

## **Education Planning Obligations Assessment**

Worcestershire Children's Services have assessed the impact of this proposed development on local schools and wish to seek a planning obligation for education infrastructure. The assessment has been prepared in line with the Education Planning Obligations Policy.

The schools which have been identified as related to the development are listed below. We have considered a number of criteria by which the impact of the development and the ability of schools at each phase of education to manage it can be assessed.

Worcestershire has six district councils, each with a policy enabling the collection of developer contributions. To date, the South Worcestershire Councils are the only councils in Worcestershire to have adopted a Community Infrastructure Levy (CIL) charging schedule<sup>1</sup>. For more information regarding CIL and the tests in which CIL is applicable, please see appendix at the end of this assessment.

This assessment has been carried out and is accurate as at 16/07/2024.

In response to the planning application, an assessment will be carried out to understand if a contribution is required towards Early Years/Primary/Secondary phases of education, along with SEND<sup>2</sup>. This is calculated in line with the Worcestershire County Council [Policy](#)<sup>3</sup> on S106 Education Contributions. Certain types of dwellings that are likely to be present on this development are excluded from the requirement for an education contribution, notably 1-bedroom dwellings, affordable rent and social rent properties, although properties categorised as 'intermediate rent' are still liable. These types of properties will be discounted from the contribution at reserved matters phase.

Any social affordable rent dwellings are exempt from a contribution and therefore once the housing mix is confirmed at reserved matters stage, the below figures can be revised. However, should there be a proportion of intermediate housing included within the Social/Affordable housing then this would need to be included and the below amounts are subject to change.

## **About the development**

**Planning Application:** 21/01830/FUL

**Location:** Land West of Hither Green Lane, Redditch, Worcestershire

**Details:** Residential development (Class C3) with a vehicular access point onto Hither Green Lane, play areas, public open space including footways and cycleways, sustainable urban drainage systems and all other ancillary and enabling infrastructure

**District/EPA:** Bromsgrove/Redditch

**Number of Dwellings:** 216

### **Other Agreed Applications Within Area of Development:**

Within the area of Bromsgrove and Redditch, there are several major developments that have been approved by the district planning authorities that will have an effect on the number of places available at the catchment and related schools mentioned within this assessment. The major developments at Foxlydiate, Redditch and Perryfields/Whitford Road, Bromsgrove have mitigated Primary places created by their developments by including the building of Primary schools, however, still yield a large number of Middle and High school aged pupils.

Below is a table of the forecasted pupil yield from sites that have already been approved through the district planning authorities that will affect the named schools above over the next 5 years, reducing the number of places available for families inhabiting the proposed development.

---

<sup>1</sup> Education Planning Obligations Policy Worcestershire, 2.2, pg 4.

<sup>2</sup> Special Educational Needs and Disability

<sup>3</sup> [Education Planning Obligations Policy \(worcestershires.gov.uk\)](https://www.worcestershire.gov.uk/education-planning-obligations-policy)

Planning Ref	Location	Number of Dwellings	Early Years Yield (Full Time Equivalent)	First Phase Yield (Per Year Group)	Middle School Yield (Per Year Group)	High School Yield (Per Year Group)	Phases Affected Within This Assessment
16/1132/OUT	Land at Whitford Road	490	54	24	22	20	North/South Bromsgrove High
16/0335/OUT	Perryfields Road, Bromsgrove	1,300	143	64	57	51	North/South Bromsgrove High
21/01046/FUL	Land to North of Perryfields Road	60	7	3	3	3	North/South Bromsgrove High
<b>Totals</b>		<b>4,493</b>	<b>508</b>	<b>227</b>	<b>203</b>	<b>182</b>	
<b>Mitigation for these developments</b>	<b>1 X 2FE First at Foxlydiate 1 X 2FE First at Perryfields</b>		<b>104 place Nursery 600 First School Places (120 per year group)</b>				
<b>Totals (Minus Mitigated provision)</b>			<b>404</b>	<b>107</b>	<b>203</b>	<b>182</b>	

Worcestershire Children First incorporates a 5% surplus when assessing the impact of developments within Worcestershire. This is to allow for internal migration of students throughout the course of the academic year, and to allow for families moving into Worcestershire needing school places for children. Surplus is looked at over the area of the development with a surplus of 5% needed within each school, and a combined 5% surplus across 2-mile walking radius from the development for children below eight years of age and a 3-mile walking radius for children aged eight years and older.

## **Assessment of Impact**

A development of this type is likely to attract young families that will have an impact on related schools and early years providers. The development is located in the education planning area of Bromsgrove yet sits within the district of Redditch. The catchment schools for this development are Beoley First, Alvechurch CofE Middle and shared North and South Bromsgrove High.

Related schools are the catchment schools for the location of the development, schools that are located within a two-mile safe walking route that offer education for children who are eight years or younger, schools that are located within a three-mile safe walking route that offer education for children who are nine years or older, and schools that can demonstrate a likely demand from families moving into the area<sup>4</sup>. There are no related schools to this development due to a lack of safe walking routes.

The total number of proposed dwellings on site will be 216, with the exception of 2 x 1-bed dwellings, as these do not yield children. Therefore, 214 dwellings is the number the assessment will be based on.

<sup>4</sup> Based on DFE Guidance on home to school travel and transport (July 2014)

## Pupil Yield

The mainstream Pupil Product Ratio (PPR) is based on evidence from recent housing developments, matching school census data and known children numbers to housing developments to determine average pupil numbers, and characteristics over time<sup>5</sup>.

The SEND PPR is based on the average percentage of pupils in Worcestershire requiring specialist education provision. This is based on the average percentage of pupils in Worcestershire with an Education Healthcare plan over the last 5 years, which is 3%<sup>6</sup>.

Bromsgrove/Redditch Mainstream - 3 tier	Early Years	First	Middle	High and 6th Form	SEND Primary	SEND Secondary
<b>Total FTE places</b>	24	52	38	34	2	2
<b>Per Year Group</b>	N/A	11	10	9	N/A	N/A

## Early Years

The Local Authority has a statutory duty to secure, as far as is reasonably possible, sufficient places for children aged 2, 3 and 4 to claim their entitlement to funded nursery education. In addition, the Local Authority should secure sufficient childcare for working parents.

Early Years settings comprise a mix of providers including school-based nurseries, playgroups, private nurseries and childminders, and families have the right to obtain their funded hours entitlement at any early years setting across the county; therefore, the market is based entirely on parental choice with very little input from Worcestershire Children First in the distribution of children across settings. Instead of using Education Planning Areas as in mainstream education, wards are used as the smallest divisible segments of the county in which Early Years provision can be analysed. This approach is consistent with that used by other Local Authorities across the country.

The proposed development is located within the ward of Abbey and forecast to yield 24 children who may need childcare places at an early-years setting. Updated sufficiency figures for 2022 show there is a **sufficient** level of funded childcare places in three wards close to this development. Therefore, a contribution towards early years provision **will not** be sought.

## First School

Number on Roll by Year Group (October 2023 school census)

School	Reception	Year 1	Year 2	Year 3	Year 4	TOTAL
<b>Beoley First*</b>	20	20	20	19	18	<b>97</b>
<b>Spare places per year group</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>

\*Catchment Schools

<sup>5</sup> Education Planning Obligations Policy Worcestershire, 5.6, pg 11.

<sup>6</sup> Education Planning Obligations Policy Worcestershire, 5.7, pg 11

Other relevant information

School	School Capacity	Published Admission Number (Sept 2024)	PAN of largest year group minus NOR in that year group	Number of year groups	Average spare places per year group
<b>Beoley First*</b>	100	20	0	5	<1

\*Catchment Schools

Forecast Information

Year of admission to Reception

School	Sept 2024	Sept 2025	Sept 2026	Sept 2027
<b>Beoley First*</b>	20	20	18	13
<b>Forecasted places per year group</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>7</b>

\* Catchment School

The forecast for the catchment First school shows there will not be enough space for the anticipated pupil yield for this development. Therefore, a contribution towards First school provision will be required.

There is no safe walking route from the catchment First school, therefore a contribution from the Transport team may also be required.

First School Contribution Required: £993,859

**(N\* X 0.05 X 5) (rounded up to a whole number) x £23,113**

**172 X 0.05 X 5 = 43 = 43 X £23,113 = £993,859**

to be used for the provision of additional education facilities at Beoley First School or any such school serving the area of the development

\*N = The gross number of dwellings on the development **excluding** Social Rent and Affordable Rent housing [42], and 1-bed dwellings [2]. Please note, Intermediate Rent, Rent to Buy, Affordable Housing and Self-Build housing **are inclusive**.

## Middle School

Number on Roll by Year Group (October 2023 school census)

School	Year 5	Year 6	Year 7	Year 8	TOTAL
<b>Alvechurch Middle*</b>	110	111	110	109	<b>440</b>
<b>Total spare places per year group</b>	<b>0</b>	<b>-1</b>	<b>0</b>	<b>1</b>	<b>0</b>

\* Catchment Schools

Other relevant information

School	School Capacity	Published Admission Number (Sept 2024)	PAN of largest year group minus NOR in that year group	Number of year groups	Average spare places per year group
<b>Alvechurch Middle*</b>	440	110	0	4	0

\*Catchment Schools

## Forecast Information

Year of admission to Year 5

School	Sept 2024	Sept 2025	Sept 2026	Sept 2027
Alvechurch Middle*	114	111	114	113
<b>Forecasted Spare Places per Year Group</b>	<b>-4</b>	<b>-1</b>	<b>-4</b>	<b>-3</b>

\* Catchment Schools

It is forecast that there will not be enough space within the catchment Middle school to accommodate the pupil yield from this development. Therefore, a contribution towards the Middle phase **will** be required.

There is no safe walking route to the catchment Middle, therefore a contribution from the Transport team may be required.

Middle School Contribution Required - £837,981

(4 year groups split across first (2) and high (2))

**Step 1. (N X 0.05 X [number of year groups] X 0.97) (rounded up to a whole number) x £23,113**

**Step 2. (N X 0.04 X [number of year groups] X 0.97) (rounded up to a whole number) x £31,790**

**Step 3. Step 1 + Step 2 = Total Middle Contribution**

**172 X 0.05 X 2 X 0.97 = 16.6 = 17 X £23,113 = £392,921**

**172 X 0.04 X 2 X 0.97 = 13.3 = 14 X £31,790 = £445,060**

**£392,921 + £445,060 = £837,981**

to be used for the provision of additional education facilities at Alvechurch Middle School or any such school serving the area of the development

## High School and Sixth Form

Number on Roll by Year Group (October 2023 school census)

School	Year 9	Year 10	Year 11	Year 12	Year 13	Total Excl 6 <sup>th</sup> Form
North Bromsgrove High*	320	268	266	90	107	854
South Bromsgrove High*	335	332	328	182	177	995
<b>Total</b>	<b>655</b>	<b>600</b>	<b>594</b>	<b>N/A</b>	<b>N/A</b>	<b>1,848</b>
<b>Spare places per year group</b>	<b>-20</b>	<b>35</b>	<b>41</b>	<b>N/A</b>	<b>N/A</b>	<b>57</b>

Other relevant information

School	School Capacity Excl 6 <sup>th</sup> Form	Published Admission Number (Sept 2024)	PAN of largest year group minus NOR in that year group	Number of year groups Excl 6 <sup>th</sup> Form	Average spare places per year group Excl 6 <sup>th</sup> Form
North Bromsgrove High*	900	300	0	3	15-16
South Bromsgrove High*	1,005	335	0	3	3-4
<b>Total</b>	<b>1,905</b>	<b>635</b>	<b>N/A</b>	<b>N/A</b>	

## Forecast Information

Year of admission to Year 9

School	Sept 2024	Sept 2025	Sept 2026	Sept 2027
North Bromsgrove High*	293	323	298	290
South Bromsgrove High*	335	358	349	326
Total	628	681	647	616
Additional Pupil Yield from Approved Housing	74	74	74	74
Total	702	755	721	690
Forecasted spare places per year group	-67	-120	-86	-55

The two catchment High Schools are forecast to not have enough capacity to take on the additional 9 pupils per year group expected from this development. Therefore, a contribution towards the High phase **will be** required.

The catchment High schools are over the statutory 3-mile walking distance and do not have a safe walking route, a contribution from Transport may be required.

High Phase Contribution - £858,330

**(N X 0.04 X [number of year groups] X 0.97) (rounded up to a whole number) x £31,790**

**172 X 0.04 X 4 X 0.97 = 26.69 = 27 X £31,790 = £858,330**

to be used for the provision of additional education facilities at North Bromsgrove High School or South Bromsgrove High School or any such school serving the area of the development

## **Specialist SEND Provision**

An assessment will also be carried out regarding any SEND (Special Educational Needs and Disabilities) contribution required. Section 315 of the Education Act 1996 requires that arrangements for children with SEND be kept under review.

As explained within our Policy, where the impact of a development on educational infrastructure is such that it can be shown that there will be a requirement for additional provision for children with SEND, either within existing mainstream or specialist schools, or in the creation of a new school, a contribution for special needs and disability provision will be sought.

This is based on the average percentage of pupils in Worcestershire with an Education Healthcare plan over the last 5 years, which is 3%.

Any requirements for a contribution through S106 or CIL will be assessed and calculated on a case-by-case basis. A contribution directly required for SEND provision will not be sought on any developments of less than 50 dwellings<sup>7</sup>.

**SEND Contribution - £531,676**

**Step 1. (Primary Contribution) (N X 0.05 X 7 X 0.03) (rounded to the nearest whole number) x £23,113 X 4**

**Step 2. (Secondary Contribution) (N X 0.04 X 6 X 0.03) (rounded to the nearest whole number) x £31,790 X 4**

**Step 3. Step 1 + Step 2 = Total SEND Contribution**

**214 X 0.05 X 7 X 0.03 = 2.24 = 3 X £23,113 = £69,339 X 4 = £277,356**

**214 X 0.04 X 6 X 0.03 = 1.54 = 2 X £31,790 = £63,580 X 4 = £254,320**

---

<sup>7</sup> Education Planning Obligations Policy Worcestershire, 6.7, pg14

This contribution will be used to support education projects at SEND facilities either within mainstream schools or at stand-alone SEND settings within Worcestershire.

## **Total Contributions Required**

Early Years	£0
First Phase	£993,859
Middle Phase	£837,981
High Phase	£858,330
SEND	£531,676
<b>TOTAL CONTRIBUTION</b>	<b>£3,221,846</b>

The contribution rate is applicable from 1st April 2024 to 31st March 2025. If a planning decision is not reached within the current financial year it may be necessary to review the level of charges.

Financial contributions will be subject to indexation and interest on overdue payments. The calculation of indexation and interest will be set out in the legal agreement.

Contribution to be paid on or before occupation of one third of dwellings, unless agreed otherwise.

## **Conclusion**

We do not object to this application subject to a requirement for an education contribution as detailed in this assessment.

## **Contact Information**

For further information please contact

Education Sufficiency & Place Planning team

[spp@worcestershire.gov.uk](mailto:spp@worcestershire.gov.uk)

# **Appendix**

## **CIL test compliance**

Paragraph 57 and regulation 122 of the CIL Regulations 2010 set three tests for any planning obligation. The obligation must be:

### 1) Necessary to make the development acceptable in planning terms

All types of housing development will create additional households in the community in which they are situated. Except for developments aimed at specific sub-sections of the population, such as retirement apartments and one bed dwellings, these new households are likely to include children at some stage in the lifespan of the property. This increase in the child population will create additional demands on schools in the local area.

The mainstream Pupil Product Ratio (PPR) is based on evidence from recent housing developments, matching school census data and known children numbers to housing developments to determine average pupil numbers and characteristics over time. In Worcestershire this equates to an average of 0.11 FTE funded places for children aged 2-4 per dwelling, 0.05 children per dwelling per year group in the primary phase of education (Year R - Year 6), and an average of 0.04 children per dwelling per year group in the secondary phase of education (Year 7 - Year 13).

Additionally, all new developments are assessed for the impact on SEND provision. The SEND PPR is based on the average percentage of pupils in Worcestershire requiring specialist education provision. This is based on the average percentage of pupils in Worcestershire with an Education Healthcare plan over the last 5 years, which is 3%. This percentage is significantly lower for children under the age of 5, therefore SEND provision will not be sought for early education places. Contributions for SEND places will not be sought on developments of fewer than 50 dwellings.

### 2) Directly related to the development

The County Council has identified the schools and providers directly related to this development where they operate a catchment area as part of their admission criteria which covers the area in which the development is situated or where there are in close proximity to the development and can demonstrate a likely demand from families moving on to the development.

### 3) Fairly and reasonably related in scale and kind to the development

Education planning obligations will either be in the form of a financial contribution or as an in-kind payment by way of provision of land and/or school buildings. The level of contribution sought is determined by reference to a cost per pupil place, assessed on the size and type of dwellings proposed. One-bedroom dwellings and specialist accommodation are exempted in recognition of their low pupil yield. Affordable housing that is specifically for the rental market and classified as affordable or social rent will be exempt however, all other dwellings will be chargeable.

## **Monitoring Fees**

When planning obligations for education infrastructure are included in a legal agreement, WCC will seek monitoring fees towards the monitoring of such obligations. The fees are based on a) the actual work undertaken to administer and ensure compliance with the agreement and b) the development size. For more information, please see the document on WCC website [Section 106 monitoring fees](#).