



# Education Contribution Assessment

**Pickerings Farm Site 07/2021/00886/ORM**

*South Ribble Borough Council*

17/09/2021

## **Education Assessment 17<sup>th</sup> September 2021**

Lancashire County Council is responsible for the provision of school places across the 12 county districts. The county has been facing significant increases in the birth rate at the same time as capital funding from the Department for Education has been significantly reduced.

In accordance with Lancashire County Council's 'School Place Provision Strategy', the following will apply:

Where the growth in pupil numbers is directly linked to housing development and existing school places are not sufficient to accommodate the potential additional pupils that the development may yield, Lancashire County Council would seek to secure developer contributions towards additional school places. Only by securing such contributions (which, depending upon the scale of development, may also include a contribution of a school site), can Lancashire County Council mitigate against the impact upon the education infrastructure which the development may have.

This assessment shows the level of impact on primary and secondary school places relevant to the following development and provides details on the level of contribution required to mitigate the development impact:

### **Pickerings Farm Site**

#### **Pupil Yield**

Through a detailed research project carried out during 2012 LCC have established a pupil yield to be applied for the bedroom mix within a development.

Using the Rightmove database (based on Land Registry information), a cross matching exercise was undertaken to match the first occupation of a house with the relevant School Census. The research enabled LCC to ascertain the likely impact of a dwelling with 1, 2, 3, 4, or 5+ bedrooms in terms of the child yield. This enabled LCC to project the pupil yield of new houses, based on the number of bedrooms per dwelling.

LCC will seek to apply these pupil yields to our assessment, however, if bedroom information has not been provided by the developer LCC will apply the 4 bedroom yield, to provide a medium to worst case scenario. Once bedroom information is available the impact of this development will be reassessed using the yield information provided in the 'Development details' section below.

### Local primary schools within 2 miles of development

When assessing the need for an education contribution from this development Lancashire County Council considers primary school provision within a 2 mile radius of the proposed site. Details of the schools relevant to this site are provided below:

School Name	Latest Number on Roll *	Future Planned Net Capacity (Jan 2026) **	Projected Pupils by Jan 2026 ***
Kingsfold Primary School	119	180	78
Penwortham Broad Oak Primary School	187	210	190
Farington Moss St Paul's Church of England Primary School	190	198	193
Penwortham Middleforth Church of England Primary School	204	204	195
Cop Lane Church of England Primary School. Penwortham	206	210	191
Our Lady and St Gerard's RC Primary School. Lostock Hall	312	378	306
St Mary Magdalen's Catholic Primary School	211	210	194
New Longton All Saints' Church of England Primary School	211	210	197
Lostock Hall Community Primary School	403	420	388
Whitefield Primary School	397	420	366
Howick Church of England Primary School	100	105	91
Preston St Stephen's Church of England Primary School	276	315	291
Penwortham Primary School	204	210	186
St Teresa's Catholic Primary School. Penwortham	276	295	261
Walton-le-Dale Primary School	402	420	382
<b>Total</b>	<b>3698</b>	<b>3985</b>	<b>3509</b>

\* Latest Number on Roll (NOR) reflects the most up-to-date pupil numbers at the school. Assessments between 1st December and 31st March will use October NOR, assessments between 1st April and 30th November will use January NOR.

*\*\* The net capacity figure is agreed via consultation with the schools, during September each year. The future net capacity includes any agreed capacity changes, which LCC have been informed about.*

*\*\*\* Based on the latest projections at the time of the assessment. Please note that the figures provided are based upon current circumstances and this position is subject to change in response to a number of factors that can affect parental preference. The figures take into account the latest available birth information, evidence of migration and also the projected pupil place demand in 5 years.*

*\*\*\*\*Please note, these forecasted figures will not be the capacity of the school in the forecasted year, they are an apportionment of the projected overall figures.*

Projected places in 5 years: 476

Additional information which may provide context to the figures above has been included in the table below. This table provides year by year pupil projections for the schools affected by the development.

JAN 2022	JAN 2023	JAN 2024	JAN 2025	JAN 2026
3680	3636	3562	3476	3401

The figures above show the forecast number on roll before housing and migration is applied. Using the appropriate district's 5 year Housing Land Supply documents (or equivalent) and migration figures in 5 years' time we forecast there will be **3509** pupils in these schools.

## Development details

Number of bedrooms	Yield applied per dwelling	Number of dwellings	Primary yield for this development
1	0.01		
2	0.07		
3	0.16		
4	0.38	920	349.6
5	0.44		
<b>Totals</b>		<b>920</b>	<b>(349.6) 350 Places</b>

## Education requirement

Latest projections for the local primary schools show there to be 476 places available in 5 years' time. These projections take into account the current numbers of pupils in the schools, the expected take up of pupils in future years based on the local births, the expected levels of inward and outward migration based upon what is already occurring in the schools and the housing development within the local 5 year Housing Land Supply document, which already have planning permission.

### **Other developments approved, pending approval or appeal decision which will impact upon these primary schools:**

In addition to those developments listed in the housing land supply document, a number of planning applications have already been approved in this area and these have an effect upon the places available.

These developments are:

- Land South of Hampshire Road 07/2021/00532
- St Marks Building, 70 Wellfield Road 06/2021/0168
- Bhailok Court 06/2020/1150
- 38-42 Guildhall Street 06/2020/0949
- Land Bound by Ainsdale Road 06/2020/0746
- Land off Croston Road (Moss Lane/Heatherleigh NE) 07/2020/00552/FUL
- Land Off Carrwood Road 07/2020/00440/FUL
- McKenzie Arms 07/2020/00396/FUL
- Land Between Lyme Road and The Cawsey Penwortham 07/2020/00365/FUL
- Ashton Basin 06/2019/1101
- St Joseph's Orphanage 06/2019/0952
- Car Park, Avenham Street 06/2019/0856
- 217 Garstang Road 06/2019/0635
- 7 Marsh Lane 07/2019/1810/FUL
- Brook House Hotel 19/00075/FULMAJ (VAR -  
20/01360/FULMAJ)
- 46 - 56 Guildhall Street 06/2018/0142
- Canterbury Hall 06/2018/0036
- Former Ramblers Club 06/2021/0425
- Preston Golf Club 06/2020/0119
- Land East of Deafway 06/2019/0986

- Land North of Eastway 06/2019/1037
- Bartle Meadows 06/2018/1414
- Rear of Greenside 19/00361/FULMAJ
- Land 10M South Of 21 Dunrobin Drive 18/01211/FULMAJ
- Lucas Green 18/00367/OUTMAJ
- Land off Langdale Road 07/2018/0334/OUT
- Land at D'urton Lane - North of M55 06/2018/1230
- Haydock Grange 06/2017/1385

Collectively these developments are expected to generate demand for 26 additional places.

There are a number of additional housing developments which will impact upon this group of schools which are pending a decision or are pending appeal. Should a decision be made on any of these developments (including the outcome of any appeal) before agreement is sealed on this contribution, our position may need to be reassessed, taking into account the likely impact of such decisions.

These developments are:

- Pickerings Farm 07/2021/00887
- 83, Former Lamb Hotel 06/2021/1001
- Land at Belle Field Close 07/2021/00665/FUL
- 113-115 Market West Street 06/2021/0769
- Former Perry's Motor Village 06/2021/0116
- Former Vernon Carus Ltd Land at Penwortham Mills Factory Lane 07/2020/01034/ORM
- Land To The East Of Reynard Close 07/2020/01063/FUL
- Sumpter Horse Pub 07/2020/01035/FUL
- Land off Tom Benson Way 06/2020/0652
- Land at Cottage Gardens 07/2020/00443/FUL
- Emmanuel Church 06/2020/0386
- Foresters Hall 06/2018/0072
- Land to the North of D'urton Lane 06/2021/1119
- Land North Of Town Lane 20/01347/OUTMAJ
- Land East of Tincklers Lane 20/01331/OUTMAJ
- Former BAE Site Group 1 Parcel 20/01141/FULMAJ
- Head O'th Marsh Farm 20/01114/FULMAJ
- Land to the North of Hoyles Lane & East at Sidgreaves Lane 06/2018/0705

Collectively these developments are expected to generate demand for 108 additional places.

### Effect on number of places

The calculation below details the effect on pupil places,

	3985	Net Cap
-	<u>3509</u>	Forecast
	476	Projected places available in 5 years
-	<u>26</u>	Yield from approved applications
	450	Places available in 5 years
-	<u>350</u>	Yield from this development
	100	Places available in 5 years
-	<u>108</u>	Yield from pending applications
	-8	Places available in 5 years

There are a number of applications that are pending a decision which have an impact on the pupil places available. Collectively these applications could yield a total of 108 places. Should these applications be approved prior to a decision being made on this application it would result in a shortfall of 8 school places.

### Education Requirement

Based on current approvals a primary education contribution is not required. However, please note that if any of the pending applications listed above are approved prior to a decision being made on this development the claim for primary school provision could increase up to maximum of 8 places.

## Local Secondary schools within 3 miles of the development

When assessing the need for an education contribution from this development Lancashire County Council considers secondary school provision within a 3 mile radius of the proposed site. Details of the schools relevant to this site are provided below:

School Name	Latest Number on Roll *	Future Planned Net Capacity (Jan 2026) **	Projected Pupils by Jan 2026 ***
All Hallows Catholic High School. Penwortham	902	915	894
Lostock Hall Academy	657	738	709
Penwortham Girls' High School	776	775	772
Penwortham Priory Academy	760	1152	787
Hutton Church of England Grammar School	736	825	737
Christ the King Catholic High School	371	616	453
St Mary's RC High School & Sports College, Brownedge	746	800	735
Wellfield Business and Enterprise College	326	830	298
Academy@Worden	536	590	554
Eden Boy's School	603	620	657
Walton-le-Dale High School	771	785	772
St Mary's Catholic High School, Leyland	763	890	809
Preston Muslim Girls' High School	540	567	598
<b>Total</b>	<b>8487</b>	<b>10103</b>	<b>8775</b>

\* Latest Number on Roll (NOR) reflects the most up-to-date pupil numbers at the school. Assessments between 1st December and 31st March will use October NOR, assessments between 1st April and 30th November will use January NOR.

\*\* The net capacity figure is agreed via consultation with the schools, during September each year. The future net capacity includes any agreed capacity changes, which LCC have been informed about.

\*\*\* Based on the latest projections at the time of the assessment Please note that the figures provided are based upon current circumstances and this position is subject to change in response to a number of factors that can affect parental preference. The figures take into account the latest available birth information, evidence of migration and planned housing development, to provide a 5 year projection.

\*\*\*\*Please note, these forecasted figures will not be the capacity of the school in the forecasted year, they are an apportionment of the projected overall figures.

Projected places in 5 years: 1328



Additional information which may provide context to the figures above has been included in the table below. This table provides year by year pupil projections for the schools affected by the development.

JAN 2022	JAN 2023	JAN 2024	JAN 2025	JAN 2026
8590	8709	8795	8800	8728

The figures above show the forecast number on roll before housing and migration is applied. Using the appropriate districts 5 year Housing Land Supply documents (or equivalent) and migration figures in 5 years' time we forecast there will be **8775** pupils in these schools.

### Development details

Number of bedrooms	Yield applied per dwelling	Number of dwellings	Secondary yield for this development
1	0.00		
2	0.03		
3	0.09		
4	0.15	920	138
5	0.23		
<b>Totals</b>		<b>920</b>	<b>(138.0) 138 Places</b>

### Education Requirement

The calculation below details the effect on pupil places,

10103	Net Cap
- 8775	Forecast
1328	Projected places available in 5 years
- 36	Yield from approved applications
1292	Places available in 5 years
- 138	Yield from this development
1154	Places available in 5 years
- 90	Yield from pending applications
1064	Places available in 5 years

Latest projections for the local secondary schools show there to be 1328 places available in 5 years' time, with additional planning approvals expected to generate a demand for a further 36 school places. There are also pending applications expected to generate demand for a further 90 school places. With an expected pupil yield of 138 pupils from this development, we would not be seeking a contribution from the developer in respect of secondary places.

## Summary and Calculations

This assessment represents the current position on 17/09/2021 but will be adjusted by indexation at the point of payment.

The latest information available at this time was based upon the latest School Census available and resulting projections.

Based upon the latest assessment, taking into account all approved applications, LCC will not be seeking a contribution for primary school places or secondary school places.

However, as there are a number of applications that are pending a decision that could impact on this development should they be approved prior to a decision being made on this development the claim for primary school provision could increase up to maximum of 8 places.

Calculated at the current rates, this would result in a maximum primary claim of:

### **New build**

Primary places:

(£20,508 x 0.97)

= £19,892.76 per place

£19,892.76 x 8 places = **£159,142.08**

*LCC reserve the right to reassess the education requirements taking into account the latest information available.*

### **Named Infrastructure Project**

The final position assessment of the impact of the development on school places including infrastructure details should be provided as part of your development control committee process. The infrastructure project(s) where the secured education contribution will be spent to deliver additional school places will be determined at the point at which the application is considered for decision. The local planning authority will need to notify the School Planning Team of the final decision date to enable the final position, including the school infrastructure project, to be provided.

In this instance, it is likely that the primary places required to mitigate the strategic development will be provided at the proposed new primary school site on the strategic development. It is therefore necessary to apply the 'New Build Cost Per Place' in line with LCC's Education Contribution Methodology and DfE guidance.

To take into account potential changing circumstances, should the places be provided through school expansion the cost per place would be revised to the 'Permanent Expansion' cost per place.

## School Site

We understand that further discussion with LCC's Capital Programme Team is required on the proposed school site.

As part of the wider Masterplan area and future development noted in the Masterplan documentation, a 2FE primary school site is sought. We welcome the inclusion of the school site in this application. This is required to ensure both applications currently submitted are sustainable. Although the pupil places requirements of both applications are low there is the need for the school site to be safeguarded to address further demand referred to in the Masterplan documentation submitted with this application.

We acknowledge that the school site is expected to be provided in kind to be offset against the CIL payments and the contributions expected to be funded through a Section 106 planning obligation.

May I take this opportunity to remind you of the DfE 'Securing Developer Contributions for Education' guidance that states that there should be an initial assumption that both land and funding for construction will be provided for new schools planned within housing developments, with the land provided on a peppercorn basis.

In addition, it is expected that all sites for provision of new schools shall meet the following criteria:

<b>Location</b>	<p>Located to serve the proposed housing development</p> <p>Not located close to other schools of the same nature</p> <p>Not adjacent to major roads, or other facilities that would cause excessive noise and/or pollution</p> <p>Must not be within a 60-meter buffer zone of overhead power lines.</p>
<b>Site size</b>	<p>Total site area to be in accordance with Building Bulletin 103 Annex B. The site size calculation shall be made using the proposed pupil numbers and the maximum total site area formula until such time as a full feasibility study has been undertaken.</p>
<b>Access</b>	<p>Must have safe walking/cycling routes from the surrounding housing and be within reasonable walking/cycling distance</p> <p>Must have suitable road access and allow for pupil drop off without disruption to the road network. Road access should not be from single access estate roads, a through route is more suitable.</p> <p>Vehicular access to the school site should not be on a bend or other position likely to cause congestion or road safety issues.</p> <p>Ideally served by public transport.</p>
<b>Proximity to other facilities</b>	<p>Close to other community facilities such as shops, community centre or public open space.</p>
<b>Topography</b>	<p>Reasonable flat sites are preferred, with no major level changes.</p>
<b>Landscape features</b>	<p>No ponds / ditches / protected hedges crossing the site, but access to landscape features e.g. wooded area desirable</p>

	No public rights of way across the site.
<b>Ground conditions</b>	<p>Not a site previously used for mineral extraction or industry</p> <p>Free from contamination (other than any naturally occurring in a "greenfield" scenario, and including any groundwater)</p> <p>Not boggy ground or ground traversed by culverts or drainage ditches</p> <p>No geological fault lines</p> <p>No adverse conditions preventing a normal strip foundation solution and capable of achieving an overall 5% CBR ground bearing capacity rating at 100 kN/m<sup>2</sup> under any proposed building footprint and car parking area;</p>
<b>Shape</b>	Able to support a sensible layout of parking, school buildings and play areas including sports pitches to recommended areas and dimensions.
<b>Services available</b>	Must have access to all mains services e.g. water, drainage, gas and electrical and broadband.
<b>Flooding</b>	Not within flood zone 2 or 3. Not subject to ground water flooding.
<b>Heritage assets</b>	No known archaeological or heritage assets within the site.

In addition, any transfer of the School Land to the County Council shall:

- ensure that the School Land shall be transferred to the County Council in a developable state with nil "abnormal costs" associated with it upon the date of transfer, (or within an agreed programme date of handover):
  - with highways (roads, footways & cycle ways) and service ducts constructed to an adoptable standard up to the boundary of the site;
  - without other development constraints relating to: archaeology, ecology (protected species), tree preservation orders or restrictive covenants – including any existing or proposed third party rights or interests being granted in the land (such as, but not limited to: access rights, service easements/wayleaves – excepting the incoming services solely to serve the transferred land, rights of support for neighbouring land, etc.).

**Please Note**

- **As this assessment has a number of pending applications impacting upon it a recalculation would be required at the point at which the application is considered for decision. It is therefore the responsibility of the planning authority to inform LCC at this stage and request a recalculation in order to obtain a definitive figure.**
- **LCC have assessed the viability of this development by assuming the 920 dwellings are all 4 bedroom houses. Should this not be the case a**

**reassessment will be required once accurate bedroom information becomes available. This could result in a reduced pupil yield dependant on dwelling size.**

- **The cost per place used in this assessment is in line with the Education Methodology at the point of assessment. However, the cost per place to be used within the s106 agreement, if this is the district's chosen method of mitigation of the development impact on school places, will be that within the Education Methodology at the point of sealing.**

### **Further Information**

If the education contribution assessment identifies the need for a contribution and/or land to be provided Lancashire County Council is, in effect, objecting to the application. A developer contribution to deliver school places and/or land meeting the school site requirements as detailed in the assessments where school land is required, to Lancashire County Council as the education authority, including indexation will, in most cases, overcome the objection. If a developer does not agree to payment of the requested education contribution or the local planning authority does not pursue Lancashire County Council's request on its behalf, Lancashire County Council cannot guarantee that children yielded by the development will be able to access a school place within reasonable distance from their home, so the development could be considered to be unsustainable. Furthermore, if the planning application is approved without the required education contribution LCC would request that the local planning authority confirm how the shortfall of school places, resulting from the development, will be addressed. (Please see page 10 of the Education Contribution Methodology).

If you require any further information about the assessment process (including the current rates), in the first instance, please refer to LCC's Planning Obligations Education Methodology and supporting information at:

<http://www.lancashire.gov.uk/council/planning/planning-obligations-for-developers.aspx>