportive of expansion.

2.5. Site Selection

- 2.5.1. For each of the 'hotspot' areas a shortlist of school sites was created based on following criteria:
 - a. Popularity
 - b. Location
 - c. Viability - Need to expand e.g. a school may not viable long term due to its having a small or part PAN eg. 30 or 45.
- 2.5.2. Each school site was then subject to a more detailed appraisal using site, spatial and highways assessments (including the adequacy of car parking) combined with discussions with the schools concerned.
- 2.5.3. The chosen sites were:
 - a. Woodley – Highwood, Rivermead, Beechwood, Woodley CoE
 - b. Earley – Aldryngton, Radstock, Loddon
 - c. South West – see section 3.3 below

2.6. Site Appraisal Factors

Based on the research and feedback from officers, members, schools and parents it was agreed that when carrying out any detailed options appraisal a wider range of factors would be considered than have perhaps been used previously. For example, in addition to the more obvious factors such as access, space and condition we would need to consider such factors as:

- a. Co-location and opportunities to free up space for school use.
- b. Potential crises from under-4s growth and a review of children's centres.
- c. Austerity: all schools are coming under financial pressure and there is an emerging need to consider the future organisation of schools e.g. the viability of schools with PANs which are not multiples of 30.

A full list of the factors being taken into consideration is available in Annex 1.

3. SITE SELECTION

3.1. Earley

Following an analysis of the factors summarised in '3.6' above the preferred sites for expansion are Loddon and Aldryngton:

3.1.1. Loddon

1 FE permanent expansion, in classes Reception and Year 1 commencing in 2016.

- a. Multiple access points to school site
- b. Existing former infants block provides classroom space which if vacated would allow expansion to commence in September 2016. (Reception and Year 1 planned with school)
- c. Would require relocation of council staff and West Berkshire Adoption Service
- d. Use of infants block would reduce disruption to school and minimise impact on outdoor play space
- e. Easiest of the three Earley sites to work with.
- f. Should other sites prove problematic it provides a safety net of a permanent 1FE expansion.

3.1.2. Aldryngton

Expansion from a PAN of 45 to 60

- a. The school currently has a PAN of 45
- b. In order to make it more viable the PAN needs to be decreased to either 30 or increased to 60 (to achieve a more efficient pupil: teacher ratio)
- c. However, with the school being Outstanding, popular with a long waiting list, the ideal solution would be to increase it to a PAN of 60.
- d. However, whilst discussions with highways consultants have confirmed that the expansion of the site may not be as problematic with respect to traffic levels and access as previously thought, the site is one of the more constrained.
- e. It has therefore been concluded that further work should be carried out with the school to determine the feasibility of expansion with a target of September 2017.

3.2. Woodley

Following an analysis of the factors summarised in '3.6' above the preferred sites for expansion are Highwood and Beechwood.

3.2.1. Highwood

Expansion from a PAN of 30 to 60

- a. School has a PAN of 30 which is not really sustainable – a PAN of 60 would be more viable.
- b. There are no issues with space or access.
- c. The school are keen to expand, this being confirmed at a meeting on 2nd December 2016.
- d. There is an existing 'Annex' building on site which is currently occupied by various Children's Services staff (primarily back office functions). If

vacated this would allow expansion to start with minimal investment. However, it will not be possible make this building available until 2017.

- e. As a contingency, the school have confirmed that should more reception places be required in 2016 than are being made available at Beechwood (see below), then they would be able to accommodate 30 reception places if a temporary buildings was provided.

3.2.2. **Beechwood**

Expansion from a PAN of 45 to 60

- a. The School has a PAN of 45 which is not really sustainable – a PAN of 60 would be more viable.
- b. The school and governing body are keen to expand, this being confirmed at a meeting on 2nd December 2016. The school has also confirmed that they can provide 15 reception places without additional accommodation from September 2016.
- c. The site is shared with the Ambleside Children’s Centre CC and a nursery who are also seeking to expand.
- d. Spatial analysis has determined that there is sufficient space to expand without impacting on the CC buildings.
- e. However, the feasibility work for the school expansion should take into consideration the needs of the other services occupying the site in order to achieve the most cost effective solution.

3.2.3. Rivermead has been excluded at this stage at the request of the governing body and head teacher on the grounds that they don’t wish to derail the current improvements in school performance. This position is supported by the School Improvement Service.

3.2.4. Woodley CoE has been excluded due to the site constraints and the current design which makes expansion difficult to configure.

3.3. **South West**

1FE Reception Class from September 2016

3.3.1. Two schools have been agreed in the South of the M4 (Shinfield) SDL:

- a. Shinfield West – which will be built by the developer and will be a 2 FE (60 / 420) place primary school
- b. Spencers Wood - which will be built by WBC and will be 2FE with the option to expand to 3FE.

3.3.2. Both schools are capable of being completed by 2018 but discussions with Planning have indicated that Spencers Wood has is more likely to be delayed. From a place sufficiency perspective and in order to integrate the new schools with the development of the new housing and community needs, initially only one new school will be required and so Shinfield West will be completed by 2018 and Spencers Wood school will be pushed back to 2019 or later.

3.3.3. With the need for reception places from September 2016, a site survey was carried out which demonstrated that there was only one suitable site, namely the former Ryeish Green school site. Two building options are available:

- a. The former 6th Form unit – on land owned by the council – existing modular classroom to be reassigned from another school. This site is currently earmarked for car parking for the new sports hub. The temporary use of the site could, subject to the timetable for the sports hub being confirmed, reduce the amount of parking available in the first year of operation.
 - b. Accommodation within the Oakbank School – leased to the CFBT academy trust.
- 3.3.4. Discussions are underway with the trust to explore option b further. However they have already confirmed that there is sufficient classroom space with dedicated playground and access and that they would be willing to host the facility subject to approval by the DfE. This option would have to be integrated with the procurement of a provider.
- 3.3.5. The working assumption here is that the new school would open for up to 2 years (so up to 60 pupils) before relocating to one of the new schools.

4. Conclusions

- 4.1. This work has confirmed the need for additional places to be available from 2016 in the three areas of Earley, Woodley and the South West as initially reported in July 2015.
- 4.2. The evaluation work and consultation has confirmed the following sites and that the expansion of places will need to be phased:
- 4.2.1. Woodley
 - a. Beechwood – additional 0.5FE from September 2016
 - b. Highwood – additional 1FE from September 2017 (with temporary option for 2016)
 - 4.2.2. Earley
 - a. Loddon – 1FE from September 2016 commencing with Reception and, Year 1.
 - b. Aldryngton – 0.5 FE – subject to further evaluation and discussion with the school from September 2017.
 - 4.2.3. South West – 1FE reception from September 2016
 - a. Ryeish Green site – 1FE Reception from September 2016.
- 4.3. By using existing school buildings which are currently occupied by non-school tenants initial expansions can be delivered relatively easily and with minimal investment.
- 4.4. The work undertaken has shown the benefit of an extended range of data, including council tax accounts, local birth statistics, planning applications and intelligence from the community. It has also shown that some of the data sources need to be broken down from borough to planning area level. Much of this data is not readily accessible and new procedures and resources would be required to access it on a regular basis.
- 4.5. The presence of former school buildings occupied by non-school services on three of the four target sites provides both an obstacle and an opportunity to expand the sites:
- 4.5.1. Use of the buildings for school expansion would reduce the capital investment in the first 1-2 years and allow places to be made available easily in September 2016.
 - 4.5.2. The current utilisation of these buildings is already the subject of an audit and

the relocation of the tenants would fit in with the Council's accommodation strategy for office usage;

- 4.5.3. Coincidentally, the services currently occupying these buildings are also undertaking their own service reviews and it is essential that the detailed feasibility work now required takes these matters into consideration. This integration might impact on the phasing of the works but should in the end produce a more effective and efficient solution.
- 4.6. The schemes set out above establish a solid foundation to meet projected need. Children's services will continue to respond flexibly to live roll and admissions data to ensure sufficient supply of places across all year groups, within its delegated authority.

5. Implementation

- 5.1. Places for **2016** will be delivered as follows:
 - 5.1.1. Beechwood – 0.5 FE 15 reception places – no works required
 - 5.1.2. Loddon – 30 Reception, 30 Year 1 – internal remodelling of infants block to form new classrooms.
 - 5.1.3. South West – 30 reception places – either in Oakbank School (minimal/no works required) or in the former Ryeish Green 6th Form Building which would require refurbishment.
- 5.2. Places for **2017** onwards will be delivered as follows:
 - 5.2.1. Beechwood – expansion works to provide 2FE school – 3 additional classrooms plus additional 'communal' facilities as required - phasing to be determined.
 - 5.2.2. Highwood – 30 Reception places – will require remodelling of 'Annex' and additional build to complete 2FE - phasing to be determined.
 - 5.2.3. Loddon – expansion works to complete 3FE school, Years 2-6 – phasing to be determined.
 - 5.2.4. Aldryngton – 15 Reception places – subject to further evaluation
 - 5.2.5. South West – either:
 - a. A second year as per 5.1.3 above or
 - b. New Shinfield West primary school.
- 5.3. The priority work for 2016 will be:
 - 5.3.1. Loddon
 - a. complete the relocation of the services currently using the infants block
 - b. design and remodelling of infants block for opening Sep'16.
 - 5.3.2. South West
 - a. Agreeing building at Ryeish Green site and completing fit out.
- 5.4. Detailed feasibility studies for schemes as per '5.2' will be carried out in early 2016 and will consider the following:
 - 5.4.1. Design and Construction
 - i. New build
 - ii. Modular
 - iii. Reuse/refurbishment of existing premises
 - iv. Capacity of existing buildings in comparison to Building Bulletin BB103 – e.g. will additional catering or staff facilities be required.
Note that any scheme may use any single or any combination of build approaches and will extend beyond September 2016.
 - 5.4.2. Phasing of expansion
 - i. Need for temporary buildings
 - ii. Phasing of places
 - iii. Phasing of construction to minimise disruption for the school.

5.4.3. Solutions for relocating non-school staff from existing school buildings

- i. Confirmation of current occupants and any tenancy arrangements;
- ii. Discussions with services concerned, identification of alternative locations
- iii. Implementation Plan agreed with Strategic Assets Team.

5.4.4. Traffic Impact

- i. Traffic surveys have already been commissioned as they are required for any planning application.
- ii. New school travel plans will be produced by the schools

5.4.5. School organisation

- i. Implications of expansion on school organisation such as staffing
- ii. School layout and management
- iii. Need for temporary changes

5.5. Consultation

5.5.1. Initial meetings were held with the selected schools on 2nd December to agree overall objectives and further meetings will be held in December and January to develop the best solutions.

5.5.2. In coordination with the Asset Team, consultation will also be carried out with the services currently occupying school buildings at Loddon and Highwood.

5.6. Indicative Timetable

| | |
|-------------------------------|--|
| Initial meetings with schools | 2 nd December 2015 (Loddon, Highwood, Beechwood), |
| Meeting with Earley Parents | 9 th December |
| Follow up school meetings | Loddon - w/c 14 th Dec Others as required |
| Detailed Feasibility | December 2015- February 2016 |
| Relocation of Loddon tenants | Tbc but interim solution may be required |
| Loddon remodelling | Summer 2016 |
| 2017 works commence | tbc 2017 |
| Relocation of Highwood Annex | Tbc 2017 |

FINANCIAL IMPLICATIONS OF THE RECOMMENDATION

The Council faces severe financial challenges over the coming years as a result of the austerity measures implemented by the Government and subsequent reductions to public sector funding. It is estimated that Wokingham Borough Council will be required to make budget reductions in excess of £20m over the next three years and all Executive decisions should be made in this context.

General Fund

| | How much will it Cost/ (Save) | Is there sufficient funding – if not quantify the Shortfall | Revenue or Capital? |
|-----------------------------------|-------------------------------|---|------------------------|
| Current Financial Year (Year 1) | Nil | N/A | Revenue (General Fund) |
| Next Financial Year (Year 2) | Nil | N/A | Revenue (General Fund) |
| Following Financial Year (Year 3) | Nil | N/A | Revenue (General Fund) |

NB – Current Year is 2015/16

Dedicated Schools Grant

| | How much will it Cost/ (Save) | Is there sufficient funding – if not quantify the Shortfall | Revenue or Capital? |
|-----------------------------------|-------------------------------|---|---------------------|
| Current Financial Year (Year 1) | £0 | £0 | Revenue (DSG) |
| Next Financial Year (Year 2) | £601 | £0 | Revenue (DSG) |
| Following Financial Year (Year 3) | £555 | £0 | Revenue (DSG) |

Note that the funding is dependent on agreement with the Schools Forum to the 2016/17 budget.

Capital

| | How much will it Cost/ (Save) | Is there sufficient funding – if not quantify the Shortfall | Revenue or Capital? |
|-----------------------------------|-------------------------------|---|---------------------|
| Current Financial Year (Year 1) | £0 | £0 | Capital |
| Next Financial Year (Year 2) | £3,160 | £0 | Capital |
| Following Financial Year (Year 3) | £3,290 | £ | Capital |

Note the funding is dependent on agreement to the MTFP.

Other financial information relevant to the Recommendation/Decision

Revenue

The table below sets out Revenue (Dedicated Schools Grant) commitments that will extend beyond the next three years.

| Revenue | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019+ | Total |
|--------------|-----------|-------------|-------------|-------------|---------------|---------------|
| Woodley | £- | £26 | £79 | £79 | £289 | £473 |
| Early | £- | £158 | £79 | £79 | £289 | £604 |
| South West | £- | £418 | £398 | £340 | £1,823 | £2,978 |
| Total | £- | £601 | £555 | £498 | £2,400 | £4,054 |

Capital

The table below sets out estimated capital commitments that will extend beyond the next three years.

| Area | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019+ | Total by scheme |
|----------------------|----------|---------------|---------------|-------------|-------------|-----------------|
| Woodley | 0 | £1,610 | £1,920 | £20 | £80 | £3,630 |
| Earley | 0 | £855 | £1,320 | £520 | £100 | £2,795 |
| South West | 0 | £650 | £50 | £50 | £188 | £938 |
| Total by year | 0 | £3,115 | £3,290 | £590 | £368 | £7,363 |

Cross-Council Implications

Yes – some of the proposed solutions may require the relocation of services (primarily children's services) from existing school sites as part of the wider rationalisation of council office accommodation.

List of Background Papers

Annexes:

1. Site appraisal factors
2. Options Appraisal matrix

| | |
|------------------------------------|---|
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| Date 18 January 2016 | Version No. 4 |

SITE APPRAISAL FACTORS

The following range of factors will be taken into account when recommending sites for expansion:

- Spatial analysis of sites
 - feasibility of expansion
 - pre-existing space deficiencies compared to national standard
- Net capacity assessment
- Building condition
 - Outstanding maintenance works – can we gain economies of scale
 - Condition of key elements (roofs, windows, mechanical & electrical systems)
 - ‘Knock-on effect’ of extensions e.g. a need to rewire the school if existing distribution system is altered
- Estates
 - Other site users/occupants
 - Non school buildings available
 - Opportunities at adjacent sites
 - Land ownership e.g. VA/VC status
- Highways assessment
 - Existing site access/additional access
 - Traffic impact
 - Car parking requirements
- Planning conditions, risks and issues , likelihood of objections or opposition, additional costs
- Place and demographic analysis
 - Waiting lists
 - Vacancies
 - National migration statistics, both internal and international
 - Council tax accounts
 - Electoral roll
 - Housing projections
 - Planning applications
 - Local, anecdotal information on such issues as changes in house ownership, family sizes, immigration, sibling groups
 - In addition, pupil place projections are being kept under regular review and are being updated in line with each census.
- Existing PAN admission number
- Financial state and school viability
 - School governance and performance
 - Possibility of academy conversion in short term
 - Possibility of negative impact of any expansion on performance

- School willingness to support/expand
- Consultation feedback
 - Parents group
 - Schools
 - Members
- Integration and interdependence with other strategies, service plans.

Annex 2 – Options Appraisal

| | Aldryngton | Loddon | Radstock | | Beechwood | Highwood | Woodley CoE | Rivermead |
|------------------------------|--|---|---|--|---|---|---|---|
| PAN | 45 | 60 | 60 | | 45 | 30 | 4 5 | 60 |
| Capacity | 0.5 expansion would help to improve financial viability. Inefficient PAN. | | | | 0.5 FE expansion would help to improve financial viability. Inefficient PAN. | 1FE expansion would help to improve financial viability. Inefficient PAN. | 0.5 FE expansion would help to improve financial viability. Inefficient PAN. | Expansion of other 3 Woodley schools is more urgent due to their PAN size. |
| Net capacity | No issues | No issues | No issues | | Net cap currently 42. | No issues | No issues | Currently 53. |
| Places and demography | Full in all year groups with long waiting lists. Local children cannot get into school. Pressure from influx of new families replacing older residents. Nil/minimal places available across all year groups. | Waiting lists in most year groups. Pressure from influx of new families replacing older residents. Nil/minimal places available across all year groups. | Waiting lists in most year groups. Pressure from influx of new families replacing older residents. Nil/minimal places available across all year groups. | | Pressure from new housing. Nil/minimal places available across all year groups. | Pressure from new housing. Nil/minimal places available across all year groups. | Pressure from new housing. Nil/minimal places available across all year groups. | Pressure from new housing. Nil/minimal places available across all year groups. |

Spatial Analysis

| | | | | | | |
|---|--|---|--|--|---|--|
| <p><u>Sufficiency of space</u> - space for 0.5FE expansion which would be relatively straightforward.</p> <p><u>Delivery options</u> - Sufficient space for a modular classroom to allow early expansion/bulge option.</p> <p><u>Accommodation needed</u> - Total 615sqm additional accommodation needed (incl. 300 teaching, 80 hall). Hall would need to be expanded. Remodelling of staff/admin areas needed.</p> <p><u>External space</u> is limited. More all-weather surfaces needed.</p> | <p>1st choice in spatial analysis study.</p> <p><u>Sufficiency of space</u> - Adequate parking and space for additional 1FE even without using Infants building.</p> <p><u>Delivery options</u> - standalone (traditional or modular) solution OK - an extension to the existing building is less feasible. Use of infants building would be much more sensible.</p> <p><u>Accommodation needed</u> - Infants block can provide equivalent of 3 classrooms. Block already houses foundation stage so some reconfiguration of classroom</p> | <p><u>Sufficiency of space</u> - Overall site adequate for 1FE.</p> <p><u>Delivery options</u> - Existing modular buildings to be replaced by traditional extensions.</p> <p><u>Accommodation needed</u> - Additional 558sqm teaching required. Hall would need expanding. Parking should be adequate for expansion.</p> <p><u>External space</u> - additional all weather surface may be required for additional accommodation .</p> | <p>1st Choice in spatial analysis exercise.</p> <p><u>Sufficiency of space</u> -Existing external areas are large enough for 0.5 FE expansion without impacting on Childrens centre.</p> <p><u>Delivery options</u> - Modular, traditional (standalone or extension) options are possible though extension most effective.</p> <p><u>Accommodation needed</u> - Approx. 200sqm additional accommodation (mainly teaching) needed.</p> <p><u>External space</u> - expansion would have minimal impact</p> | <p><u>Sufficiency of space</u> - t space for 1FE expansion without using other non-school buildings on site. Parking capacity good.</p> <p><u>Delivery options</u> - Modular, traditional (standalone or extension) options are possible.</p> <p><u>Accommodation needed</u> - 648sqm teaching space needed but communal facilities thought to be adequate for expansion. Has external annex available but may be needed for children's services.</p> <p>External space - no impact - more than space for expansion.</p> | <p><u>Sufficiency of space</u> - Enough for 0.5FE but building configuration and design makes it difficult to expand efficiently.</p> <p>Parking is limited and has reduced due to kitchen extension.</p> <p><u>Delivery options</u> - traditional build extension possible.</p> <p>Expansion would impact on hard play area, the replacement of which would be difficult due to the playing fields being at higher elevation.</p> <p><u>Accommodation needed</u> - Additional 364sqm teaching space needed.</p> <p><u>External space</u> - site is already deficient in external play.</p> | <p><u>Sufficiency of space</u> - Sufficient space for 1FE expansion. Parking OK. Minimal new build required -</p> <p><u>Delivery options</u> - Modular, traditional (standalone or extension) options are possible.</p> <p><u>Accommodation needs</u> - 128 sqm of teaching reqd. <u>External space</u> - areas exceed BB103 requirement for 3FE school.</p> |
|---|--|---|--|--|---|--|

| | | | | | | | | |
|---|---|---|---|--|--|---|--|--|
| Highways assessment - 1 - general comments | Any expansion can result in an increase in traffic and ultimately all schemes will be subject to the planning process. The sites selected for detailed feasibility will require traffic surveys and new school travel plans producing. So subject to this caveat the site specific features are recorded below. | | | | | | | |
| Highways Assessment - 2 - site specific comments | Concerns about impact of additional traffic on Silverdale road but local view is that additional children will be within walking distance. Will need surveys and robust school travel plan to support planning application. | Potential for any increased traffic to be spread across several entrances. Also possibility of new pedestrian access route. | School located on cul de sac but in the view of highways consultants there would be little interference between school and non-school traffic and that highways officers would be unlikely to object. However, school are of opposite view. | | Pedestrian access is good and local roads are quiet. Single access point via cul-de-sac. Key will be amount of additional traffic. | Potential for additional traffic to be spread over wide area and possible additional access has been identified. Some concerns over Bulmershe Leisure Centre being used as school drop off. | Hurricane Way is already congested and also suffers from 'inconsiderate parking at school start and finish times'. | Addington Gardens access is busy but a second pedestrian access is underused. No options for additional access points. |

| | | | | | | | |
|---------------------------|---|--|--|---|---|---|---|
| Planning | See also 'Highways Assessment 1' above. | See also 'Highways Assessment 1' above. Use of existing buildings will minimise impact. New accommodation will be inside existing building lines | See also 'Highways Assessment 1' above. | See also 'Highways Assessment 1' above. New accommodation likely to be inside existing building lines | See also 'Highways Assessment 1' above. Close to Bulmershe Leisure centre | See also 'Highways Assessment 1' above. Extension could be close to neighbouring houses. | See also 'Highways Assessment 1' above. |
| Building Condition | Awaiting conditions surveys but no major issues with electrical and mechanical infrastructure | Awaiting conditions surveys but no major issues with electrical and mechanical infrastructure | Awaiting conditions surveys but no major issues with electrical and mechanical infrastructure. School are concerned about electrical system. | Awaiting conditions surveys but no major issues with electrical and mechanical infrastructure | Awaiting conditions surveys but no major issues with electrical and mechanical infrastructure | Awaiting conditions surveys but no major issues with electrical and mechanical infrastructure | Awaiting conditions surveys but no major issues with electrical and mechanical infrastructure |

| | | | | | | | | |
|----------------------|---|---|---|--|---|---|---|---|
| Estates | No known issues | Former infants building contains CS staff and West Berkshire Adoption Service who could be relocated in time for Sep'16 usage. | Site contains Community Centre (leased to Earley Town Council). Parking shared. | | Shares site with, and physically linked to Ambleside CC. Also former school space used by Neighbourhood team. | Separate annex currently occupied by various CS teams, approx. 40 staff. Not frontline. Opportunity to relocate but may be difficult by Sep'16. | Diocese owns land and would need to agree to any changes | No known issues |
| School Stance | Concerned about the impact on performance and the level of disruption. Want to see a robust delivery plan with suitable mitigation. | Will expand but concerned about the impact on performance and the level of disruption. Want to see a robust delivery plan with suitable mitigation. | Do not want to expand due to concerns about site access, traffic. | | Very supportive, want to expand | Very supportive, want to expand | Will expand but concerned about the impact on performance and the level of disruption. Want to see a robust delivery plan with suitable mitigation. | Do not wish to expand due to current performance trajectory |

| | | | | | | | |
|---|--|---|--|--|--|---|--|
| Feasibility of Sep'16 implementation | Two options: (1) use existing space for initial 15 places or (2) 'insert' modular building. To be discussed with school. | Good - if infants block is used - current users can be relocated in time for building to be prepared for Sep'16. No new build, just remodelling/ refurbishment. Planning issues limited to traffic/access | Unlikely if existing modular buildings need to be demolished to make space for new build. Sep' 16 provision would require temporary modular solution which would not be value for money. | Good - Wide range of build options available. And site suitable for phasing of construction. Plus initial 15 places can probably be provided from existing accommodation . | Good - Wide range of build options available. And site suitable for phasing of construction. However, the relocation of the current (40) occupants is not feasible for Sep'16 start. | Poor - Traditional build extension solution so timetable tight. Also site for expansion would mean that all works would have to be completed as single scheme. Sep' 16 provision would require temporary modular solution which would not be value for money. | Good - Wide range of build options available. And site suitable for phasing of construction. |
| Scale of investment | Low if (1), relatively costly if (2) | Relatively low, refurb only. Capital investment can be phased. | Relatively high - approx. 600sqm at £ | Relatively low. Approx. 200 sqm @ £xx. Capital investment can be phased. | Relatively high due to current size i.e. 1FE- approx. 700sqm at £ | Relatively high - approx. 400sqm at £ | Relatively low. Approx. 150 sqm @ £xx. Capital investment can be phased. |

Schools Forum Forward Plan 2016

| | |
|-------------|--------------------------------------|
| 16 March | Revenue Monitoring |
| | SEN Alert |
| | Finalise 2016/17 Budget |
| 18 May | Revenue Monitoring |
| | SEN Alert |
| | Education out of school |
| 13 July | Revenue Monitoring |
| | Five Year Plan Update |
| 19 October | Revenue Monitoring |
| | SEN Alert |
| | Draft Proforma for Submission to EFA |
| | Consultation Responses |
| 14 December | Revenue Monitoring |
| | Draft 2017/18 Budget |

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