
Appeal Statement of Case: Education

Orchard Farm, Pershore

On behalf of Formula Land Ltd

Local Planning Authority Reference Number – W/23/02112/OUT

Education Statement of Case

- 1.1.1. This Statement of Case has been prepared by the Education Consultancy Service at Savills on behalf of the Appellant. The Education Consultancy Service is provided by Savills Economics and led by Kate Moodey (BA MSc), who has 13 years of experience in working in school organisation teams within local authorities. Her areas of expertise include pupil forecasting and demand analysis, S106 policy for education, and statutory process around education delivery. Kate is supported by the Economics team in delivering the Education consultancy service by Stefanos Zymis and Gabriel Baudard.
- 1.1.2. Stefanos has a Dip in Planning and Regional Development, a MSc in Local Economic Development and is a member of Institute of Economic Development. He has over ten years' experience of undertaking socio-economic assessments and reviewing financial contributions. His areas of expertise include: social infrastructure assessments, demographic modelling and analysis, development contributions review and economic impact assessments. Stefanos has previously prepared education strategies and reviewed education contributions. He has engaged with school authorities through the stages of land promotion, planning application, and s106 negotiation.
- 1.1.3. Gabriel (BCom MSc) has over four years of experience working at Savills in the preparation of Social Infrastructure Needs Assessment as part of planning applications and Environmental Impact Assessments. He has experience with pupil forecasting and school demand and capacity analysis, prepared in the context of large scale, multi-phase, residential-led greenfield urban extensions or brownfield redevelopment.

Planning Obligations Requested Towards Education and School Transport

- 1.1.4. This Statement of Case relates to the planning obligations that have been requested towards education and school transport from the planning application at Orchard Farm, Defford Road, Pershore, WR10 3BX, W/23/02112/OUT.
- 1.1.5. The relevant statutory consultees for matters relating to education and school transport include:
- Worcestershire Children First, a not for profit company 100% owned by Worcestershire County Council (WCC) and responsible for delivering children's services across Worcestershire
 - WCC in its role as Highway Authority
- 1.1.6. No objections have been received from the listed statutory consultees, but both have responded to the planning application. Worcestershire Children First has provided an assessment of the planning obligations required for education, including early years, first school, middle school, high school and special educational needs and disabilities (SEND). A separate response from the WCC Highway Authority includes a request for financial contributions towards the school transport of first school pupils. A summary of the financial contributions that have been requested towards education and school transport is as follows:

Early Years	£730,026
First School	£1,614,906
Middle School	£0
High School	£0
Special Educational Needs and Disabilities (SEND)	£508,768
Total Education Contribution	£2,853,700
School Transport Contribution (first school pupils)	£444,981
Grand Total Contribution Request	£3,298,681

- 1.1.7. Savills has considered the education impact of the proposed development of 300 dwellings and the resulting need for each of the requested financial contributions for education and school transport. This included an examination of the pupil yield from the proposed development and other approved local development sites, birth data, the capacity of local first schools, primary and secondary school forecasts created by WCC and the capacity of special schools in Worcestershire. The result of this assessment is summarised in this statement of case and the evidence will be provided in full should this matter not be resolved prior to the public inquiry and / or during the appeal process.
- 1.1.8. The contributions requested by Worcestershire Children First for early years, first school and SEND are found to be justified, however the request from the Highways Authority at WCC for a separate contribution towards school transport is not supported as this conflicts with the request for funding for the expansion of first schools.

Early Years

- 1.1.9. There is an underlying increase in births in the Wychavon District, and the childcare sufficiency assessment produced by WCC outlines a need for additional funded early years provision in the ward of Pershore. Therefore the financial contribution towards early years places is accepted.

First School

- 1.1.10. There is no spare capacity to manage the need for lower school places arising from the development at Abbey Park First School, which is the nearest lower school to the development, or other first schools within a two-mile walking radius. Therefore the financial contribution towards lower school places is accepted.
- 1.1.11. It should be noted that two miles is the statutory walking distance for a child under 8. A child under the age of 8 is eligible for free travel, organised by the local authority, to their nearest suitable school if it is more than two miles from their home.

Middle and High Schools

- 1.1.12. There is some spare capacity within existing middle and high schools to manage the needs arising from the proposed development. The pupil forecasts created by WCC indicate that this is expected to be the case up to 2029/30. Savills agrees that no financial contribution is required to mitigate the impact of the development on middle and high school capacity.

SEND

- 1.1.13. The 2023 Schools Capacity Return (SCAP) submitted by WCC indicates an overall deficit of 265 SEND school places across Worcestershire. The Vale of Evesham School is the only special school within Wychavon district and is oversubscribed. There is a demonstrable need for financial contributions towards SEND provision.
- 1.1.14. Overall, Savills concludes that the request for contributions towards early years, first school, and SEND provision is reasonable. However, the request for an additional contribution towards school transport for first school pupils is contested. This is due to the inconsistency in requesting both a contribution for the expansion of schools within a two-mile radius of the development and for transport for students eligible for free school transport to alternative schools located beyond this distance.

Conflicting Request for a Financial Contribution Towards School Transport

- 1.1.15. The Education Planning Obligations Assessment from Worcestershire Children First states that the financial contribution of £1,614,906 towards first school places is:

'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'.

- 1.1.16. The justification for the request for a transport contribution is based on the lack of existing capacity at Abbey Park First School, as stated in the response from the WCC Highway Authority:

'In terms of School Transport, the site is located in the First School catchment for Abbey Park First, 0.7 miles away. However, it is understood the school does not have the capacity for the additional pupils generated by this site and, therefore, financial contributions will be required to transport students qualifying for free school transport to alternative schools.'

- 1.1.17. The request for a contribution towards school transport is not supported as this conflicts with the financial request for first schools. The first school contribution will allow for additional capacity to be created nearby, therefore avoiding a need for school transport to schools further away from the development site.

Conclusion

- 1.1.18. As outlined above, it has been possible to identify the need for planning obligations towards early years, first school and SEND provision. The request for a financial contribution towards school transport is not supported as this conflicts, and is negated by, the financial contribution towards first school places. In this case the existence of one contribution nullifies the justification for the other. Without prejudice, further evidence will be provided on behalf of Formula Land should this matter not be resolved prior to the public inquiry and / or during the appeal process.