

TITLE	Development of Wokingham's Two New Special Educational Needs Schools.
FOR CONSIDERATION BY	The Executive on Thursday 29 th June 2023
WARD	(All Wards);
LEAD OFFICER	Deputy Chief Executive - Graham Ebers, Director, Children's Services - Helen Watson
LEAD MEMBER	Leader of the Council - Stephen Conway, Executive Member for Children's Services - Prue Bray

PURPOSE OF REPORT (INCLUDING STRATEGIC OUTCOMES)

The purpose of this report is to update the Executive on plans for the provision of two new Special Educational Needs schools within the Borough and agree the proposed terms of the lease of the site to the Department for Education (DfE).

The proposal will help the Council meet its statutory duties to Children and Young People with Special Educational Needs. It will provide high quality, local special school places at a lower cost than alternative out of borough schools and with reduced transport costs.

As part of the provision of the two new schools, leases for the school sites (owned by Wokingham Borough Council) to the DfE are required and are contractual with the DfE for the delivery of the schools. It is proposed each lease will be for 125 years (standard term for an Academy lease). As it exceeds the Director's delegation under paragraph 11.3.6(e), the approval of any leases for Council owned land for a duration longer than 20 years is an Individual Executive Member Decision under paragraph 5.5.1(f)

RECOMMENDATION

That the Executive:

- 1) Confirm their support for the development and provision of **two** new Special Educational Needs School at Rooks Nest Farm in Finchampstead (as per the Officer's recommendation having reviewed this site against all available sites in WBC ownership)
- 2) Give delegated authority to the Executive Member for Children's Services to approve the lease of these sites to the DfE for use as a Special Educational Needs school on their model Heads of Terms (a copy is in **Appendix A**) and delegate, under 5.4.3 [which applies to all delegations to officers and individual members below] powers to the Director of Resources and Assets, in conjunction with the Leader of the Council, to complete the lease.
- 3) Approve a supplementary estimate of £1.5m for the infrastructure and abnormal costs associated with the delivery of the two new SEND schools. Working with

the DfE, the Council will aim to minimise these costs where possible. Any costs will be funded from the approved capital contingency budget.

- 4) Subject to the DfE approval of WBC's bid to self-deliver the free school capital projects, give delegated authority to the Director of Resources and Assets, in consultation with the Leader of the Council and the Executive Member for Children's Services, to approve the capital development of both schools (5.1.9.2 (b) re Virements over £500k) and the procurement and awarding of the construction works through a competitive procurement process, details to be presented and approved by the Strategic Procurement Board (SPB).
- 5) Give delegated authority to the Director of Children's Services in consultation with the Leader of the Council and the Executive Member for Children's Services, to run the presumption exercise (along with the DfE) to select and enter into leases with a Trust (or Trusts) to manage both schools.
- 6) Give delegated authority to the Director of Resources and Assets, in consultation with the Leader of the Council and the Executive Member for Finance, to approve the infrastructure costs and abnormalities (not funded by the DfE) when these are known.
- 7) To agree that the whole of the Rooks Nest Farm site, which has previously been promoted to the Local Plan Update for residential use with an estimated residential land value of £19.25M, will now not be used for residential use, with the residential land value estimation to be foregone and that the previous promotion of the site for residential development will be withdrawn from the Local Plan Update process.

EXECUTIVE SUMMARY

This report seeks approval for the development of **two** new DfE funded and approved Special Schools (for children with Special Education Needs and Disabilities (SEND) at **Rooks Nest Farm**, and the terms of the lease with the Department for Education for use of this site.

The new schools will help the Council meet its statutory duties to Children and Young People with Special Education Needs. It will provide high quality, local special school places at a lower cost than alternative out of borough independent and non-maintained special schools (INMSS) and with reduced transport costs.

One school will be a special free school, for 100 pupils which includes 12 places at post 16 (4-19yrs) for children with needs related to Social Emotional and Mental Health (SEMH) who could not have their needs met in mainstream schools.

The second school will be a special free school, for 100 pupils which includes 8 places at post 16 (4-19yrs) for children with a range of cognitive disabilities including Severe Learning Disabilities (SLD), Profound and Multiple Learning Disabilities (PMLD), Multi-Sensory Impairments (MSI) and Autism Spectrum Conditions who could not have their needs met in mainstream schools.

Having these two special free schools in Wokingham provides several benefits to the borough, not least the positive impact on children, young people and their families in relation to having access to additional in-borough provision.

The capital cost of the schools will be funded by the DfE; in previous Free School rounds there has been the opportunity for the capital development process to be delegated to the Local Authority. This would be our preferred option in this case as it will give the Local Authority autonomy to make timely decisions without the need to refer back to a third party. An Academy Trust will be appointed by the DfE to run the schools. Revenue funding will come from existing budgets via the Council's High Needs Block of the Dedicated Schools Grant (DSG), through a combination of top slice (recoupment) and direct payment).

Rooks Nest Farm has been identified as the most suitable site for both schools, taking into account availability, site conditions, transport links, local infrastructure and service provision. Feasibility work will be undertaken to confirm the location of the schools within the site, and to prepare initial designs. The site will be subject to a long lease to the Department for Education, proposed at 125 years at nil rent. The terms of the lease need to be approved by the Executive as the proposed length of lease is longer than 20 years.

If the project does not proceed then the Council will need to meet its statutory responsibilities and will continue to provide SEN provision through its existing arrangements. Currently around 33% of pupils with EHCPs are educated out of borough and this proportion is higher for pupils with ASD and SEMH needs; these placements in particular are made up of a high proportion of expensive out of borough independent specialist provision. With a more balanced mix of local provision, many of these placements could be made closer to home, providing better outcomes at lower cost. This also has a knock-on impact on pupils who need to access their education outside of their local community with longer journey times and increased spend on SEN Home to School Transport.

Subject to approval by the Executive, a planning application for the two new SEND schools will be submitted in the new year, once the Trust for each school is selected. The DfE's aim is for the schools to be opened in September 2026.

BACKGROUND

September 2022 report

The report “Special Education Needs and Disability Sufficiency and Safety Valve Programme” to Wokingham’s Executive on 29/9/22 established both a range of issues leading to growing pressure on the High Needs Block budget and actions to reduce spend, while maintaining or improving the quality of provision. The actions included:

- 1.) The submission of a proposal by the Director of Children’s Services in consultation with the lead member for Children’s Services to the DfE for two new Special Free Schools in the borough in October 2022;
- 2.) Supports the recommendation to utilise two sites (part of Rooks Nest Farm, Barkham and part of Gray’s Farm, south of Wokingham) owned by the Council for the provision of two new Special Free Schools and note that the disposal of these sites would be subject to a further Executive decision;
- 3.) Notes the ongoing preparatory work for participation in the national “Safety Valve” intervention programme from September 2022.
- 4.) Notes the development work in progress for further projects to increase special needs provision in the borough.

A copy of this report is attached in **Appendix B**.

Department of Education Funding - New Free Special Schools

Two bids were submitted to the DfE’s latest wave of special free school applications in October 2022 and Wokingham was successfully awarded funding for 2 new SEND Schools in March 2023. A copy of the Bid Offer is in **Appendix C**.

On the 9th May 2023 the DfE officially opening the bidding process for proposers to run all the 33 Free schools that were approved nationally, with the release of their ‘How to apply’ Guidance and publications of each schools’ specifications

The application window will close on the 31st August 2023, with assessments of bids anticipated in October and a final decision to receive ministerial sign off in January 2024. Final decisions on site locations will add significant value to the information we are able to share with proposers and should ensure higher quality bids.

BUSINESS CASE

The 2022 Executive report envisaged the new Free Special Schools being delivered at Rooks Nest Farm and Gray’s Farm. Since the DfE’s approval and awarding of funding, Officers have carried out a review of WBC’s assets to ensure that the sites identified continue to provide the most suitable (in terms of size and location, and deliverable in terms of construction logistics and site constraints) for delivering the two new SEND schools.

The WBC assets identified and reviewed as possible locations for one or both of the schools are:

- Gray's Farm (alongside the proposed sports hub)
- Rooks Nest (locating both schools on the same site)
- Toutley East Field (in lieu of the Care Home)
- Winnersh Farm (adjacent to Oak Tree SEND School)

Appendix D shows location and site plans for each of the options.

Due to the specialist status of the school and the extensive catchment area, which is likely to include pupils from outside the Borough, Children's Services has confirmed there is no need for one or both of the schools to be in a specific location within the Borough. As the designations of the schools differ, there is also no concern that there would be any adverse impact from the schools being in the same location. In reviewing the proposed location of the schools, consideration was given to the ease of access for pupils travelling to and from school and it was noted that having two schools next to each other will enable efficiencies in transporting pupils from home to school. Plus providing two SEND schools in the same location, each with 100 pupils, is no greater than the pupil numbers of a standard primary school (average 240 pupils).

To meet the Department for Education standards, each school site is required to be circa 2ha in size plus transport infrastructure. All of the sites under consideration could accommodate a SEND school, however the developable area of the site at Winnersh Farm only just meets the DfE size requirements meaning that there is less flexibility for any requirements for any additional indoor or outdoor areas, e.g. future extensions, sports facilities and car parking.

A summary of the opportunities and constraints for each of the sites reviewed is detailed in the table in **Appendix E**.

Recommendation

Each of the alternative sites has been considered in detail, and taking into account, availability, site conditions, transport links, local infrastructure and service provision it is recommended that two new Special Education Needs and Disability schools are both located on the Rooks Farm site.

- 1.) Rooks Nest Farm, Finchampstead (SEMH)
- 2.) Rooks Nest Farm, Finchampstead (SLD)

Appendix F provides a plan of the Rooks Nest site. It is envisaged that both SEND schools will be located in Field 1, however this will be subject to further technical assessment and site surveys. Part of the Rooks Nest site (Field 4) is to be used for the provision of the Barkham Solar Farm and the Covid Memorial Wood. The use of this land is not impacted by the recommendation to site both schools at Rooks Nest Farm.

The Executive are also requested to note that the Rooks Nest Site has previously been promoted to the Local Plan update and if WBC had secured residential in line with the

Revised Growth Strategy (270 dwellings) then the value of the land would have been circa £19.25m (based on £2.5m per developable hectare equating to 7.7 ha to deliver the 270 dwelling allocation at a density of 35 dwellings per hectare). The land value could be greater still if WBC were to pursue delivery through a Joint Venture approach, rather than merely selling the site with the benefit of outline planning permission.

School 1: Rooks Nest Farm school (SEMH) proposal details:

The current proposal is:

- **Special Free School Opening September 2026**, for 100 pupils (4-19yrs), designated for children with needs related to Social Emotional and Mental Health problems.
- **Places to be allocated to** Wokingham Borough Council
- **School to be built** on land Rooks Nest Farm; in previous Free School rounds there has been the opportunity for the capital development process to be delegated to the Local Authority, but in this round this remains to be confirmed and it may be that the construction phase is DfE led. Capital costs to be (largely) met by DfE, revenue costs come from commissioning school's DSG (child funding directly from LAs and place funding via top slice from WBC's DSG – see below for balancing mechanism)
- **Expected revenue funding mechanism:** Place funding (currently £10K per place) will be funded from Wokingham's HNB budget allocation. Individual pupil 'top-up' funding will be met from LAs commissioning places (mainly WBC, but potentially also other LAs if Wokingham does not take up all the places). Place funding for any non-WBC pupils will be balanced out through the DfE's annual import/export adjustment.
- **A Trust running the school** to hold a contract with DfE.
- **Designation:** Designated for children with needs related to Social Emotional and Mental Health problems (SEMH)
- **Trust designates:** the DfE will launch of competition for a Trust/Proposer Group to run the proposed school. The school specification, will be published on the local authority's website and by the DfE
- **School to grow** year by year to 100 pupils
- **The aspiration** is that this will become the school of choice for those local children who would otherwise go to high cost independent or non-maintained special schools.

School 2: Rooks Nest Farm School (SLD) proposal details:

The current proposal is:

- **Special Free School Opening September 2026**, for 100 pupils (4-19yrs), designated for children with a range of cognitive disabilities who could not have their needs met in mainstream schools.
- **Places to be allocated to** Wokingham Borough Council
- **School to be built** on land at Rooks Nest Farm; in previous Free School rounds there has been the opportunity for the capital development process to be delegated

to the Local Authority, but in this round, this remains to be confirmed and it may be that the construction phase is DfE led. Capital costs to be (largely) met by DfE, revenue costs come from commissioning school's DSG (child funding directly from LAs and place funding via top slice from WBC's DSG – see below for balancing mechanism)

- **Expected revenue funding mechanism:** Place funding (currently £10K per place) will be funded from Wokingham's HNB budget allocation. Individual pupil 'top-up' funding will be met from LAs commissioning places (mainly WBC, but potentially also other LAs if Wokingham does not take up all the places). Place funding for any non-WBC pupils will be balanced out through the DfE's annual import/export adjustment.
- **A Trust running the school** to hold a contract with DfE.
- **Designation:** Pupils with Severe Learning Disabilities (SLD), Profound and Multiple Learning Disabilities (PMLD), Multi-Sensory Impairments (MSI) and Autism Spectrum Conditions.
- **Trust designates:** the DfE will launch of competition for a Trust/Proposer Group to run the proposed school. The school specification, will be published on the local authority's website and by the DfE.
- **School to grow** year by year to 100.
- **The aspiration** is that this will become the school of choice for those local children who would otherwise go to high cost independent or non-maintained special schools.

Costs

The DfE will fund the construction of the SEND schools. However, the DfE will not fund "abnormal" costs associated with site and ground conditions. This is following scenarios in the past where the DfE have been gifted sites by other local authorities for the construction of schools which have not been suitable for any other uses due to their ground conditions and the DfE has been left with significant costs relating to site mitigation and remediation. Site surveys will be undertaken and areas of known contamination, flood risk and noise impact will be avoided.

The Executive are requested to approve a supplementary estimate of £1.5m for the infrastructure and abnormal costs associated with the delivery of the two new SEND schools. Working with the DfE, the Council will aim to minimise these costs where possible. Any costs will be funded from the approved capital contingency budget.

The DfE has confirmed that sprinklers are now fitted to all DfE SEND schools so they will be included in the construction budget and funded by the DfE.

The DfE builds all SEND schools to their 'Output Specification S21' which embeds net zero carbon in operation and climate resilience. A copy of the DfE technical annex 2J is in **Appendix G**.

Land Value

The part of the site identified for the two schools has an Existing Use Value of £200,000 as farmland (£20k per acre based on 10 acres (4ha)). If this part of the site was developed for residential use, then the value of this part of the site would be circa £10,000,000 (capital receipt based on site developed for residential, at £2.5m per hectare assuming no abnormal ground conditions, encumbrances on title etc). This increase in land value represents the financial contribution from Wokingham Borough Council to the delivery of the school.

FINANCIAL IMPLICATIONS OF THE RECOMMENDATION

The Council faces severe funding pressures, particularly in the face of the COVID-19 crisis. It is therefore imperative that Council resources are focused on the vulnerable and on its highest priorities.

	How much will it Cost/ (Save)	Is there sufficient funding – if not quantify the Shortfall	Revenue or Capital?
Current Financial Year (Year 1)	£1m for construction of highway access. £500,000 risk pot for abnormal costs.	The costs will be funded through the approved capital contingency budget.	Capital
Next Financial Year (Year 2)			
Following Financial Year (Year 3)			

Other Financial Information

Capital Funding

Capital costs of the school build will be met by the DfE following the successful bid(s) made to the Wave Funding round for Free Special Schools.

The Executive is requested to approve a supplementary estimate of £1.5m for the infrastructure and abnormal costs associated with the delivery of the two new SEND schools. Working with the DfE, the Council will aim to minimise these costs where possible. Any costs will be funded from the approved capital contingency budget.

Revenue Funding

For the pupils with an EHCP intended for these schools, revenue costs of their education will be met from the WBC High Needs Block. That will be the case whether the schools are built or not. However, by having good quality, local provision, the revenue costs associated with educating those pupils will be lower, and transport costs associated with ensuring they can access education will also be reduced.

Based on the assumed unit cost of £60k per annum for each pupil placed outside the borough, savings to the High Needs Block are projected to be approx. £4.7m per annum by 2030-31, once both schools are full. In addition, transport savings are estimated at around £1.2m p.a. by 2030-31, when comparing the average cost of transporting pupils to special schools out with the borough compared to those travelling to local schools.

It is proposed that entries to the school are phased over a period of 3 years. The detailed projected annual impact on the HNB and the Home to School Transport budget in the period leading to full use of 190 places by Wokingham Borough Council in 2030-31 is shown at **Appendix H** and summarised below:-

Revenue Savings	Unit Cost Per Pupil	Pupil Nos.	Per annum
Average INMSS placement	£60,000	190	£11,400,000
Equivalent Special School placement Average in borough special school	£35,000	190	£6,650,000
Revenue Saving to High Needs Block			£4,750,000
Average transport cost – out of borough	£16,000	190	£3,040,000
Average transport cost - in borough	£9,300	190	£1,767,000
Revenue Saving to General Fund	£6,700	190	£1,273,000

[1] Based on average cost of nearest equivalent - an Oak Tree School Placement

[2] Based on average cost of an Addington School Placement

Stakeholder Considerations and Consultation

An initial public consultation has been undertaken in April 2023 to set out Wokingham's broad plans for establishing new SEND provision, including the two new special schools. This results of this will establish whether there is support for the proposed developments and whether the Council has prioritised the right plans. This current consultation does not include the location of specific sites within its scope.

Subject to the approval of the Executive, further public consultation on the detailed proposals for the individual SEN schools at Rooks Nest Farm will be undertaken jointly with the Department of Education and the Academy Trusts selected before the submission of a planning application. Public consultation will be carried out as part of the planning application process.

Public Sector Equality Duty

An Initial Equalities Impact Assessment has been undertaken for both schools. This identified no low or high negative impacts on any groups.

Climate Emergency – *This Council has declared a climate emergency and is committed to playing as full a role as possible – leading by example as well as by exhortation – in achieving a carbon neutral Wokingham Borough by 2030*

The design of the school building will be built to the design specification required by the Department for Education which embeds net zero carbon in operation and climate resilience. By providing SEN provision within the Borough this will reduce the distance pupils are required to travel.

Reasons for considering the report in Part 2

n/a

List of Background Papers

None

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Contact Katie Meakin	Service Commercial Property
Telephone 07715 238500	Email katie.meakin@wokingham.gov.uk

Appendices

Appendix A: Heads of Terms

It is proposed that the site for the school be leased to the Department for Education based on their EFA model of a 125-year Free School Lease at a peppercorn rent. The basis of these terms is set out on the Government website at:

<https://www.gov.uk/government/publications/free-schools-utcs-and-studio-schools-model-lease>.

Appendix B: Special Education Needs and Disability Sufficiency and Safety Valve Programme report dated 29/9/22.



Executive report
SEND Sufficiency pa

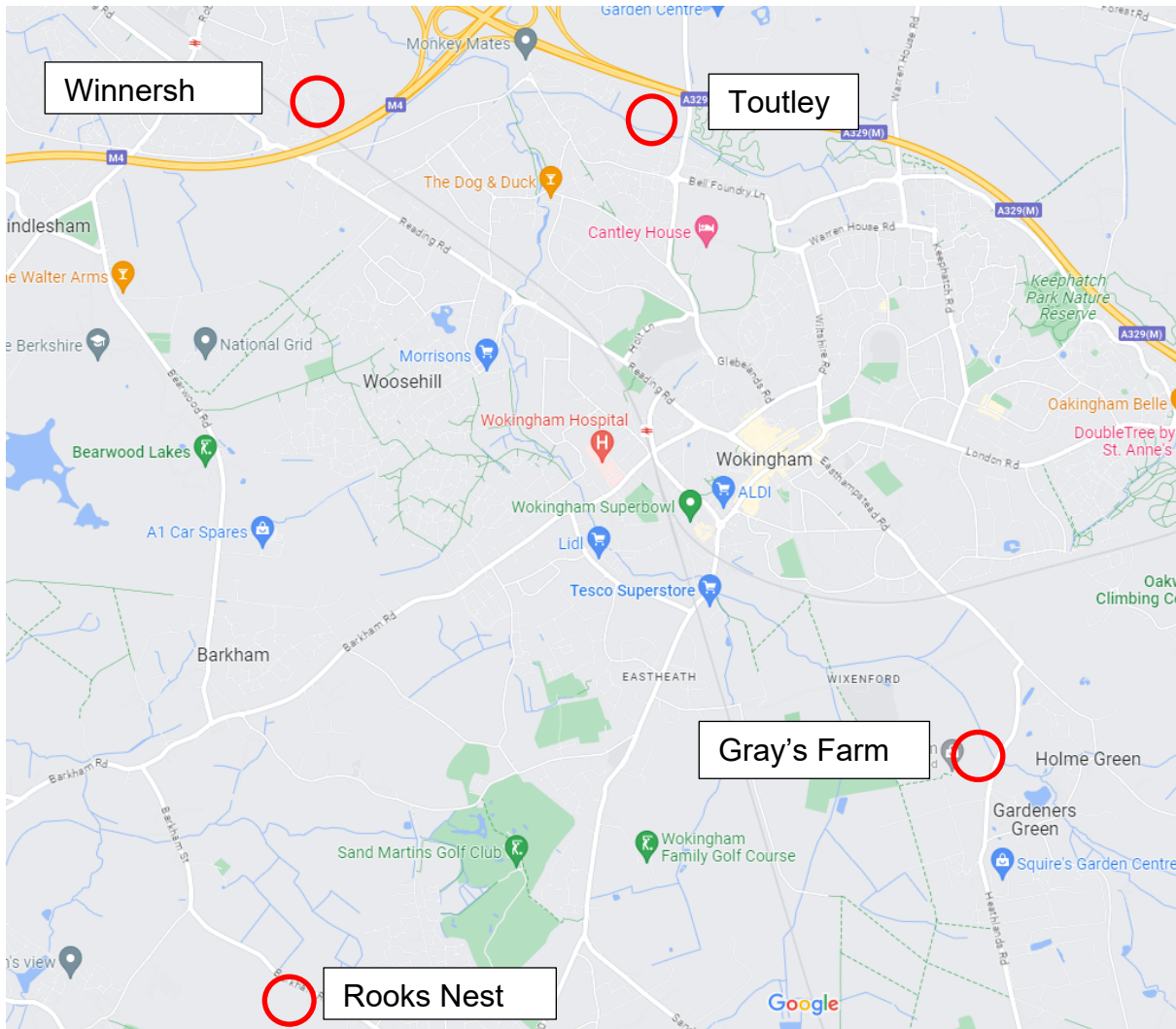
Appendix C: Bid Offer

The DfE's offer (when they invited expressions of interest from local authorities) can be summarised as:

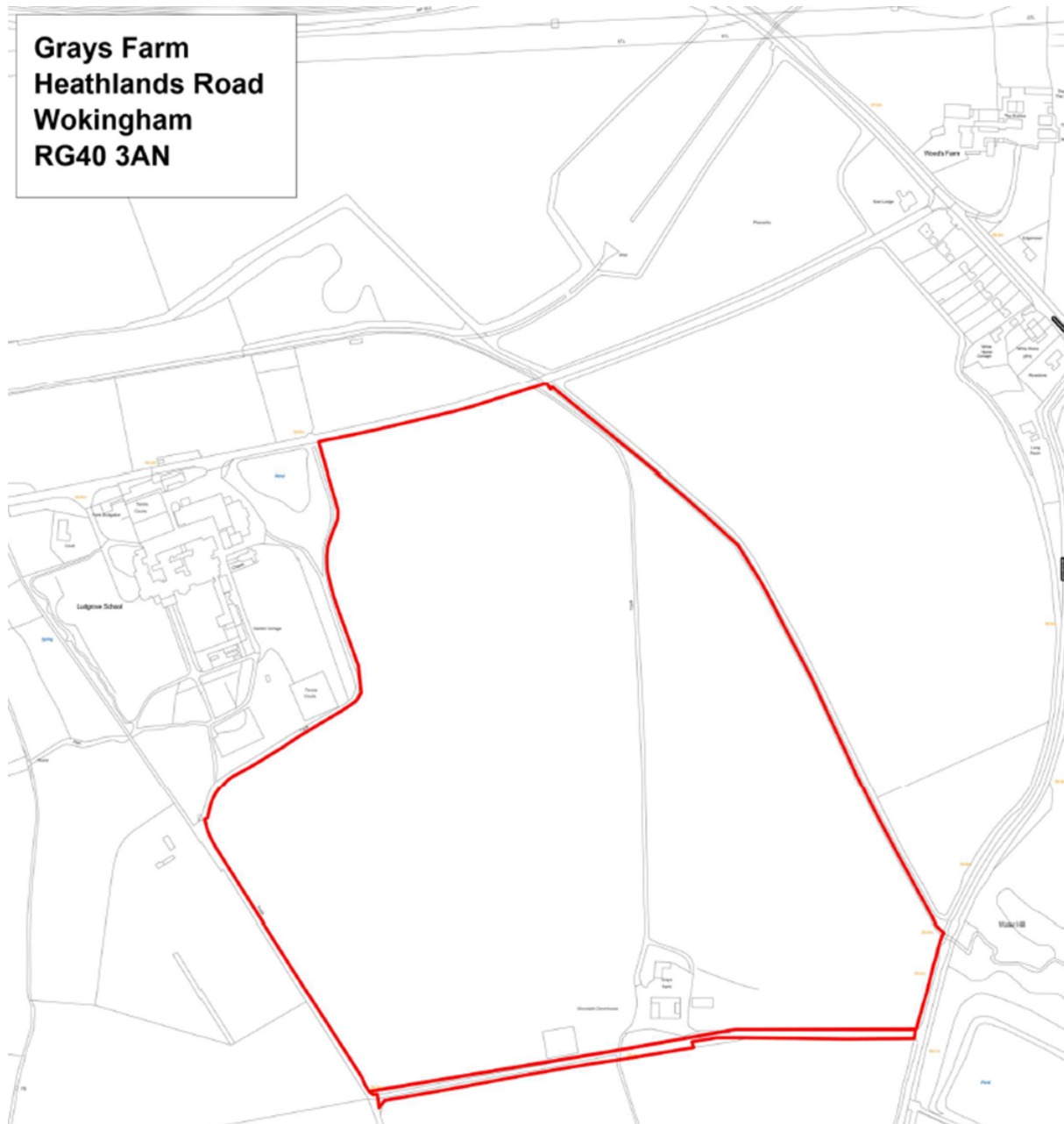
- School to be a Free Special School, built by the DfE on land provided (for free / at a peppercorn rent) by the local authority.
- Sponsor to be appointed by the DfE, but after recommendations by the successful bidder, to operate to a specification written by the successful LA.s
- Scheme depends on the successful councils underwriting revenue costs, by providing guarantees concerning future use, and place and pupil funding.
- While the DfE will build the school, they expect local authorities to pay for abnormal site related development costs. This might be for such matters as ground conditions, flood mitigation or access issues (a non-exclusive list).
- Under the standard DfE funding model for state funded Special Schools, Place funding (£10K per place) comes directly from the DfE, but is top-sliced from the host local authority's HNB budget (the host being the LA within which the school is sited), and pupil funding comes from local authorities commissioning places for individual children. The DfE's "import / export" adjustments (based on £6K per child or young person taking up a funded place) to the HNB ensure that LAs do not suffer because they import children or benefit from being an exporter by adjusting each council's core HNB budget to reflect the balance of in and out of borough local authority place funded provision and usage. Additionally host local authorities receive £4K per place for each child or young person taking up a funded place in their area, irrespective of the child's home local authority.

Appendix D: Location and site plans

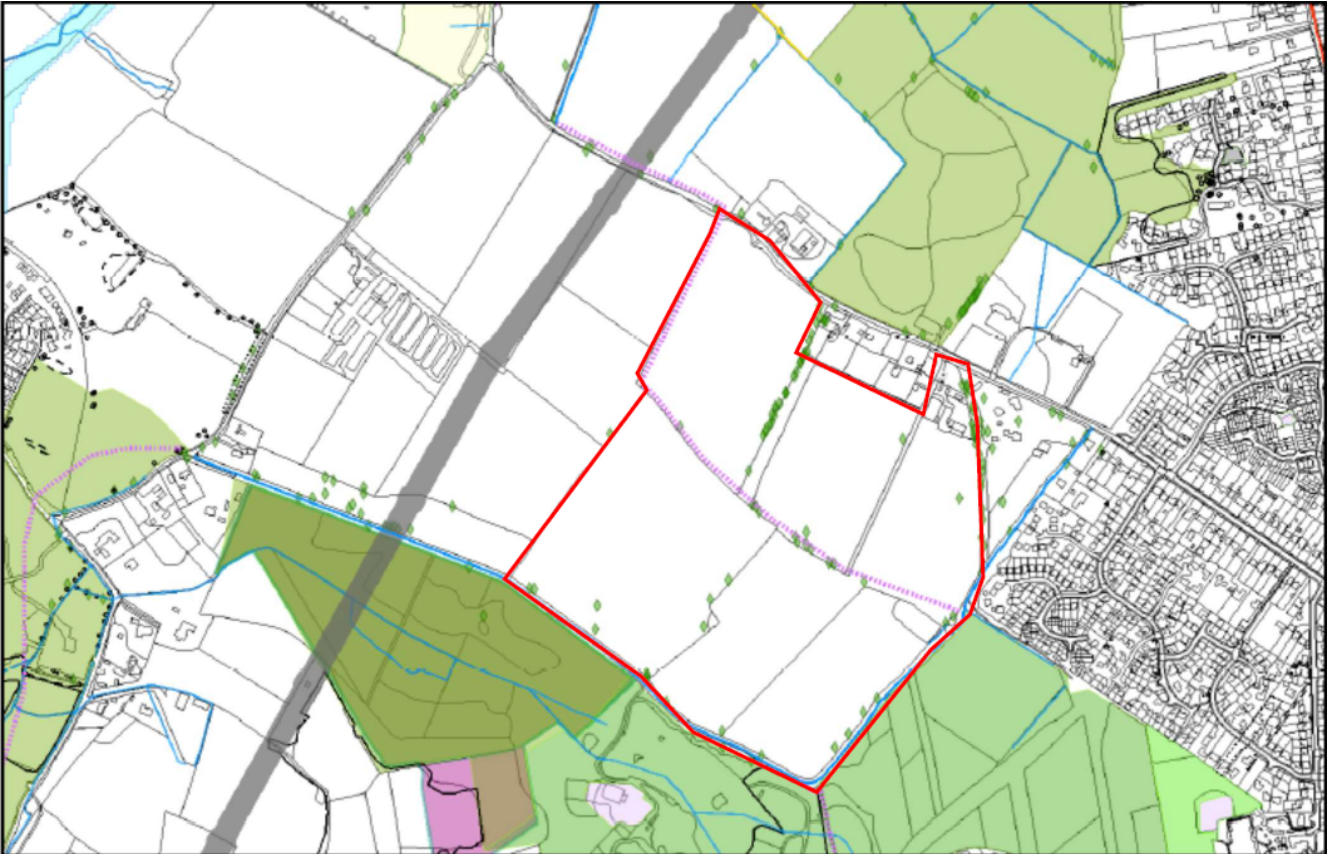
Location Plan - for all four sites



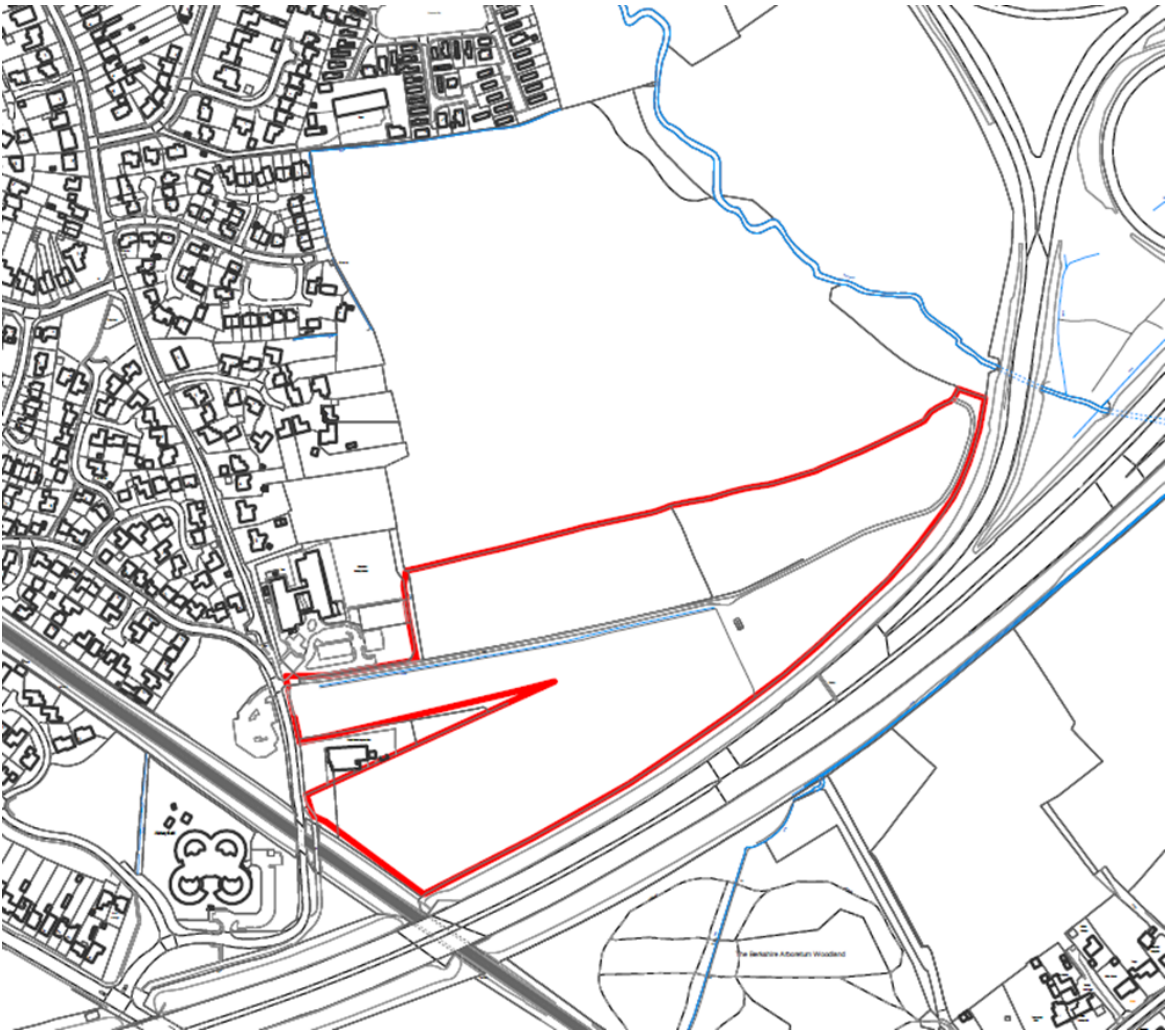
Gray's Farm



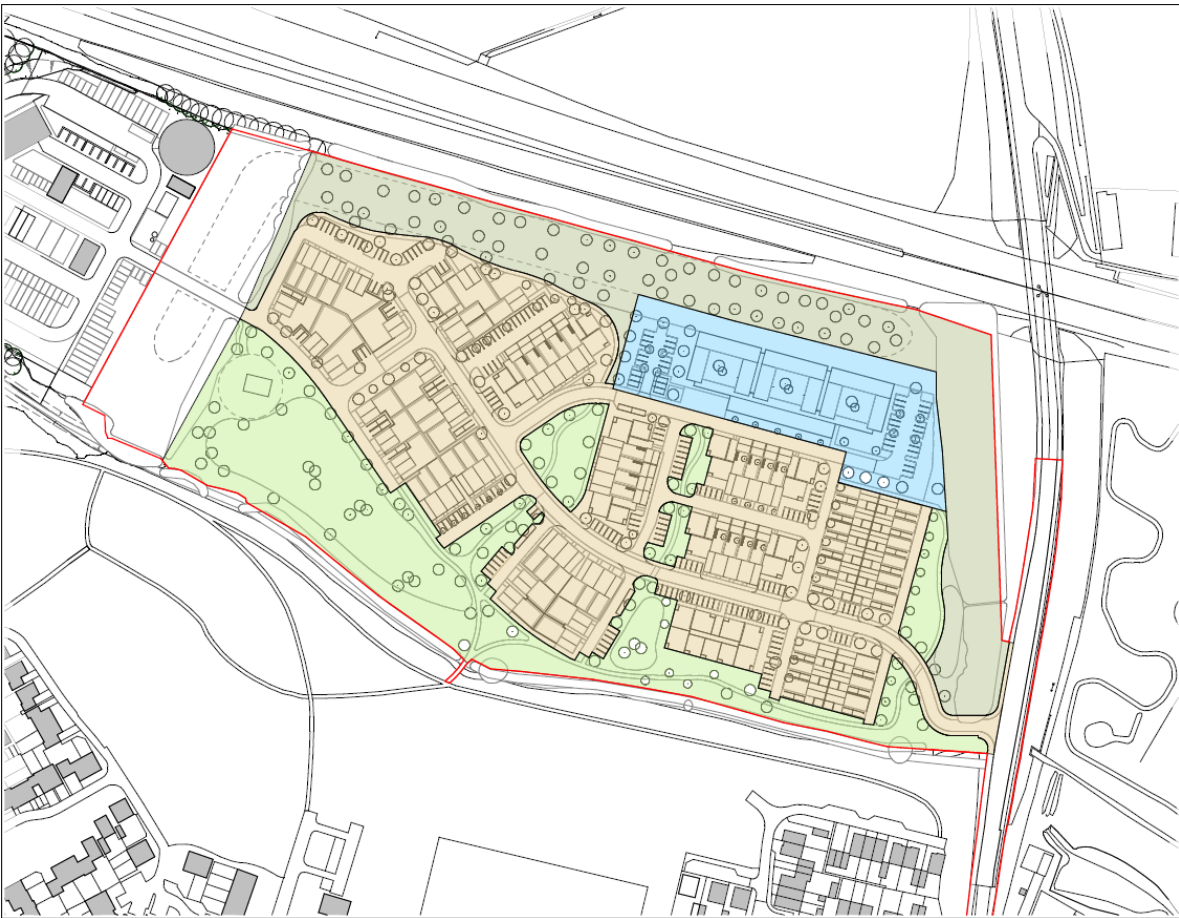
Rooks Nest



Winnersh Farm



Toutley East



Appendix E: Site Appraisal Review

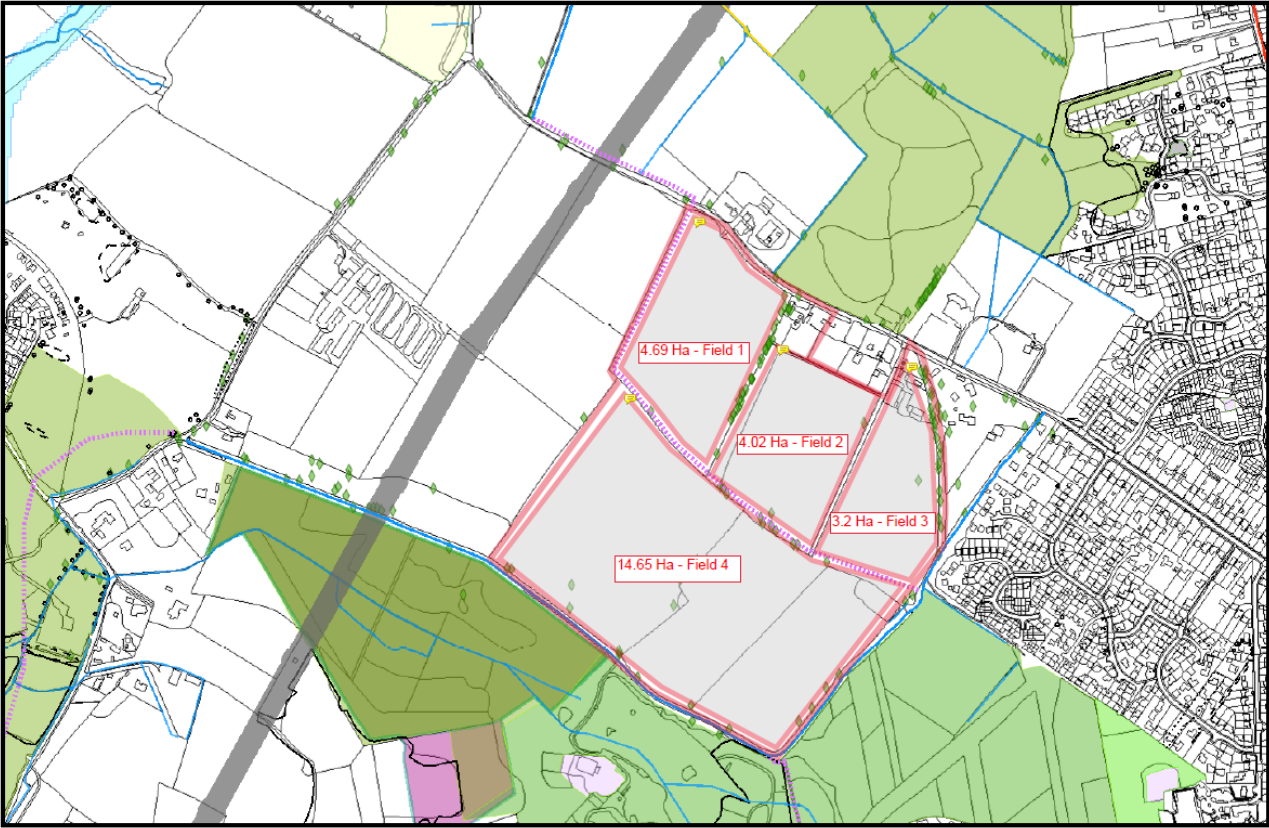
Gray's Farm	
<p>Gray's Farm is located in the south of the borough, adjacent to the Wokingham South Wokingham SDL. It is currently leased from WBC on a 1-year renewable lease, and is used as a PYO fruit farm. The site is located in countryside outside the settlement boundary of Finchampstead. It has been promoted in the Local Plan Update for outdoor and indoor sports and community facilities use. Vehicular access to the site is via Heathlands Road, although it is proposed that any future development on this site will be linked with a pedestrian/cycle link from the SDL.</p>	
Opportunities	Constraints
<ul style="list-style-type: none"> - If it were feasible and supportable, in planning terms, to accommodate both the proposed sports hub and SEND school on this site, there may be an opportunity to share the use of some facilities (e.g. playing pitches, parking, access road etc). This could offer opportunities for both short break activities and potentially post 16 internships. - There may also be an opportunity to share construction and infrastructure costs as well as risk. - If not all of the site is required for the provision of the sports hub, a SEND school would make good use of the remaining land. 	<ul style="list-style-type: none"> - It is not yet known what area is required for the sports facilities here, and therefore whether the site is large enough to provide for both the proposed sports hub and a SEND school. - Until the proposals for the sports hub have been finalised and Sports England funding secured, there is uncertainty around the deliverability of the sports hub and this could impact on the deliverability of the SEND school - Based on existing assessments by the sports hub project team, there are concerns about the access to and from the site in regard to the width of the road, and the capacity of the local junctions to cope with additional traffic. Highway improvements, cycle and pedestrian links may be required. - The site is also currently being investigated to establish whether the northern parts of the site are available and suitable to provide some additional flood attenuation for the South Wokingham Distributor Road. Use of this part of the site has the potential to offer a significant cost reduction for the SWDR but would further constrain the available land for the SEND school.

Rooks Nest Farm	
<p>Rooks Nest Farm is located in the south of the borough on the northern edge of Finchampstead. The site is outside of the settlement boundary, and although it has no formal allocation for development in the local plan, the previous Exec report identified this site as one of the sites to be included in the application for DfE funding for a SEND school. The site is accessed via Barkham Ride.</p>	
Opportunities	Constraints
<ul style="list-style-type: none"> - Both schools could be located on this site - this would result in significant cost savings on the infrastructure provision. - There are potential time and cost savings to the design and planning process by submitting the dual school proposal as a single application. - Option to create an educational hub. - Potential management and admin savings across the two schools (but only if both run by the same Trust). - Large site which could accommodate two schools as well as the land required for the Barkham Solar Farm and the Covid Memorial Wood. Developable land is 11.9ha, however it is envisaged both schools could be sited in Field 1 which is 4.69ha (see Appendix F). The remaining use of site is not determined however options could include woodland extension, solar farm extension, allotments or farmland. - The school entrance would not be in a residential area, so less conflict at busy times. - Opportunity exists to link the site to existing local bus service network by providing bus stops at the site frontage - The existing footway at Barkham Ride presents opportunity to connect the site to the existing pedestrian network without the need for costly and invasive highway works. - Local infrastructure allows access from all parts of the Borough, with good transport links from all directions including the A327. - Opportunity for development on remainder of the site which could offset the costs associated with the infrastructure and abnormals. 	<ul style="list-style-type: none"> - Loss of best and most versatile agricultural land – this will to be justified by the community benefit. - Potential capital receipt of circa £10m if the land allocated for the two SEND schools was sold for residential (based on £1m per acre assuming no abnormal ground conditions, encumbrances on title etc).

Winnersh Farm	
<p>The Winnersh Farm site is located on unused green space on the eastern boundary of Winnersh, adjacent to the M4 motorway. The site is outside of the settlement boundary and has no formal allocation for development in the local plan but was identified as a site for 250 new houses in the draft local plan update (2020). The Oak Tree SEND school is currently being developed on part of the site and is due to open in September 2023.</p>	
Opportunities	Constraints
<ul style="list-style-type: none"> - This site is currently promoted to the local plan process for inclusion as a housing site. The testing process for the Local Plan Update (LPU) has already judged the site to be suitable for development. - The highway authority previously raised no objection to significant scale residential development on the site. - Connection to sustainable modes of transport is via Reading Road and Winnersh rail station - Political support for SEND provision on this site been unanimously positive to date. - Option to create an educational hub with existing Wheatfield Primary School and SEND school. - Management of SEND schools could be shared across the whole site (executive head and shared admin staff), but only if both run by the same Trust. - Site access already in place and some surveys undertaken (reduction in costs, risk and time). - There remains potential for some development on the remainder of the site to off-set the infrastructure costs and abnormalities associated with the school. - this site may be easier/quicker to progress than Gray's Farm and Rooks Nest Farm as some of the infrastructure is in place. 	<ul style="list-style-type: none"> - The developable area of the site (1.89ha) only just meets the DfE size requirements to accommodate a SEND school, meaning less flexibility for any requirements for any additional indoor or outdoor areas, e.g. future extensions, sports facilities and car parking. - Site located close to motorway – design needs to take into account proximity to the motorway (noise and air quality impacts). The noise from the motorway may have an adverse effect on some of the pupils due to their additional needs. - A third school in close proximity will increase trip-rates at peak times to potentially unsustainable levels particularly as most will come by bus or car rather than walk. - Access to and from site restricted by left turn only from Woodward Close onto Reading Road which may result in traffic on surrounding local roads and the North Wokingham Distributor Road. - Planning constraints include a large, protected oak in the centre of the site, an ancient hedgerow to the northern boundary requiring a 5m buffer zone (reducing the developable site area to 1.89ha), ground contamination and a likelihood of bats. - Potential capital receipt of circa £5m if the land allocated for the SEND school was sold for residential (based on £1m per acre assuming no abnormal ground conditions, encumbrances on title etc). - The funding from the OPE and Land Release Fund will be withdrawn if a SEND school is constructed instead of residential or care home. - If the site is used for a SEND school use, then money spent to date on promotion and design of the site for residential use will be unable to be recouped.

Toutley East	
<p>The Toutley East site is located in Matthewsgreen, within the North Wokingham SDL and has recently secured planning permission for residential development and a care home. The care home programme is currently under review and subject to a decision on the care home the site is available immediately.</p>	
Opportunities	Constraints
<ul style="list-style-type: none"> - Site available immediately subject to a decision on the care home. - Site sits within settlement limits as part of the North Wokingham Strategic Development Location. Principle of development on the site has already been established as acceptable. - Infrastructure costed and surveys already undertaken 	<ul style="list-style-type: none"> - Site located close to motorway – design needs to take into account proximity to the motorway (noise and air quality impacts). The noise from the motorway may have an adverse effect on some of the pupils due to their additional needs. - Potential capital receipt of circa £5m if the land allocated for the SEND school was sold for residential (based on £1m per acre assuming no abnormal ground conditions, encumbrances on title etc) - Risk of planning delays are high due to the requirement of consultation with the Environment Agency.

Appendix F: Rooks Nest Farm



Appendix G: Technical Annex 2J

Technical Annex 2J provides the minimum requirements for sustainability. It responds to the demands of Climate Change and aims to mitigate the effects and recognise adaptations required in educational establishments for a changing environment. This document focuses on the path to reduce carbon emissions within the DfE estate to zero.



FE-OS_Annex_2J-Sustainability-A-C03.ppt

Appendix H: High Needs Block Budget

The HNB budget allocation is set by the DfE, as part of overall Dedicated Schools Grant (DSG) funding received by the Council and has not kept pace with increasing costs. Consequently, there is a significant, and still increasing, deficit on the HNB. While the HNB deficit cannot currently be funded from the General Fund under statutory override regulations in place, longer term removal of that protection brings significant financial risk to the Council. The approved Safety Valve agreement in place between Wokingham Borough Council and the DfE sets out ambitious plans to deliver financial sustainability for the DSG and a balanced in year position by 2028/29. Delivery of increased specialist, local provision for our most vulnerable children and young people is key to the success of that programme, with successful milestones unlocking a total of £20m additional Safety Valve funding from the DfE.

Regular reporting on the Safety Valve Programme will include the benefits and outcomes of the 2 new schools proposed.

Managing growth

The Safety Valve programme will introduce a range of different interventions between 2023-29 designed to address increasing demand and the two new special free schools form a part of that package of measures. A number of these measures are designed to reduce demand for EHC Plans through earlier intervention and this will impact on demand for special school places; it is therefore essential that the viability of these school proposals are 'stress tested' within the 'mitigated' growth models factoring in the impact of Safety Valve.

Table D1 below sets out the projected growth in the number of WBC pupils with EHCPs allowing for the impact of the Safety Valve programme according to types of provision. This shows significant expansion of specialist provision (including but not limited to the new Free Schools) and a major reduction in the use of INMSS.

Table D1 – ‘Mitigated’ Projections for total number of WBC pupils with EHCPs by provision type							
Jan	2023	2024	2025	2026	2027	2028	% Increase 2018-23
Mainstream schools / academies	746	806	835	842	869	897	20%
Resourced Provision / SEN Units	60	65	84	85	88	92	53%
Maintained special schools / academies	326	379	424	462	534	608	87%
NMSS or independent schools	145	130	87	78	51	24	-83%
Hospital schools or Alternative Provision	61	66	73	74	77	80	31%
Post 16	361	390	404	408	424	441	22%
Other	97	103	102	78	65	50	-48%
Total number of EHCPs by placement type	1,796	1,939	2,009	2,027	2,108	2,192	
ANNUAL GROWTH		8%	4%	1%	4%	4%	

The tables below show how needs can be met, with the two new schools enabling the area to reduce reliance on INMSS provision (the figures below factor in non-WBC pupils and are therefore higher than those in Table D1 above).

Table D2 Planned Expansion of Wokingham’s Local Special School Provision:

Planned Places September	Actual 2022	Planned 2023	2024	2025	2026	2027	2028	2029	2030
Chiltern Way	64	64	64	64	64	64	64	64	64
Addington School	262	276	303	303	303	303	303	303	303
Oak Tree	0	24	59	69	75	75	75	75	75
New Free School 1 (SEMH)					25	50	75	95	95
New Free School 2 (Cognitive Needs)					25	50	75	95	95
Special School Total	326	364	426	436	492	542	592	632	632

Table D3 – Projected Future EHCPs by Provision Type – Mitigated Scenario:

The planned expansion of existing special schools alongside the development of the two new Special Free Schools would enable Wokingham to achieve the following mix of provision in the coming years. The total number of EHCPs in the mitigated scenario is considerably lower than the figures set out the ‘unmitigated’ projections earlier in this report but even in this scenario there is no question that the new schools will be required.

Jan	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Mainstream schools or academies	299	315	360	492	641	746	806	835	842	876	911
Resourced Provision or SEN Units	47	54	58	60	64	60	65	84	85	88	92
Maintained special schools or special academies	260	264	275	283	326	326	379	424	437	484	533
NMSS or independent schools	68	72	81	89	86	145	130	87	78	51	24
Hospital schools or Alternative Provision	11	20	54	39	55	61	66	73	74	77	80
Post 16	163	166	207	216	235	361	390	404	408	424	441
Other	19	43	43	91	81	97	103	102	103	107	111
Total number of EHCPs by placement type	867	934	1,078	1,270	1,488	1,796	1,939	2,009	2,027	2,108	2,192

Financial benefit

The principles behind special school funding (and other commissioned places for children and young people) are that commissioned places at state sector schools receive 'Place' funding of £10K per child in a Special School provided by host local authorities and 'Top-Up' funding is paid for each child or young person on a school's roll (rates are variable depending on need and are funded by the Local Authority making the placement). An import / export adjustment ensures that local authority payments are balanced. Places in the Independent and Non-Maintained Special School (INMSS) sectors do not receive place funding – all costs are met from what would be Top-Up in the state sector. Reduced reliance on very high cost INMSS sector will help reduce pressure on the High Needs Block (HNB). Local provision will also reduce the burden on the Home to School Transport Budget.

319 Using projections based on current spending the likely impact of the new schools is set out in the table below. This is based on all the new school places taking the place of alternative high cost placements; given that all existing local specialist capacity is full this is not an unreasonable assumption. For the investment in the schools to be effective it is critical that cost per place (Place funding plus Top-Up) is kept below the level of the alternative placement options (particularly independent & non-maintained special schools (INMSS)) that would otherwise have to be used.

For this exercise a range of scenarios have been projected using different figures for the cost of alternative placements. The current average across all INMSS placements is £60k per child per year but this varies enormously; the average figure for ASD and SEMH placements in INMSS and Specialist Post 16 settings is in fact over £163k but this factors in a number of very high cost placements that are likely out of scope for the new schools, so the more conservative estimates of impact are applied here. Therefore a range of scenarios have been modelled using a range of alternative provision costs as follows:

Scenario 1 - Based on the assumed unit cost of those pupils placed out with the borough due to lack of capacity in WBC special schools of £60K p.a. for projected future placements, savings to the High Needs Block are projected of approx £4.7m p.a. by 2030-31, once both schools are full.

Scenario 2 - Based on unit costs of alternative provision of £50K p.a. for projected future placements, savings to the High Needs Block are projected of £2.8.m p.a. by 2030-31, once both schools are full.

Scenario 3 - Based on unit costs of alternative provision of £40K p.a. for projected future placements, savings to the High Needs Block are projected of £1m p.a. by 2030-31 once both schools are full.

2 FREE SCHOOLS - SCENARIOS FOR COSTS AND SAVINGS												
	YEAR OF IMPACT	1	2	3	4	5	6	7	8	9	10	10 YEAR TOTAL
		2026/27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35	2035-36	
A	Place Cost per place	10000	10000	10000	10000	10000	10000	10000	10000	10000	10000	
B	No of Places - Both Schools	50	100	150	190	190	190	190	190	190	190	
C	Total Place Funding	£ 500,000	£ 1,000,000	£ 1,500,000	£ 1,900,000	£ 1,900,000	£ 1,900,000	£ 1,900,000	£ 1,900,000	£ 1,900,000	£ 1,900,000	
D	WBC Pupils on roll - School 1	25	50	75	95	95	95	95	95	95	95	
E	WBC Pupils on roll - School 2	25	50	75	95	95	95	95	95	95	95	
F	Top-Up Costs - School 1	£ 25,000	£ 25,000	£ 25,000	£ 25,000	£ 25,000	£ 25,000	£ 25,000	£ 25,000	£ 25,000	£ 25,000	
G	Top Up Costs - School 2	£ 20,000	£ 20,000	£ 20,000	£ 20,000	£ 20,000	£ 20,000	£ 20,000	£ 20,000	£ 20,000	£ 20,000	
H	TOTAL COST TO WBC (C +(d*f)+(e*g)	£ 1,625,000	£ 3,250,000	£ 4,875,000	£ 6,175,000	£ 6,175,000	£ 6,175,000	£ 6,175,000	£ 6,175,000	£ 6,175,000	£ 6,175,000	£ 52,975,000
I	Basic Entitlement Rate	-£ 4,000	-£ 4,000	-£ 4,000	-£ 4,000	-£ 4,000	-£ 4,000	-£ 4,000	-£ 4,000	-£ 4,000	-£ 4,000	
J	Basic Entitlement Total (B*H)	-£ 200,000	-£ 400,000	-£ 600,000	-£ 760,000	-£ 760,000	-£ 760,000	-£ 760,000	-£ 760,000	-£ 760,000	-£ 760,000	
K	Import Export Adjustment per place	-£ 6,000	-£ 6,000	-£ 6,000	-£ 6,000	-£ 6,000	-£ 6,000	-£ 6,000	-£ 6,000	-£ 6,000	-£ 6,000	
L	NON WBC Pupils on roll	0	0	0	0	0	0	0	0	0	0	
M	IMPORT EXPORT ADJUSTMENT TOTAL (K*L)	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	
N	Effective Value of Import Export adjustment plus basic entitlement (J+M)	-£ 200,000	-£ 400,000	-£ 600,000	-£ 760,000	-£ 760,000	-£ 760,000	-£ 760,000	-£ 760,000	-£ 760,000	-£ 760,000	
O	TOTAL COST TO WBC (H+N)	£ 1,425,000	£ 2,850,000	£ 4,275,000	£ 5,415,000	£ 5,415,000	£ 5,415,000	£ 5,415,000	£ 5,415,000	£ 5,415,000	£ 5,415,000	£ 46,455,000
Scenario 1												
P	Comparator Place Unit Costs	£ 60,000	£ 60,000	£ 60,000	£ 60,000	£ 60,000	£ 60,000	£ 60,000	£ 60,000	£ 60,000	£ 60,000	
Q	TOTAL COST OF COMPARATOR PROVISION	£ 3,000,000	£ 6,000,000	£ 9,000,000	£ 11,400,000	£ 11,400,000	£ 11,400,000	£ 11,400,000	£ 11,400,000	£ 11,400,000	£ 11,400,000	£ 97,800,000
R	SCENARIO 1 SAVING	£ 1,575,000	£ 3,150,000	£ 4,725,000	£ 5,985,000	£ 5,985,000	£ 5,985,000	£ 5,985,000	£ 5,985,000	£ 5,985,000	£ 5,985,000	£ 51,345,000
Scenario 2												
P	Comparator Place Unit Costs	£ 50,000	£ 50,000	£ 50,000	£ 50,000	£ 50,000	£ 50,000	£ 50,000	£ 50,000	£ 50,000	£ 50,000	
Q	TOTAL COST OF COMPARATOR PROVISION	£ 2,500,000	£ 5,000,000	£ 7,500,000	£ 9,500,000	£ 9,500,000	£ 9,500,000	£ 9,500,000	£ 9,500,000	£ 9,500,000	£ 9,500,000	£ 81,500,000
R	SCENARIO 2 SAVING	£ 1,075,000	£ 2,150,000	£ 3,225,000	£ 4,085,000	£ 4,085,000	£ 4,085,000	£ 4,085,000	£ 4,085,000	£ 4,085,000	£ 4,085,000	£ 35,045,000
Scenario 3												
P	Comparator Place Unit Costs	£ 40,000	£ 40,000	£ 40,000	£ 40,000	£ 40,000	£ 40,000	£ 40,000	£ 40,000	£ 40,000	£ 40,000	
Q	TOTAL COST OF COMPARATOR PROVISION	£ 2,000,000	£ 4,000,000	£ 6,000,000	£ 7,600,000	£ 7,600,000	£ 7,600,000	£ 7,600,000	£ 7,600,000	£ 7,600,000	£ 7,600,000	£ 65,200,000
R	SCENARIO 3 SAVING	£ 575,000	£ 1,150,000	£ 1,725,000	£ 2,185,000	£ 2,185,000	£ 2,185,000	£ 2,185,000	£ 2,185,000	£ 2,185,000	£ 2,185,000	£ 18,745,000

To have a significant impact on the overall HNB spend, it is essential that the new Free Schools are able to cater for pupils who would otherwise be placed in an INMSS setting. A key risk is that the school does not become the school of choice and that children and young people who should be placed there, in fact continue to be placed at Independent Special Schools (with the agreement of the Local Authority or through Tribunal decisions); the school needs to be well promoted to the local community of parents of children with SEND. For the financial impact to be effective depends on (a) the Trust creating a school that does offer flexible and high-quality places that are popular and do meet needs and (b) robust (and well resourced) processes to resist unnecessary high cost placements.

Home to school transport spend will also be reduced. On the basis of the average cost of transporting a child out of the borough is in the order of £16k, but only £9K within the borough, the potential savings per year would be:

SEN TRANSPORT SAVINGS	1	2	3	4	5	
Financial Year	2026-27	2027-28	2028-29	2029-30	2030-31	Projected over 5 years
WBC Pupils on roll - School 1	25	50	75	95	95	
WBC Pupils on roll - School 2	25	50	75	95	95	
TOTAL PUPIL Nos.	50	100	150	190	190	
Average Transport Cost out of Borough	£16,000	£16,000	£16,000	£16,000	£16,000	
Average Transport Cost In Borough	£9,300	£9,300	£9,300	£9,300	£9,300	
Full Year Revenue Saving to General Fund per pupil	£6,700	£6,700	£6,700	£6,700	£6,700	
TOTAL TRANSPORT SAVING	£195,000	£530,000	£865,000	£1,161,000	£1,273,000	£4,024,000

* Number on roll from September each year therefore saving calculated as part year impact in each financial year until school(s) full

Current and Future needs

Growth in the number of children and young people with EHCPs has accelerated over the period 2018 to 2023 with the total numbers more than doubling and there has been a 21% increase in the last year alone.

Jan	2018	2019	2020	2021	2022	2023	% Increase 2018-23
Total number of EHCPs	867	934	1078	1270	1488	1796	107%
Annual Growth		8%	15%	18%	17%	21%	

There has been significant growth in comparator areas but not at the pace of Wokingham's increases – the table below sets out the change between 2018-22 (2023 figures are not yet available for other areas)

	Wokingham	South East	England	Statistical Neighbours
Total across all ages	14.5%	11.1%	10.3%	12.5%

Within this overall growth, WBC's increasing number of EHCPs for particular categories of need are particularly stark with SLCN, SEMH, and ASD rising particularly quickly between 2018-23 with increases of 201%, 155% and 106% respectively (there have been large increases in other needs but these have lower volumes, so the growth is less significant).

Jan	2018	2019	2020	2021	2022	2023	% Increase 2018-23
Autistic Spectrum Disorder	343	374	442	515	583	706	106%
Social, Emotional and Mental Health	156	170	215	253	322	398	155%
Speech, Language and Communications needs	61	69	80	116	157	184	201%
Moderate Learning Difficulty	96	91	97	120	135	166	73%
Severe Learning Difficulty	77	89	96	99	94	105	37%
Physical Disability	50	50	53	58	61	75	50%
Other Difficulty/Disability	4	4	6	14	42	49	1118%

Table A3 - Total number of EHCPs by primary need								
	Jan	2018	2019	2020	2021	2022	2023	% Increase 2018-23
Profound & Multiple Learning Difficulty		33	35	38	37	35	38	15%
Hearing Impairment		23	26	26	29	27	34	47%
Specific Learning Difficulty		20	21	20	19	23	29	45%
Visual Impairment		2	3	3	8	7	8	315%
Multi- Sensory Impairment		2	2	2	2	2	3	34%
Total number of EHCPs		867	934	1078	1270	1488	1796	107%

It is notable that these significant increases in volumes of pupils with EHCPs have NOT seen corresponding expansion in local state-funded specialist provision (special schools or resourced SEN provision) – see Table A4 below. The increasing volumes of pupils with EHCPs have largely been catered for within mainstream schools and increasingly in independent and non-maintained special schools. Is it increasing use of this latter category or provision that is particularly driving the increasing spending patterns.

Table A4 - Total number of EHCPs by provision type								
	Jan	2018	2019	2020	2021	2022	2023	% Increase 2018-23
Mainstream schools / academies		299	315	360	492	641	746	149%
Resourced Provision / SEN Units		47	54	58	60	64	60	28%
Maintained special schools / academies		260	264	275	283	326	326	25%
NMSS or independent schools		68	72	81	89	86	145	113%
Hospital schools or Alternative Provision		11	20	54	39	55	61	455%
Post 16		163	166	207	216	235	361	121%
Other		19	43	43	91	81	97	411%
Total number of EHCPs by placement type		867	934	1078	1270	1488	1796	
			8%	15%	18%	17%	21%	

Source data: 2018 to 2022 – SEND2 returns. 2023 SEND2 data set, prior to submission date still subject to minor amendments.¹

¹ [Special educational needs in England: January 2022 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/special-educational-needs-in-england-january-2022)

Comprehensive work has been carried out projecting growth in Wokingham's number of EHC Plans in the coming years as part of the Safety Valve programme. These projections modelled several potential scenarios based on historical trends, benchmarking with regional and statistical neighbours and local intelligence. These Projections do factor in ONS population projections but not Local Plan modelling of increased population in specific localities.

The projections below are 'unmitigated' – that is they assume previous trends continue without additional intervention such as the new SEN Free Schools. The forecasting approach used provides confidence intervals – lower, medium, and upper – which allows for the inherent uncertainty in any modelling and provide a range of likely outcomes.

With this rate of increase and no new provision to meet needs, the financial impact on the local area would be severe and would lead to a catastrophic financial deficit in the High Needs Block of £96.6m by the end of 2028/29 with around 2,800 EHCPs. Projected growth is particularly focused on children and young people with EHCPs for ASD and SEMH, with corresponding continuing pressures on their HNB budgets.