

ISLAND PLAN



Children's Services Facilities Contributions

Supplementary Planning Document



Adopted May 2014

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1. Why a Supplementary Planning Document is required

- 1.1 The Island Plan Core Strategy was adopted by the Isle of Wight Council in 2012, and is the overarching strategic document within the Island Plan. Policy DM22 (Developer Contributions) of the Core Strategy establishes the strategic principles towards developer contributions on the Isle of Wight, but does not set out precise levels of contributions. It does though give the commitment to prepare Supplementary Planning Documents (SPDs) to set out the mechanisms through which contributions are achieved and to ensure that contributions are based upon a co-ordinated and consistent approach.
- 1.2 Therefore, and in line with central government guidance on developers' contributions¹, the council has prepared this SPD to set out the levels of developer contributions to meet the cost of Children's Services facilities (required as a direct consequence of development) and when it will be required.
- 1.3 For the purposes of this document and s106 contributions, Children's Services facilities are **primary and secondary schools, provision for children with special educational needs and other facilities to support young children and their families.**

2. When are contributions required?

- 2.1 Planning and Regulatory Services, acting as the Local Planning Authority (LPA), will work with Children's Services when it receives planning proposals relating to a development of 10 dwellings or more. This will then form part of pre-application/scoping discussions, to ensure that the requirement for a contribution is identified at the earliest stage in discussions with the LPA. This will also take place when sites are proposed for allocation through the Island Plan process. Where it is confirmed that the availability of school places is required, contributions will be sought in relation to each additional dwelling proposed.
- 2.2 It is important that a developer considers all likely costs relating to a development right from the start of a project (this may well be before the LPA is involved), in order to ensure development costs are properly reflected in land value and therefore reducing the likelihood of a proposal not being financially viable.
- 2.3 Where proposals for new development would result in the requirement for a new school, the Isle of Wight Council will expect the developer to provide, within the required timescales, a cleared, fully serviced and accessible site free of charge, in addition to the normal level of contributions towards school buildings. Children's Services needs to be consulted early in any master planning of such developments to ensure that any proposed school sites are appropriate and suitable for its requirements.

¹ Paragraph 204 of the National Planning Policy Framework (NPPF) and Regulation 122 of the Community Infrastructure Regulations 2010

- 2.4 The council has given a commitment in the Core Strategy to 'be flexible in its applications of the requirements of the Core Strategy policies, to ensure delivery and that the broad objectives of the Core Strategy and indeed the Council are being met'. If developers state that viability is the reason why the proposed development cannot provide the contribution, then an open book viability assessment will be required. Further information is set out in policy DM22 Developer Contributions and its supporting text.

3. What level of contribution is required?

- 3.1 In order to satisfy the requirements in the NPPF and CIL Regulation 122, Children's Services will make an assessment of the extent of capacity in schools in the appropriate area. This will indicate the extent to which additional capacity will be required to cater for the additional demand created by development proposals. This will be referred to as the "sufficiency" factor.
- 3.2 It is the council's intention that new primary schools be provided within major new housing areas, where justified by the number of children likely to be living there when the development is complete. Where the additional demand is not enough for a new school, in the interests of integrating new development into existing communities and to promote sustainability principles relating to travel to school, it is expected that a new development will be served by its nearest schools.
- 3.3 It has been accepted by the Audit Commission² that not all unfilled places in a school are surplus places, but that some margin of capacity is necessary to allow parental choice, given that there will be volatility in preferences from one year to the next, and to allow for differences in the size of individual cohorts. Whilst no specific margin was suggested by the Audit Commission, the position of Children's Services is that a school should be considered as full when it has less than 5% of its places unfilled.
- 3.4 Taking this into account, in those cases where there will be a shortfall in places to meet the assessed demand the amount of contribution can be calculated in accordance with the figures set out in paragraphs 3.19 and 3.20 and Table 3.3 of this document.
- 3.5 Even where there is apparently sufficient capacity to cater for all, or part, of the additional demand, there may still be a need for additional facilities at a school. The reason for this is that the method of assessing capacity does not take full account of the need for schools to have dedicated space for specialist facilities, such as ICT (Information and Communications Technology).
- 3.6 Also, the inclusion of children with special educational needs in mainstream schools means that schools need spaces which can be used for individual or small group teaching, which is unlikely to have been provided in the original room allocations. In other words, schools which have theoretical spare capacity will be using those spaces for legitimate educational uses, which will need to be rehoused before those teaching spaces can be brought back

² Trading Places: 2002 Update, The Audit Commission, 2002

into use for general class use. There may also be factors, such as an undersized hall, which would mean that it would be difficult to meet present day educational requirements if the school was full to its assessed capacity. These can be referred to as "suitability" issues.

- 3.7 Suitability issues are assessed as part of the Asset Management Plan for the school. Developers' contributions will be expected where it is necessary to remove limitations so that existing nominal capacity can be fully used to meet additional demand from a development. The cost of alleviation will vary and will need to be assessed on a case by case basis, as proposed in paragraph 3.23.

School Sites

- 3.8 The actual site required for a new school will depend on several factors, including location, access, shape, topography and the relationship with adjacent community and other land uses. The minimum useable areas should be as follows:

Table 3.1: Indicative size requirements for new Primary Schools

Type of entry	Size
1 Form entry primary (210 places)	1.2 hectares
2 Form entry primary (420 places)	2.0 hectares
3 Form entry primary (630 places)	2.8 hectares

- 3.9 Detailed discussion will be necessary in order to agree the actual boundaries of any school site allocated, including the location and timing of access and services. Further land may be required where it is necessary to provide additional facilities co-located with the school.
- 3.10 The areas required for new secondary schools will depend on the size of school proposed.

How many places are required?

- 3.11 In order to assess the long term demand arising from a new development, Children's Services use the following factors:

Table 3.2: Pupil yield multiplier

Type of school	Children per dwelling
Primary Schools (ages 4 to 11)	0.25
Secondary Schools (ages 11 to 16)	0.18

The lower secondary factor is because secondary schools cater for five year groups, compared with seven for primary schools.

- 3.12 These factors apply to all dwellings with two or more bedrooms, excluding those specifically for elderly persons (dwellings expected to make education contributions can be referred to as "eligible dwellings"). It is not appropriate to make any deduction in respect

of “affordable” housing, as these will still increase the overall number of dwellings in an area which can be occupied by families with children.

Contributions towards other children's services facilities

- 3.13 In addition to the provision of schools for children of statutory school age, the council has a duty to ensure that there is adequate provision for pre-school education and childcare (although not normally as a provider itself). Traditionally, pre-school playgroups have been considered as potential users of community buildings. However, with the increasing requirements for facilities and numbers of sessions that have to be offered, there is a trend towards pre-school providers looking for exclusive use of space. This will also facilitate the establishment of full day care and after school clubs.
- 3.14 The Local Planning Authority will bear this in mind in considering allocations of space for, and contributions towards the cost of providing, community facilities within any new development. The Children's Services department will provide a calculation to assess the appropriate level of demand for pre-school facilities which can be found at the following link:

<http://documents.hants.gov.uk/childrensservices/EarlyYearsPlacesPlanningdocument2013.doc>

Special educational needs

- 3.15 Wherever possible, children with special educational needs are educated in mainstream schools. For some specific needs, it is appropriate to provide additional resources and, in a small number of cases, to provide places in special schools or education centres.
- 3.16 Larger developments may generate a need for additional facilities. This can only be determined by the assessment of individual situations.

What level of contribution is required?

- 3.17 In cases where a sufficiency factor has been identified, the actual cost of providing additional places will vary with the individual school, depending on factors such as the type of building and actual site characteristics.
- 3.18 It should be noted that the figures shown in 5.3 below are guideline figures only and where actual costs are higher than those calculated from these guidelines the actual building costs will be sought.
- 3.19 In order to provide a guideline figure, a detailed analysis has been undertaken, based on actual projects designed and tendered in recent years. From this the following costs per place are indicated, at 4th Quarter 2011 prices (PUBSEC Index 180) in Tables 3.3 and 3.4.

- 3.20 The cost per place for a new one form entry primary school is higher than that for a two form entry school as a consequence of the need for core facilities (such as a hall, library, music / drama room, offices and staffroom) that are required in addition to the basic classroom spaces. The exact requirement will need to be determined when development details are being formulated, and in particular when a school larger than two form entry is indicated, where a school will need to be significantly enlarged or where it is necessary to extend separate infant and junior schools serving the development.

Table 3.3: Cost per pupil place for Primary Schools

Primary schools	
New Schools	
1 Form entry (210 places)	£20,925 per pupil place
2 Form entry (420 places)	£16,479 per pupil place
3 Form entry (630 places)	£15,578 per pupil place
Extensions to existing schools	
Extension	£16,856 per pupil place

Table 3.4: Cost per pupil place for Secondary Schools

Secondary schools	
New Schools	
All forms	£33,284 per pupil place
Extensions to existing schools	
Extension	£29,305 per pupil place

- 3.21 Owing to the complexities of providing a new secondary school the figures quoted are guideline only and a site specific calculation will be necessary to derive the actual cost of a new school or if the development is in an area where secondary schools cater for the 11-18 age range.
- 3.22 In order to calculate a contribution per individual "eligible dwelling" it is necessary to apply these cost multipliers to the numbers of additional children expected from new housing (as set out in Table 3.2 above). All calculations are rounded up to the nearest pound. Applying these factors, the following level of contribution is derived:

Table 3.5: Contribution levels for Primary Schools

Form Entry	Calculation	Contribution level
1 new FE required	£20,925 x 0.25	£5,231 per eligible dwelling
2 new FE required	£16,479 x 0.25	£4,120 per eligible dwelling
3 new FE required	£15,578 x 0.25	£3,895 per eligible dwelling
Extension	£16,856 x 0.25	£4,214 per eligible dwelling

Table 3.6: Contribution levels for Secondary Schools

Requirement	Calculation	Contribution level
New school required	£33,284 x 0.18	£5,991 per eligible dwelling
Extension	£29,305 x 0.18	£5,275 per eligible dwelling

3.23 As mentioned in paragraph 3.7, the cost of alleviating suitability factors will vary, depending on individual circumstances. Where a specific facility can be identified and costed, for example where a primary school lacks an adequate school hall, the contribution will be based on the projected cost.

4. How will contributions be collected?

4.1 The Local Planning Authority will work with Children's Services to obtain contributions. The Children's Services department should be involved at all stages of the planning process.

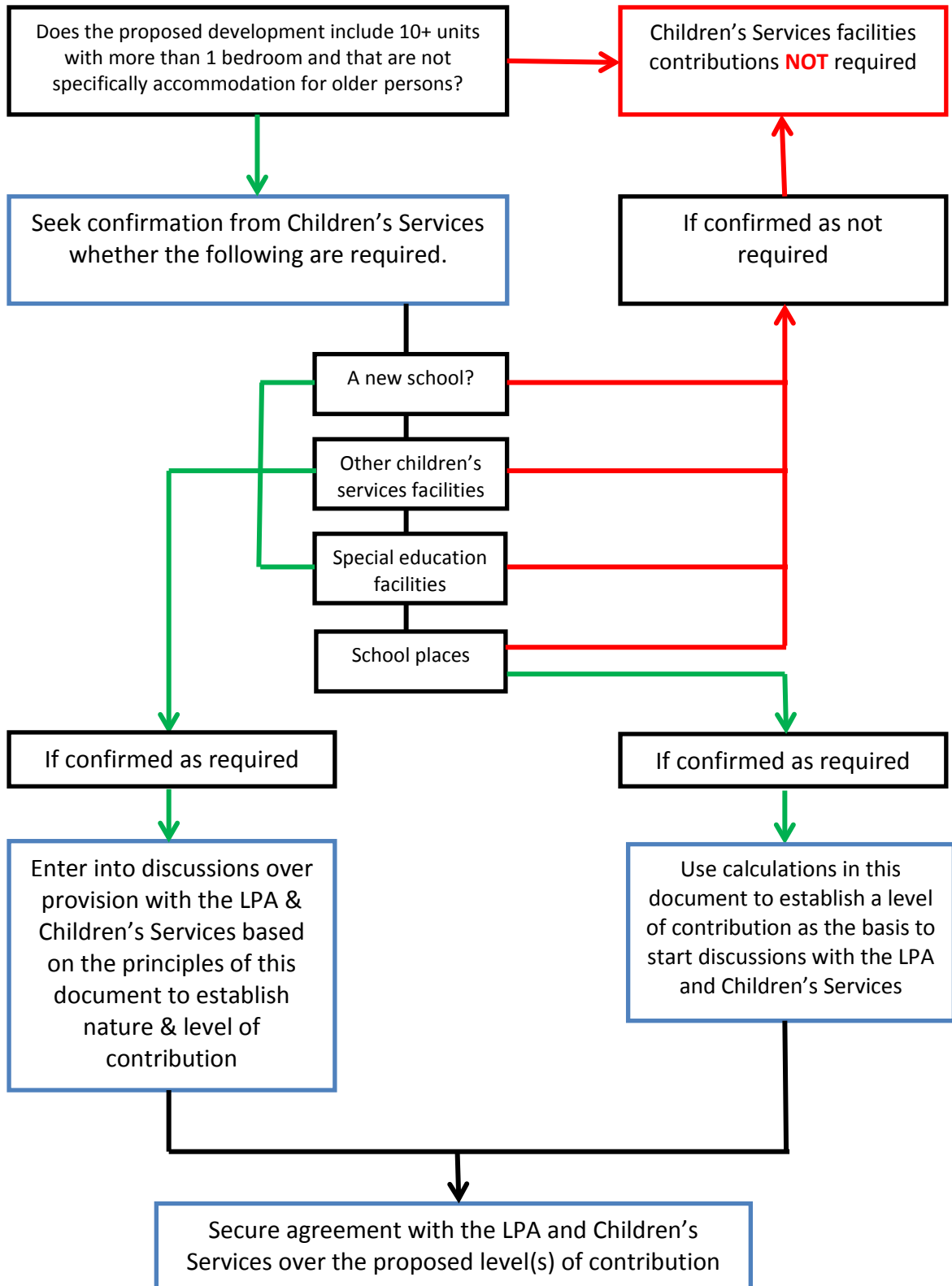
4.2 Where a large development is shared between several developers, it may be appropriate to make provision in the Section 106 agreements so that the burden falls on all those involved. If this is the case, it will be necessary to discuss the exact mechanism that is applicable.

4.3 There may be cases where a new school is proposed within a new development, but the optimum location, once the development is completed, cannot be provided with access and/or services by the time that the school is required. In such cases, it will be necessary for the developer to make a site available on which a temporary school can be provided, in which case the cost of the temporary buildings, access and services would also need to be met by the developer in addition to the normal level of contributions.

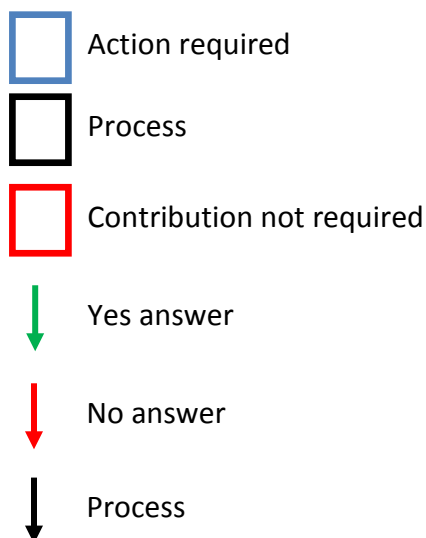
4.4 The agreed requirements will be included as obligations in a Section 106 agreement or through the Community Infrastructure Levy, whatever system is adopted by the Isle of Wight Council.

4.5 Legal agreements will provide for the agreed contributions to be index-linked to building costs (the PUBSEC index published by the Department for Business, Innovation and Skills) and for appropriate triggers for payment, related to the intended phasing of development.

Process Flowchart



Process Flowchart Key



Contacts

Any general enquiries regarding developers' contributions should be addressed to:

Planning Policy
Telephone 01983 821000
e-mail: planning.policy@iow.gov.uk

Any enquiries about individual proposals should be addressed to the School Organisation Officer as follows:

Glenn Parkinson
Telephone 01962 846664
e-mail: glenn.parkinson@hants.gov.uk

or addressed to:

County Council Children's Services Department
Elizabeth II Court North
The Castle
Winchester
SO23 8UG