

Title of Report:	Schools Place Strategy 2013-2018
Report to be considered by:	Executive
Date of Meeting:	May 9 2013
Forward Plan Ref:	EX2491

Purpose of Report: To outline the Council's approach to school place planning.

Recommended Action: To approve the Schools Place Strategy for consultation with stakeholders.

Reason for decision to be taken: The recommended approach provides a strategic framework for school place planning, and a robust modelling tool to support the provision of pupil number projections.

Other options considered: None

Key background documentation: Paper to Corporate Board 8/5/2012
Paper to Corporate Board 4/12/2012
Paper to Management Board 24/01/2013

<p>The proposals contained in this report will help to achieve the following Council Strategy priority:</p> <p><input checked="" type="checkbox"/> CSP3 – Improving education</p> <p>The proposals contained in this report will help to achieve the above Council Strategy priorities and principles by:</p>
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Portfolio Member Details	
Name & Telephone No.:	Councillor Irene Neill - Tel (0118) 971 2671
E-mail Address:	ineill@westberks.gov.uk
Date Portfolio Member agreed report:	24/04/2013

Contact Officer Details	
Name:	Caroline Corcoran
Job Title:	Service Manager (Access, Planning, Governance and Trading)
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Implications

Policy: The Schools Place Strategy provides a clear strategic direction for the provision of school places, against which future decisions will be considered

Financial: The School Place Strategy has implications for the capital budget. All works required to meet basic need provision are considered and prioritised within the capital budget for Education. However, an increase in basic need provision, whether for changes to existing schools or for new schools will have significant financial implications. The proposed Capital Strategy and Programme for 2013 - 2018 allows for the expected impact of basic need provision, including the potential costs of a new primary school for Newbury. However, depending on the amount of growth in pupil numbers over the next five years and the level of government funding, which is currently expected to reduce and to be inadequate for our basic need costs, it may be necessary to postpone or delete other schemes currently included in the programme in order to meet in full the budget pressures arising from basic need.

Personnel: N/A

Legal/Procurement: N/A

Property: N/A

Risk Management: The planning of school places carries the following risks:

- Impact on our ability to meet the statutory requirements for the provision of school places
- Impact on the placement of children in schools which are not near their home due to lack of places in their geographic locality (increased Home to School transport costs, poor publicity for the Council, dissatisfied resident parents).
- Increased and urgent pressure on capital budgets to cover off basic need requirements at short notice.

Equalities Impact Assessment: Appendix A

Corporate Board's Recommendation: To be completed after the Corporate Board meeting.

Is this item subject to call-in?	Yes: <input checked="" type="checkbox"/>	No: <input type="checkbox"/>
If not subject to call-in please put a cross in the appropriate box:		
The item is due to be referred to Council for final approval		<input type="checkbox"/>
Delays in implementation could have serious financial implications for the Council		<input type="checkbox"/>
Delays in implementation could compromise the Council's position		<input type="checkbox"/>
Considered or reviewed by Overview and Scrutiny Management Commission or associated Task Groups within preceding six months		<input type="checkbox"/>
Item is Urgent Key Decision		<input type="checkbox"/>
Report is to note only		<input type="checkbox"/>

Executive Summary

1. Introduction

- 1.1 A paper was brought to Corporate Board in May 2012, outlining the importance of accurate medium and long range forecasting of the demand for school places across West Berkshire.
- 1.2 As a result of the paper in May 2012, Corporate Board requested that plans were put in place to review and update the place projection model in the light of national and local contextual changes.

2. Place Projection Model

- 2.1 The applications for September 2012 exceeded not only the projected pupil numbers, but also exceeded the maximum number of places available. To achieve this increase in capacity, a number of schools have been allocated additional pupils (but without breaking class sizes legislation), and in a small number of schools, significant numbers have been allocated above the agreed Admissions Number using our exceptional circumstances powers and resulting in a capital financial impact of meeting these basic need requirements.
- 2.2 It is vitally important that projections for September 2013 and beyond are as accurate as possible and are based on a range of data sources, with transparent modelling and reporting. Council Officers have been working with EC Harris to develop a new and robust modelling tool. EC Harris has experience in this field, having worked with other LA including Bracknell Forest. The model is now ready to use and has provided initial projection data, which has been shared with schools and has been tested against the last four years actual data.

3. Schools Place Strategy

- 3.1 The Schools Place Strategy 2013-2018 summarises the position to date, and outlines the strategic principles and actions underpinning the planning of school places. The Strategy encompasses all West Berkshire schools and academies, except independent schools, as per the statutory responsibility for the provision of school places in West Berkshire, and addresses the complex balance of creating sufficient places whilst operating within tight capital constraints, without over-provision.
- 3.2 The Schools Place Strategy will be approved for consultation through the corporate cycle, with final approval at Executive in May 2013. The strategy would be published and a formal consultation would be launched in June 2013 with the public and with stakeholders such as schools and Overview and Scrutiny Management Committee.
- 3.3 Census 2011 data at a smaller than district (i.e. SOA) level will be released by the Office for National Statistics in late January 2013. Population estimates are made by the Office for National Statistics on an annual basis; however making estimates at a relatively small geographic level, based on increasingly out of date base data will mean an increasing margin of error. A tool to translate SOA data to school catchment data has been developed as an interim solution.

- 3.4 However, it is recommended that the Council should continue to try to gain access to the GP data which would form a more robust evidence base on which to ground subsequent projections moving forward.
- 3.5 Following the incorporation of the data sets and the consultation process, a subsequent paper would be brought through the corporate cycle in September 2013, outlining the outcome of the refresh and consultation and highlighting any resultant suggested changes. After consideration through the corporate cycle, the updated strategy would then be approved and published.
- 3.6 Going forwards, there would then be an annual refresh of the Strategy each Summer. Further work is being done to ensure that, by the next annual refresh in Summer 2014, the Strategy will include Early Years Place Planning.

4. Equalities Impact Assessment Outcomes

- 4.1 The new arrangements do not create any equal opportunities issues.

5. Conclusion

- 5.1 The recommended approach provides a strategic framework for school place planning, and robust modelling tools to support the provision of pupil number projections.

Executive Report

1. Introduction

- 1.1 A paper was brought to Corporate Board in May 2012, outlining the importance of accurate medium and long range forecasting of the demand for school places across West Berkshire.
- 1.2 As a result of the paper in May 2012, Corporate Board requested that plans were put in place to review and update the place projection model in the light of national and local contextual changes.

2. Place Projection Model

- 2.1 The applications for September 2012 exceeded not only the projected pupil numbers, but also exceeded the maximum number of places available. 2018 primary school places were allocated, against a previously agreed maximum capacity for West Berkshire of 1876. This represents 142 additional school places above the (previous) West Berkshire maximum capacity, and 320 places above the school place data projections.
- 2.2 To achieve this increase in capacity, a number of schools have been allocated additional pupils (but without breaking class sizes legislation), and in a small number of schools, significant numbers have been allocated above the agreed Admissions Number using our exceptional circumstances powers and resulting in a capital financial impact of meeting these basic need requirements.
- 2.3 It was clear that the current method of producing pupil place projections was not as effective as it needed to be, in terms of providing robust figures to inform school place planning and school organisation decisions.
- 2.4 At place allocation time, there is always publicity about the number of West Berkshire children who were allocated their first preference school; and how many were allocated their catchment school. These are key indicators in the Education Service Plan.
- 2.5 It is vitally important that projections for September 2013 and beyond are as accurate as possible (within a small tolerance of variation e.g. 1%) and are based on a range of data sources, with transparent modelling and reporting. To that end, the Service Manager (Access, Planning, Governance and Trading in the Education Service) and the Performance, Research and Consultation Manager (in Strategic Support) have been working with the EC Harris to develop a new and robust modelling tool.
- 2.6 EC Harris has experience in this field, having worked with other LAs including Bracknell Forest. The model has been developed. Testing has shown the data to be robust, based on historical data sets and outcomes.
- 2.7 The following tools have been developed and will support greater accuracy of forecast in due course. The tools have provided initial projection data, although the data comes with caveats and is currently subject to further checking and refinement:

- Population models/workbooks for each planning area – offering individual primary school and planning area data
- A secondary model/workbook – offering individual secondary school and overall area data.
- A population translation workbook – taking ward data and translating this, through a series of processes within the model, into individual school and planning area population data.
- % increase data model – A worksheet which identifies the % rise in population over a 10 year period based on forecast v actual data provided annually.
- GP models/workbooks for each planning area – offering individual primary school and planning area data (future proofing for the point when GP data is available)

2.8 These tools will enable West Berkshire to identify initial core data (first level forecasting) quickly, ensuring that there is time to re-assess and review to achieve greater accuracy.

2.9 A Strategic Place Planning Group has been established to engage the wider team who have input into planning (education assets, housing, early years).

2.10 Engagement with neighbouring authorities has taken place via EC Harris and all are interested in greater communication regarding planning issues.

3. Schools Place Strategy

3.1 The Schools Place Strategy 2013-2018 summarises the position to date, and outlines the principles and actions in relation to the planning of school places. The Strategy encompasses all West Berkshire schools and academies, except independent schools, as per the statutory responsibility for the provision of school places in West Berkshire, and addresses the complex balance of creating sufficient places whilst operating within tight capital limits, without over-provision. The provision of robust and accessible data is a key component which supports the principles of the Schools Place Strategy.

3.2 The Schools Place Strategy will be approved for consultation through the corporate cycle, with final approval at Executive in May 2013. The strategy would be published and a formal consultation would be launched in June 2013 with the public and with stakeholders such as schools and Overview and Scrutiny Management Committee.

3.3 Population estimates are made by the Office for National Statistics on an annual basis, however making estimates at a relatively small geographic level, based on increasingly out of date base data will mean an increasing margin of error (the ONS only release SOA population estimates as 'experimental statistics' and as such, do not suggest a large degree of weight in placed on them).

3.4 The census 2011 data at a localised (SOA) level is being released by the Office for National Statistics at the end of January 2013. Short of GP data, this is the closest thing to a 'count' that the Council will have - although is only relevant to a particular point in time (now 2 years ago). There is no annual refresh of this data, and any further information would be based on population estimates. A tool to translate SOA data to school catchment data has been developed as an interim solution.

- 3.5 For more accurate forecasting, it will be necessary to continue to seek to acquire additional 0-4 data from which to enable comparison of forecasts. **It is strongly recommended that the Council continue its efforts to engage with the PCT and try to gain access to GP data.** This could be used as part of the refresh of the strategy.
- 3.6 Following the incorporation of the data sets and the consultation process, a subsequent paper would be brought through the corporate cycle in September 2013, outlining the outcome of the refresh and consultation and highlighting any resultant suggested changes. After consideration through the corporate cycle, the updated strategy would then be approved and published.
- 3.7 Going forwards, there would then be an annual refresh of the Strategy each Summer. Further work is being done to ensure that, by the next annual refresh in Summer 2014, the Strategy will include Early Years Place Planning.

4. Conclusion

- 4.1 The recommended approach provides a strategic framework for school place planning, and a robust modelling tool to support the provision of pupil number projections.

5. Recommended Action

- 5.1 To approve the Schools Place Strategy for consultation with stakeholders.

Appendices

Appendix A – Equality Impact Assessment – Stage 1
Appendix B – Schools Place Strategy 2013-2018

Consultees

Local Stakeholders: *

Officers Consulted: Ian Pearson, Mark Lewis, Jason Teal, Gabrielle Esplin

Trade Union: *

Equality Impact Assessment – Stage One

Name of item being assessed:	Schools Place Strategy
Version and release date of item (if applicable):	
Owner of item being assessed:	Caroline Corcoran
Name of assessor:	Caroline Corcoran
Date of assessment:	23/04/2013

1. What are the main aims of the item?
To agree a strategic framework for the planning of school places

2. Note which groups may be affected by the item, consider how they may be affected and what sources of information have been used to determine this. (Please demonstrate consideration of all strands – age; disability; gender reassignment; marriage and civil partnership; pregnancy and maternity; race; religion or belief; sex; sexual orientation)

Group Affected	What might be the effect?	Information to support this.
Pupils	<p>Pupils may not be able to get a place at the school of their choice.</p> <p>Pupils may have to travel further to the school that they are allocated.</p> <p>Pupils may not be able to get into the same school as their sibling(s) or friends,</p>	<p>Popular schools may be full.</p> <p>Waiting lists for places.</p>
Parents	<p>Parental preference varies from year to year and parents expect the Council to ensure there are sufficient places in popular schools, even though popularity changes constantly</p> <p>Parents may find that they have children in different schools, and this can impact on their ability to drop off and collect children in two places at the same time.</p>	<p>Complaints, feedback and admission appeals</p>

Further comments relating to the item:

There is an expectation that the Council will accommodate parental preference and that a high percentage of pupils will get their choice of school. The figures are reported in the press each year.

3. Result (please tick by clicking on relevant box)	
<input type="checkbox"/>	High Relevance - This needs to undergo a Stage 2 Equality Impact Assessment
<input type="checkbox"/>	Medium Relevance - This needs to undergo a Stage 2 Equality Impact Assessment
<input type="checkbox"/>	Low Relevance - This needs to undergo a Stage 2 Equality Impact Assessment
<input checked="" type="checkbox"/>	No Relevance - This does not need to undergo a Stage 2 Equality Impact Assessment

For items requiring a Stage 2 equality impact assessment, begin the planning of this now, referring to the equality impact assessment guidance and Stage 2 template.

4. Identify next steps as appropriate:	
Stage Two required	
Owner of Stage Two assessment:	
Timescale for Stage Two assessment:	
Stage Two not required:	

Name: Caroline Corcoran

Date: 23/04/2013