

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 schedule¹. 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 **09/11/2023**.

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 SEND². This is calculated in line with the Worcestershire County Council [Policy](#)³ 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: W/23/02112/OUT

Location: Orchard Farm, Defford Road, Pershore, WR10 3BX

Details: Planning application for the demolition of existing farmhouse, agricultural buildings and structures, the erection of a phased development of up to 300 residential dwellings (Use Class C3) and associated public open space, drainage, infrastructure, and engineering works with all matters reserved except access.

District/EPA: Wychavon District / Pershore Education Planning Area (EPA)

For any planning applications submitted to the three district councils that require mitigation of the education impact of the development, Worcestershire Children First will, from the 10th of February 2023, receive planning obligations via Section 106 means only within these districts.

For planning developments that submitted planning applications before the 10th of February 2023 Worcestershire County Council may also utilise funding from CIL contributions.

Number of Dwellings: 300

¹ Education Planning Obligations Policy Worcestershire, 2.2, pg. 4.

² Special Educational Needs and Disability

³ [Education Planning Obligations Policy \(worcestershire.gov.uk\)](https://www.worcestershire.gov.uk)

Other Agreed Applications Within Area of Development:

Planning Application	Number of Dwellings	Early Years Pupil Yield	Primary Pupil Yield	Middle Pupil Yield	Secondary Pupil Yield	SEND Pupil Yield
W/16/03028/OU	75	9	19	11	15	2
W/19/01718/FUL	196	22	48	28	39	3
W/20/02748/FUL	22	3	6	4	5	0
Total	293	34	73	43	59	5
Per Year Group	N/A	12	15	15	12	N/A

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 area of Pershore, in which the proposed development is sited, is within the catchment area of **Abbey Park First and Nursery, Abbey Park Middle and Pershore High Schools**. Other Schools related to this development are **Holy Redeemer Catholic Primary and Orchard Primary Schools**. Related schools are usually schools that are located within a two-mile safe walking route that offer education for children who are eight years or younger, and schools that are located within a three-mile safe walking route that offer education for children who are nine years or older⁴.

The total number of proposed dwellings on site will be (up to) three hundred (300), at present there is not a finalised housing tenure for the proposed development, so no exemptions will be made, and the assessment will be conducted on the basis that all dwellings will generate an education need and qualify for contribution.

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 time⁵.

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 Health & Care plan over the last 5 years, which is 3%⁶.

Pershore EPA 3-Tier System	Early Years	First	Middle	High and 6th Form	SEND Primary	SEND Secondary
Total FTE places	33	73	42	59	3	2
Per Year Group	N/A	15	14	12		

⁴ Based on DFE Guidance on home to school travel and transport (July 2014)

⁵ Education Planning Obligations Policy Worcestershire, 5.6, pg. 11.

⁶ Education Planning Obligations Policy Worcestershire, 5.7, pg. 11.

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 Pershore and forecast to yield thirty-three (33) children who may need childcare places at an early years setting. Updated sufficiency figures for 2022 show there is an **insufficient** level of funded childcare places within Pershore, neighbouring wards do have additional spaces, however there are no safe walking routes between the development and the surrounding wards. **Due to this a contribution to early years will be required to increase numbers within the Pershore ward.**

Early Years Contribution required: **£730,026**

Early Years Contribution Formula:

(N X 0.11) (rounded up to a whole number) x £22,122

300 X 0.11 = 33 X £22,122 = £730,026

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

To be used for the provision of additional education facilities at Abbey Park First and Nursery School or other future catchment school, or at The Orchard Primary School, or Holy Redeemer Catholic Primary schools, or other future related schools.

First School

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

School	Reception	Year 1	Year 2	Year 3	Year 4	TOTAL
* Abbey Park First	27	30	28	43	30	158
Holy Redeemer Catholic Primary [#]	26	26	27	25	18	122
Orchard Primary School [#]	25	23	29	27	29	133
<i>Additional pupil yield from other approved housing</i>	<i>15</i>	<i>15</i>	<i>15</i>	<i>15</i>	<i>15</i>	<i>75</i>
Total	93	94	99	110	92	488
Surplus / Deficit Places	-3	-4	-9	-20	-2	-38

*Catchment Schools

[#] Holy Redeemer Catholic Primary and Orchard Primary School are both primary schools and therefore have seven (7) year groups, however as the Pershore EPA is a three tier, system years 5 and 6 have been attached to the middle phase information section for consistency.

Other relevant information

School	School Capacity	Published Admission Number (Sept 2023)	PAN of largest year group minus NOR in that year group	Number of year groups	Average spare places per year group
* Abbey Park First	150	30	-13	5	0
Holy Redeemer Catholic Primary [#]	150	30	3	5	3
Orchard Primary School [#]	150	30	1	5	5
Totals	450	90			8

*Catchment Schools

[#] Holy Redeemer Catholic Primary and Orchard Primary School are both primary schools and therefore have seven (7) year groups, however as the Pershore EPA is a three-tier system, years 5 and 6 have been attached to the middle phase information section for consistency.Forecast InformationYear of admission to Reception

School	Sept 2023	Sept 2024	Sept 2025	Sept 2026
* Abbey Park First	26	24	29	20
Holy Redeemer Catholic Primary	30	30	30	30
Orchard Primary School	29	26	30	24
<i>Additional pupil yield from other approved housing</i>	<i>15</i>	<i>15</i>	<i>15</i>	<i>15</i>
Totals	100	95	104	89
Forecasted Surplus / Deficit Places	-10	-5	-14	+1

* Catchment School

There are **insufficient** places for the seventy-three (73) first school aged children expected from this development. Therefore, a contribution towards first school provision **will** be sought.

First School Contribution required: **£1,614,906**

First School Contribution Formula:

(N X 0.05 X 5 X 0.97 (rounded up to a whole number) x £22,122

300 X 0.05 = 15 X 5 = 75 X 0.97 = 72.75 = 73 X £22,122 = £1,614,906

To be used for the provision of additional education facilities at Abbey Park First and Nursery School or other future catchment school, or at The Orchard Primary School, or Holy Redeemer Catholic Primary schools, or other future related schools.

Middle SchoolNumber on Roll by Year Group (May 2023 school census)

School	Year 5	Year 6	Year 7	TOTAL
* Abbey Park Middle	34	37	33	104
Holy Redeemer Catholic School [#]	18	30	-	48
Orchard Primary School [#]	30	30	-	60
Pershore High ^{**}	-	-	87	87
<i>Additional pupil yield from other approved housing</i>	<i>15</i>	<i>15</i>	<i>15</i>	<i>45</i>
Total	97	112	135	344
Surplus / Deficit Places	47	32	39	118

*Catchment Schools

[#] Holy Redeemer Catholic Primary and Orchard Primary School are both primary schools and therefore have seven (7) year groups, however as the Pershore EPA is a three-tier system, years 5 and 6 have been attached to the middle phase information section for consistency.

Other relevant information

School	School Capacity	Published Admission Number (Sept 2023)	PAN of largest year group minus NOR in that year group	Number of year groups	Average spare places per year group
* Abbey Park Middle	252	84	47	3	50
Holy Redeemer Catholic School [#]	60	30	12	2	6
Orchard Primary School [#]	60	30	0	2	0
Pershore High ^{**}	90	90	3	1	3
Totals	462	234			59

*Catchment Schools

[#] Holy Redeemer Catholic Primary and Orchard Primary School are both primary schools and therefore have seven (7) year groups, however as the Pershore EPA is a three-tier system, years 5 and 6 have been attached to the middle phase information section for consistency.

Forecast Information

Year of admission to Year 5**

School	Sept 2023	Sept 2024	Sept 2025	Sept 2026
* Abbey Park Middle	42	53	43	40
Pershore High	90	90	90	90
<i>Additional pupil yield from other approved housing</i>	<i>15</i>	<i>15</i>	<i>15</i>	<i>15</i>
Totals	57	68	58	55
Forecasted Surplus / Deficit Places	27	6	22	29

*Catchment Schools

** Pershore High has an intake in Year 7 to provide high school entry for primary schools within the Pershore EPA, this has been included in the Middle School information to remain consistent with the three-tier system within the Pershore EPA.

There are **sufficient** places for the forty-two (42) middle school aged children expected from this development. Therefore, a contribution towards middle school provision **will not** be sought.

High School and Sixth Form

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

School	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	TOTAL
* Pershore High	233	215	229	231	76	102	1086
<i>Additional pupil yield from other approved housing</i>	<i>12</i>	<i>12</i>	<i>12</i>	<i>12</i>	<i>-</i>	<i>-</i>	<i>48</i>
Total	245	227	241	243	N/A	N/A	956
Surplus / Deficit Places	37	55	41	39	N/A	N/A	172

*Catchment Schools

Other relevant information

School	School Capacity	Published Admission Number (Sept 2023)	PAN of largest year group minus NOR in that year group	Number of year groups	Average spare places per year group
* Pershore High	1,128	282	49	4	43

*Catchment Schools

Forecast Information

Year of admission to (8 or 9)

School	Sept 2023	Sept 2024	Sept 2025	Sept 2026
* Pershore High	235	237	268	249
<i>Additional pupil yield from other approved housing</i>	<i>12</i>	<i>12</i>	<i>12</i>	<i>12</i>
Totals	247	249	280	261
Forecasted Surplus / Deficit Places	35	33	2	21

*Catchment Schools

There are **sufficient** places for the fifty-nine (59) high school aged children expected from this development. Therefore, a contribution towards high school provision **will not** be sought.

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 dwellings⁷.

SEND places will be calculated at 4 times the cost of a place appropriate for the phase of education as per government guidance⁸.

There are **insufficient** places for the three (3) primary aged children with SEND and two (2) secondary aged children with SEND expected from this development. Therefore, a contribution towards SEND provision **will** be sought.

SEND Contribution required: £508,768

SEND Contribution Formula:

Step 1. (Primary Contribution) $(N \times 0.05 \times 7 \times 0.03)$ (rounded to the nearest whole number) $\times \text{£}22,122 \times 4^9$

$$300 \times 0.05 = 15 \times 7 = 105 \times 0.03 = 3.15 = 3 \times \text{£}22,122 \times 4 = \text{£}265,464$$

Step 2. (Secondary Contribution) $(N \times 0.04 \times 6 \times 0.03)$ (rounded to the nearest whole number) $\times \text{£}30,413 \times 4$

$$300 \times 0.04 = 12 \times 6 = 72 \times 0.03 = 2.16 = 2 \times \text{£}30,413 \times 4 = \text{£}243,304$$

Step 3.

Step 1 + Step 2 = Total SEND Contribution

$$\text{£}265,464 + \text{£}243,304 = \text{£}508,768$$

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

⁷ Education Planning Obligations Policy Worcestershire, 6.7, pg14

⁸ [Securing developer contributions for education \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

⁹ [Securing developer contributions for education \(publishing.service.gov.uk\)](https://publishing.service.gov.uk) 17. Pg10.

Total Contributions Required

Education Phase	Contribution Required
Early Years	£730,026
First School	£1,614,906
Middle School	£0
High School	£0
SEND	£508,768
TOTAL CONTRIBUTION	£2,853,700.00

The contribution rate is applicable from 1st April 2023 to 31st March 2024. 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

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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](#).