

Education Briefing Note

Land South of Funtley Road, Funtley,
Fareham, Hampshire
P20/1168/OA

Reside Developments Ltd

Final: 18 December 2020

HEATHER KNOWLER
MA, BA (Hons), MCMi

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Version Control

Version	Main Changes	Date
Draft V1	First Draft	3 December 2020
Final	Finalised Version	18 December 2020

Introduction

1.1 This report has been produced to support an application by Reside Developments Ltd at land South of Funtley Road, Funtley to the north of Fareham. The particular focus of the report will be the potential impact of the site on local education facilities and a review of whether the need for additional facilities may arise as a consequence of the proposed additional residential development.

1.2 The application (P20/1168/OA) is for a total of 125 new dwellings. A previous application for 55 dwelling (P18/0067/OA) was approved on 2 September 2020.

1.3 The site is located to the west of the village of Funtley and north of the M27. It lies within the Ward of Fareham North.

1.4 Fareham Borough Council (FBC or the “Borough”) is the planning authority, while the education authority for the area is Hampshire County Council (HCC).

1.5 FBC has a published Local Plan covering the period 2006-2026 a revision of which was adopted in July 2015. The Borough Council has an adopted CIL Scheme, but from February 2018 education facilities were removed from the Scheme. Consequently, S106 remains the default position for any mitigation required for education facilities within the Borough.

1.6 HCC has a published methodology on “Developers’ Contributions towards Children’s Services Facilities” dated September 2019.

1.7 In November 2019 the Department for Education (DfE) published revised guidance entitled “Securing developer contributions for education”. This guidance draws together current planning and education legislation to provide education authorities with the information upon which to base their approach to seeking education contributions. It is now widely referred to by education authorities and will form part of the basis of the approach within this report.

1.8 This note will look carefully at the trends in dwelling delivery, of births and the age of the population in the area over the last decade. The history of dwelling delivery identifies the proportion of new households, which are often characterised by a younger population. The trend in birth numbers, too, is often linked to dwelling delivery and if rising, to younger populations. Births also indicate the future demand for school places. The trend in the median age of the population is an indicator of the nature of the area and how stable it is. The assumption is that the population should reflect national norms, which includes its ageing. When

the balance of dwelling delivery does not maintain the median age of the population at around the national norm, there are implications for social infrastructure. Finally, trends in overall current and future population are assessed, together with the impact of household movement into and out of the Council area.

1.9 Existing local schools are identified and mapped, with Google Earth providing the approximate walking distances from the proposed development. The relevant schools, having been selected by distance are then described for capacity, numbers of pupils by age and occupancy levels.

1.10 The data used throughout this report is the most up to date available within the public realm. It should be noted, however, that some data sources are updated more frequently than others and due to this it is not possible in all circumstances to cover the same time, geographical and data sequences. In addition, Ward boundaries are occasionally changed and, again, this means that comparable data is not always available.

Statutory and Planning Policy Matters

2.1 The Local Planning Authority is required to determine planning applications in accordance with the Development Plan unless material considerations indicate otherwise.

2.2 **Planning law** prescribes circumstances where local planning authorities are required to consult specified bodies (known as statutory consultees) prior to a decision being made on an application. In two tier authorities, the County Council is a Statutory Consultee as a Planning Authority¹ and as a Highways Authority², there is no blanket inclusion of other Council functions.

2.3 The Local Planning Authority consults with the Education Authority as a Non-Statutory Consultee³.

2.4 **Education law** requires the Education Authority to secure sufficient schools for its area. The statutory duties of an education authority are set out in the Education Act 1996 (as amended). In respect of schools, and inter alia school places, section 14 applies. Section 14 is supplemented by Regulation 3: The

¹ Para 7 of Schedule 1 to the town & country Planning Act 1990, Article 21 Development Management Procedure Order and Schedule 4(b)(c) Development Management Procedure Order.

² Schedule 4(g)(h)(i) Development Management Procedure Order

³ Statement of Community Involvement (Feb 2019) appendices 2 & 3 simply says Suffolk County Council (all relevant departments).

Education (Areas to which Pupils and Students Belong) Regulations 1996⁴. Regulation 3 says that a person shall be treated as belonging to an area of the education authority in which he is normally resident or, where he has no ordinary residence, the area of the authority in which he is for the time being resident.

2.5 Regulation 3 gives a voice to the various particularities in the superceded education acts from 1870 through to 1996.

2.6 The duty under the Act is not an absolute duty. But the circumstances on the day or a state of emergency have been determined by the Courts to be the only satisfactory excuse.⁵

2.7 Despite the s14 duty being described as thus, the statutory duty of the education authority to achieve sufficiency of provision is not fettered in any way. Thus, whilst the education authority sits outside of the town planning system, not being a Statutory Consultee, it is a Non-Statutory Consultee because (a) it is on a list created by this LPA and (b) it might be affected by its decisions.

2.8 The coverage of the duty imposed by s14 is greater than the needs of its general population and those attributed to permitted new housing. This includes all manner of transient and future populations, however unexpected. The education authority must plan for and secure capacity to accommodate the decisions of the town planning system and the clearly stated priorities for housing growth. It must presume the possibility of planning permission being granted. There are funding mechanisms in place for the impact on the school infrastructure of new housing in areas with a CIL charging regime set at zero or sites where the LPA agrees that viability matters prevent funding by new development. There is also a funding pot where developer funding is delayed.⁶

2.9 It is clear that the duty to secure sufficient provision (s14) is very wide ranging and all encompassing. The bar is set extremely high and whatever the circumstances, were the LPA to grant permission, the education authority is compelled by statute, if there is no or insufficient existing surplus, to secure sufficient additional provision.

⁴ SI 1996 No. 615

⁵ See *Meade v London Borough Haringey* [1979] 2 All ER 1016 at 1027, *R v Liverpool City Council, ex p Ferguson* [1985] IRLR at 50 and *R v Secretary of State for Education and Science, ex p Avon County Council* (No 2) (1990) 88 LGR 737n, [1990] COD 349.

⁶ Joint letter from DCLG & DfE to Chief Executives – Supporting housing development to increase housing supply 09_02_2016

2.10 The Education Act (s497 EA96) contemplates default or failure by an education authority to discharge any duty under education act and the Secretary of State if satisfied of the failure can issue instructions or step in.

2.11 By virtue of the fallback provisions on grounds of viability (see paragraph 2.8 above) and the priority given to the delivery of new housing by the planning system, it is unlikely that a permission without the requested developer funding (\$106/CIL) is a material consideration. To argue otherwise gives a non-statutory consultee a veto.

Site Context

3.1 The proposal is for a development of approximately 125 dwellings on land to the south of Funtley Road, Funtley, to the north of the M27 and Fareham. A previous application for 55 dwellings on the same site was approved in September 2020.

3.2 The location of the site is shown in Map 1:



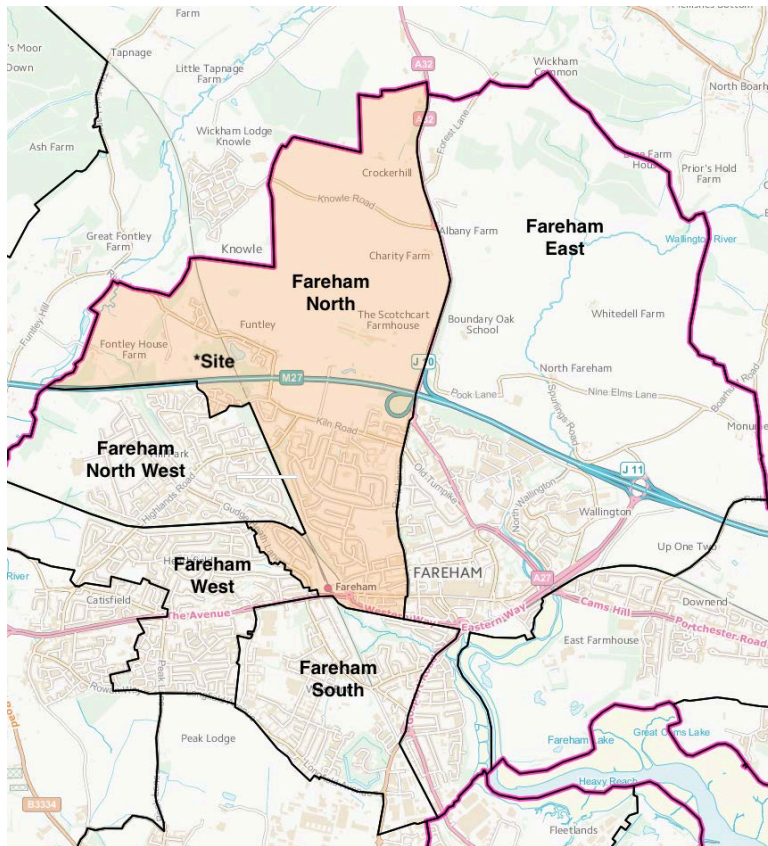
Map 1: Site Location Plan – boundaries approximate

3.3 The dwelling mix for this development has not been finally established at this stage but is proposed to be broadly as shown in Table 1.

	1-bed	2-bed	3-bed	4-bed+	Total
Percentage	15	46	48	16	125

Table 1: Potential mix

3.4 The site sits within the Ward of Fareham North. Given the proximity of the site to the town of Fareham and to give a balanced assessment, the five Wards comprising the majority of the town will be used in this assessment. The site location and the Wards are shown in Map 2:



Map 2: Fareham Town Wards 2020 (OS Election Maps)

Local Demography

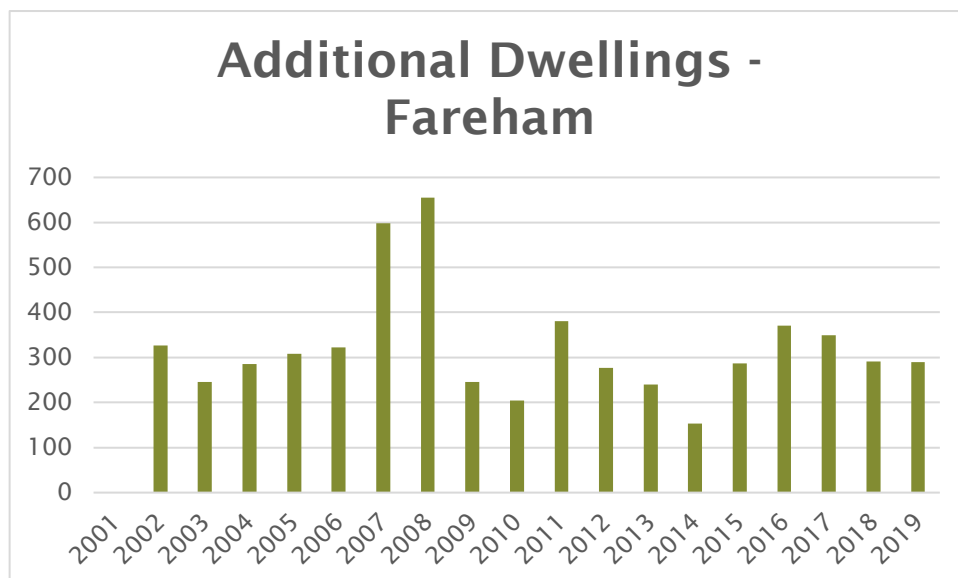
Dwellings

4.1 By 2019 the Borough comprised 50,200 dwellings (Table 2). There was an increase of 5,832 dwellings in the Borough over the 18-year period⁷ shown. This is a total increase of 13.1% over the period - an average increase of 343 dwellings (or 0.69%) per annum. This represents a slightly lower level when compared to national figures.

Dwellings	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Fareham	44368	44695	44941	45226	45534	45856	46454	47109	47355	47560	47941	48218	48458	48612	48899	49270	49619	49910	50200
Change		327	246	285	308	322	598	655	246	205	381	277	240	154	287	371	349	291	290

Table 2: Occupied Dwelling numbers - District

4.2 The numbers of additional dwellings per annum since 2001 are shown in Graph 1. This shows that the number of additional dwellings per annum rose to a peak in 2007 and 2008 but then fell significantly in 2009. Since 2011 additional numbers have remained approximately 300 per annum.



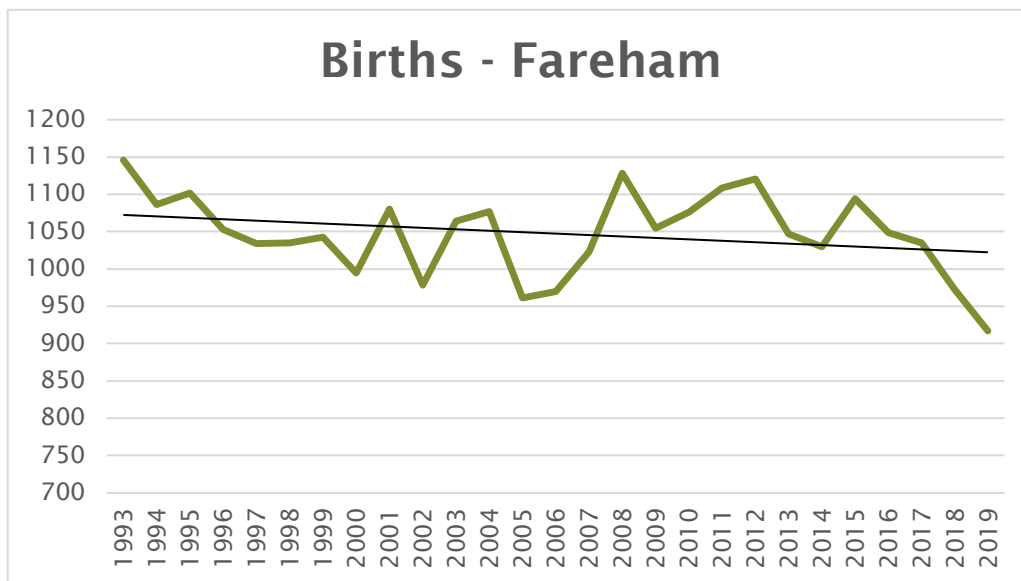
Graph 1: Additional dwellings per annum - District

⁷MCHLG 2019

4.3 Across the whole period the average number of additional dwellings was 343 per annum. This is lower than the 412 (approximate) dwellings anticipated within the Local Plan (112 per annum plus 300-315 from the new Welborne Garden Village).

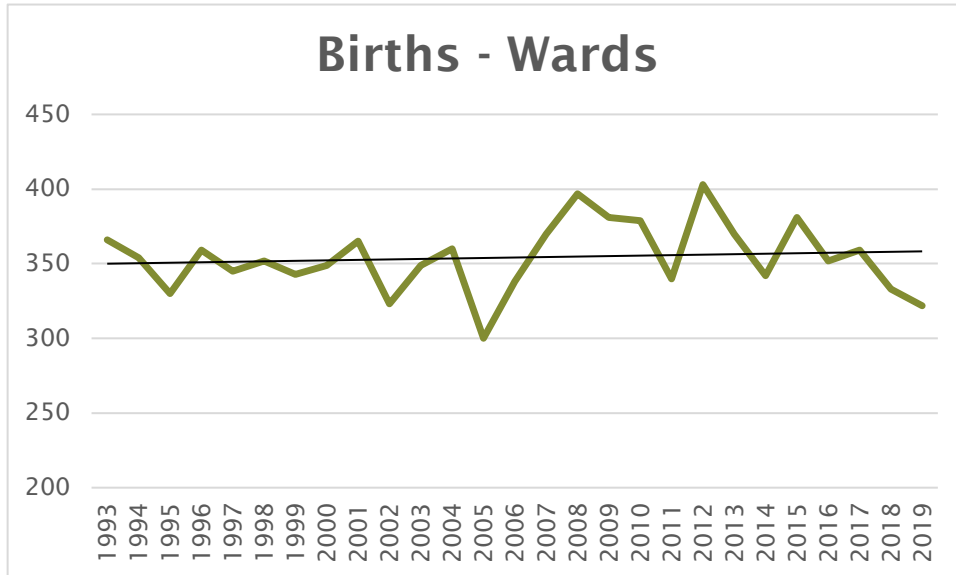
Births

5.1 Graph 2 shows the numbers of births in the Borough between 1993 and 2019. There has been an average of 1,047 births per year across the period. The number of births per annum started the period at a peak of 1,146 in 1993. From there numbers fell through to 2005 (961), at which point they recovered to approximately 1,128 per annum in 2008. Births now appear to be in decline again with 2019 returning a period low of 917. Through the entire period, the trend has been one of slightly decreasing numbers for the Borough.



Graph 2: Births - Borough

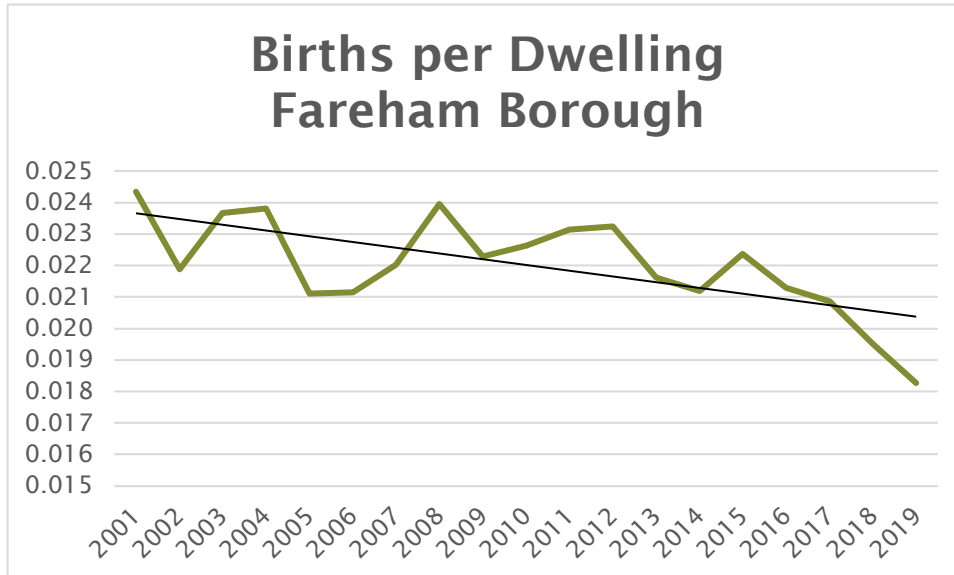
5.2 The picture within the five Fareham town Wards show a similar fluctuating pattern, but with a slightly rising profile across the period – with an average of 354 per annum (Graph 3). As with the Borough as a whole, the town of Fareham experienced a fall in births to 2005, followed by a rapid recovery to a peak in 2008. While within the Borough as a whole, births appear to be declining, the picture within Fareham town has been slightly more buoyant.



Graph 3 - Births in Five Town Wards

5.3 A comparison of births per dwelling (Graph 4) within the Borough indicates that despite some fluctuations, the number of births per dwelling has fallen significantly between 2002 and 2012. As with birth numbers for the Borough, the number of births per dwelling is at its lowest since 2001. Thus, it is clear that the number of additional dwellings provided within the Borough has not been sufficient to maintain a stable birth rate. A slight lift in 2008 mirrors the peak in additional homes in the Borough but that increase has not been sustained.

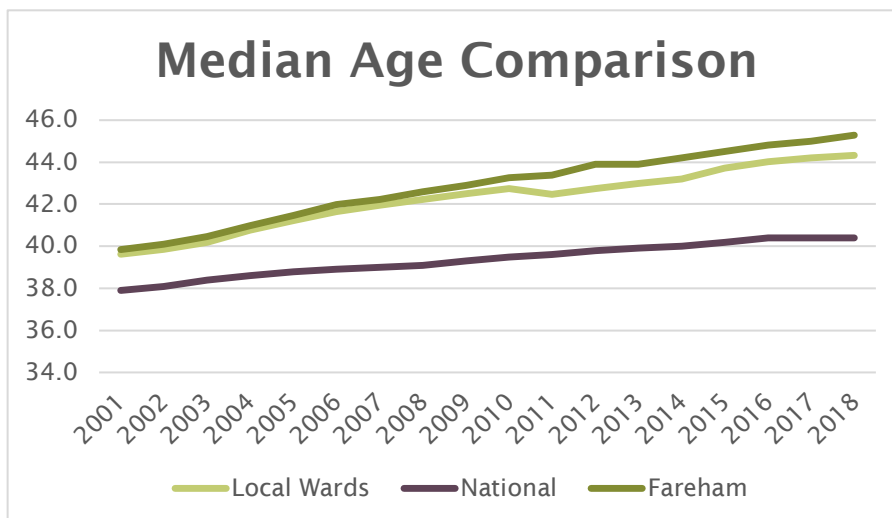
5.4 It is likely that the number of births per dwelling in the Town Wards will be higher, given the slightly increasing birth numbers. However given the significant decline across the Borough, a decline is anticipated.



Graph 4: Births per dwelling

Age

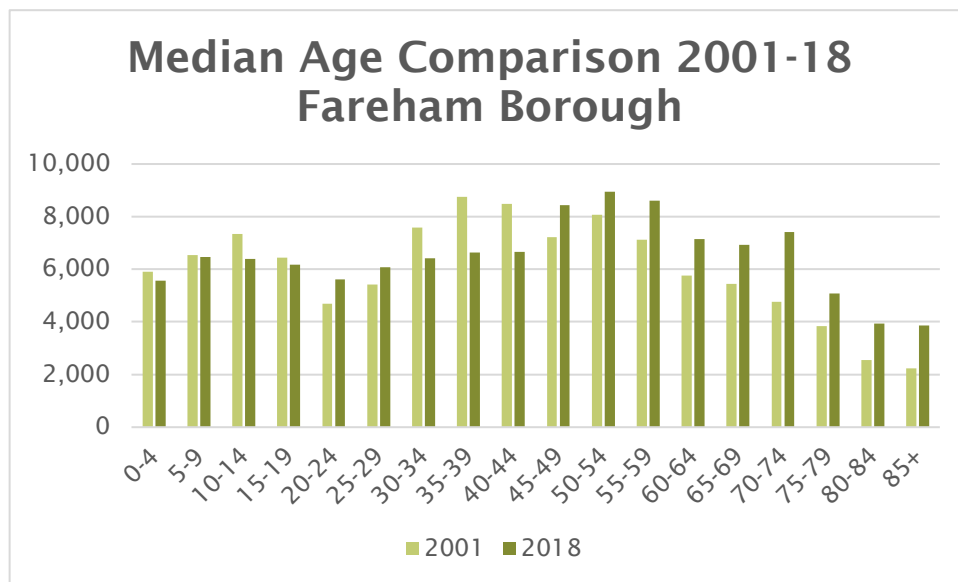
6.1 The median age within the Borough started the period at 39.8 years old, 1.9 years above the national average. It has risen throughout the period, more rapidly than the national average, ending at 45.29 years old – 4.9 above the national average (Graph 5).



Graph 5: Median Age Profiles – Wards, Borough & National

6.2 Within the Wards, the average age is slightly lower than that of the Borough, but it too has risen more rapidly than the national average. It started the period 1.7 years above the national average and ended it 3.9 years above. As suggested by the difference in birth rates between the town of Fareham and the whole Borough, the town hosts a slightly younger population, but both areas are on average older than the national population by some years.

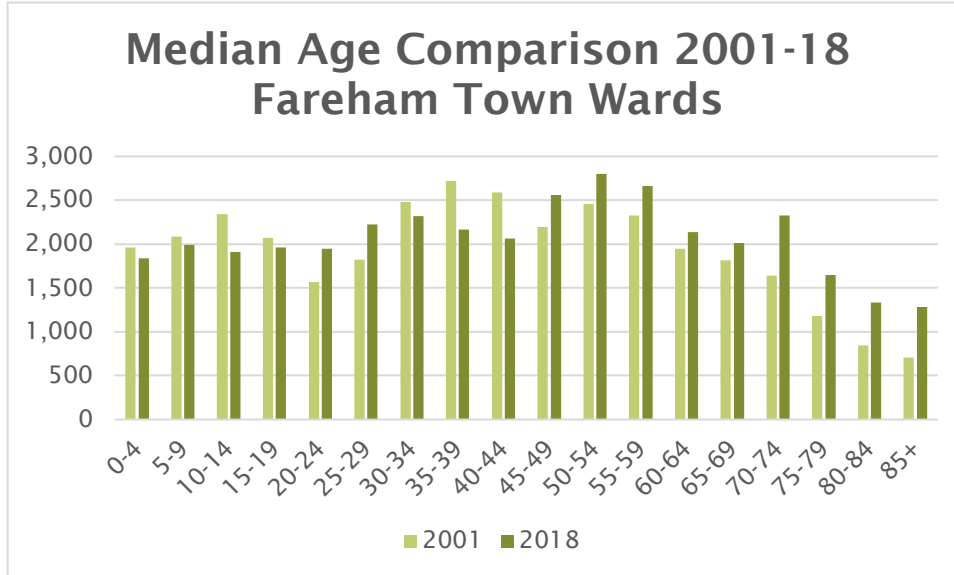
6.3 The change in age profile of the Borough's residents compared between 2001 and 2018 are shown in Graph 6. There were more individuals aged 45+ in 2018 than were resident in 2001, again, representative of an ageing population. There was also a more modest increase in numbers of residents in their twenties, but considerably fewer between 30 and 44 years.



Graph 6: Age profile comparison - Borough

6.4 With regards children, there were fewer in each year group in 2018 than in 2001. This is not a common trend at present, but it is clear that the fall in residents of child-bearing age has had an impact on the number of children in the Borough.

6.5 When the Town Wards are examined (Graph 7), the trends are very similar, with increases in those in their twenties and of 45+, but decreases in child numbers and of residents of 30-44 years.

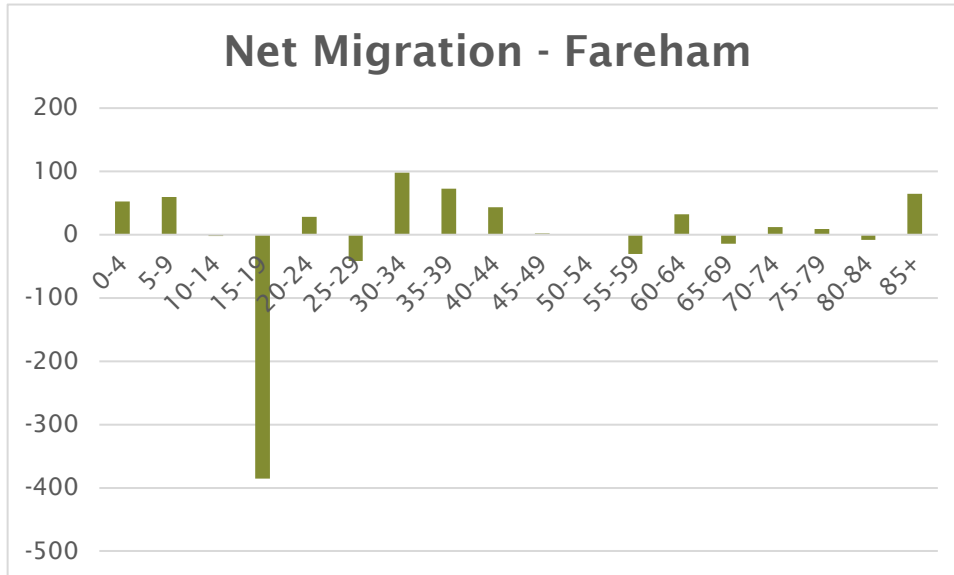


Graph 7: Age profile comparison - Town Wards

6.6 There are slightly more children of 5-9 years resident in 2018 than those of 0-4 and 10-14, which suggests a small peak of children is moving through the system.

Migration

7.1 ONS data on moves undertaken in 2018 shows that the Borough experienced net outward migration overall in that year, but only by the slightest margin. Of a total of 12,243 moves into and out of the Borough, 6,119 moved into the Borough and 6,124 moved out - an outward net migration of just five individuals. The detail is shown in Graph 8 and Table 3.



Graph 8: Impact of Net Migration Into and Out of the Borough - 2018

Age Group	0-4	5-9	10-14	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85+	Totals
Out of Fareham	325	244	194	560	866	838	615	408	292	309	314	312	198	177	149	89	105	129	6124
In to Fareham	378	304	192	175	894	796	713	481	335	311	315	282	230	163	161	98	97	194	6119
Net Migration	53	60	-2	-385	28	-42	98	73	43	2	1	-30	32	-14	12	9	-8	65	-5

Table 3: Impact of Net Migration Into and Out of the Borough - 2018

7.2 The data shows that in 2018, the largest group moving into the Borough where those between 30 and 44 years old - together with children up to nine years old and a number of individuals of 85+. The most notable trend, however, is the number of 15-19 year-olds who leave (most likely to attend university) and who stay away.

7.3 The Census data at Ward level for 2011 provides information as to where individuals moved from when moving into dwellings within all Wards within Borough area (Table 4). A total of 45.8% of moves into dwellings within the Wards were either from within the Ward itself (12%) or from within the District (33.8%). Of the remainder, 48.3% came from elsewhere in the UK while 5.9% moved in from abroad.

Area	Non-Movers	Total Moves into Dwellings	Moved within Ward	Moved into Ward from District	Moved into Ward from UK	Moved into Ward from abroad
All Fareham Wards	100,982	10,599	1,267	3,580	5,123	629
% of Movers		100%	12%	33.8%	48.3%	5.9%

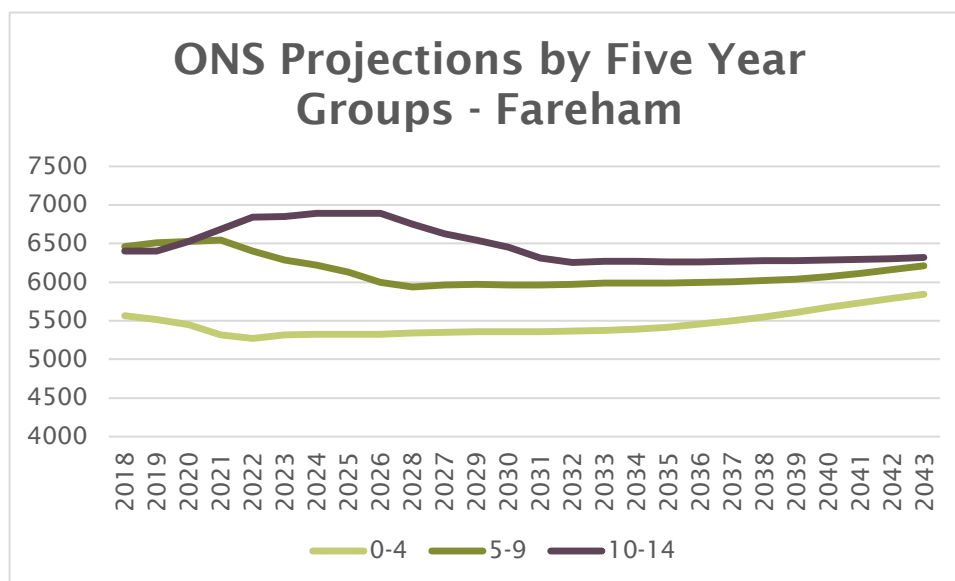
Table 4: Ward moves data 2011 (Census)

7.4 The implications of this are that 45.8% of individuals moving into housing within the Fareham Borough already lived in the Borough, and 12% moved within their existing Ward. Their children would already either have had a school place and would not have needed to be additionally provided for, or they would already have been included within forecasts, having been registered with a local GP as a baby. While this does not mean that a school place would have been available in the immediate locality, at the very least 12% of individuals who moved did so within their home Ward, suggesting that any children associated with those households would have remained at the school they were already attending or forecast to attend.

Longer Term Population Projections

8.1 The most recently published ONS Projections for longer-term population changes based on 2018 show that the population of the Borough is projected to grow from 98,622 in 2018 to 117,014 by 2043 – an increase of approximately 18,352 (18.6%).

8.2 As the current projections stand, however, while the number of children of school age as a whole are projected to rise, the increase is not currently expected to be of the same magnitude – at approximately 3.5%. There are, in addition, variations between the cohorts and across time, and the trends are shown in Graph 9 for five-year grouped cohorts.



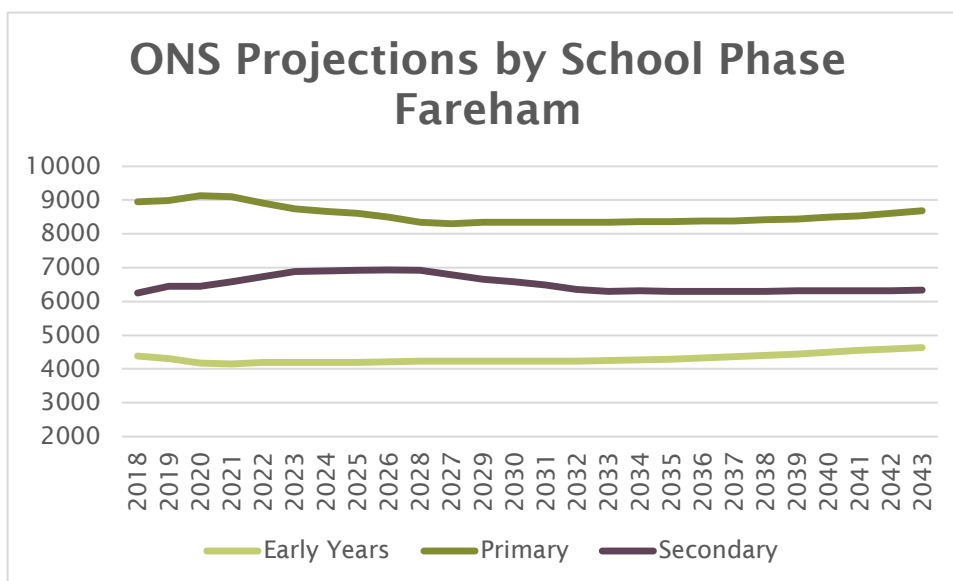
Graph 9: ONS Child Projections in five-year cohorts - Lancaster District

8.3 For the 0-4 years age-group, numbers are projected to fall in the first five years and should then rise very gradually through to around 2035, at which point numbers are projected to rise slightly more quickly through to the end of the period. This is expected to produce 279 additional children between 2018 and 2043 (529 from 2020).

8.4 The 5-9 years age-group, is projected to peak in 2021, at which point it is expected to decline significantly through to 2026 before levelling out for a number of years. Numbers are projected to start to increase gradually from around 2040 onwards. This is expected to reduce numbers by 247 pupils (329 from 2020).

8.5 For the 10-14 years age-group the picture is some years behind, in that it is currently experiencing a strong increase, which has already passed through the other age groups. This is projected to peak between 2022 and 2026, decline through to 2032 and then flatten, in line with the other age groups. This is expected to reduce numbers by 79 across the period (-362 from 2020).

8.6 When the five-year cohorts are converted to pre-school, primary and secondary groups (excluding sixth form), the following projections are revealed (Graph 10):



Graph 10: ONS Projections by School phase – Fareham District

8.7 As with the five-year age groups, the primary and secondary phase is projected to see increases prior to numbers reducing and stabilising, but the increases projected by school cohort are more moderate than for the five-year cohorts.

8.8 When taken from 2020 to 2043 the following changes are projected:

- Pre-school – increase of 485
- Primary – decrease of 412
- Secondary – decrease 242

8.9 It is clear that pupil numbers have expanded over the last eight to 10 years and that a significant “bulge” of children is working its way through the system. It has now moved into the secondary school phase and will take a number of years to work through. After 2027, however, the pressure should start to reduce for that cohort. For the primary cohort, numbers have completed their rise and should now reduce through to 2038 followed by a projected upturn. The pre-school cohort is anticipated to remain level for the majority of the period but is expected to start to increase gently rise gently from 2038.

8.10 A review of the 2019 ONS Mid-Year Estimates (MYE) for the five Fareham Town Wards indicates that the primary figures in the town appear to have reached a plateau prior to starting to decline (Table 5 – orange highlight), in line with the ONS main Projections for the short term. The secondary cohort of children (blue

highlight) is set to rise. It should be noted here that the secondary schools are likely to have wider catchments than the immediate town, and so these figures may not fully represent the actual numbers likely to enroll in schools, but they do provide an indication as to local trends.

Age	Age0	Age1	Age2	Age3	Age4	Age5	Age6	Age7	Age8	Age9	Age10	Age11	Age12	Age13	Age14	Age15
Children by Year of Age	299	363	368	376	364	377	386	408	408	404	368	408	385	373	360	400
2019								2715								1926
2020							2723						1894			
2021						2687							1938			
2022					2642						1973					
2023				2533							1996					

Table 5: ONS MYE 2019 for Six City Wards – showing potential future local trends

Demographic Summary

8.11 In summary:

- Additional housing within the Borough has remained relatively stable over the last two decades but experienced a significant peak in 2007-8. It does not appear to have reached the levels currently set for delivery per annum.
- Births across the Borough since 1993 have evidenced a downward trend, but with numbers of births within Fareham town going against that trend showing a slight average rise through the period. In the Borough a significant reduction in births per dwelling has been witnessed since 2015.
- Median age – both the Borough and Town Wards have a median age which is above the national average. The Town's median age is slightly lower than the Borough as a whole, which is reflective of urban areas. Both the Borough and the Town are aging more quickly than the national average.
- Migration – this showed a marginal net outward migration for the Borough in 2018, with the majority of outward migration of individuals being those of 15-19. The majority of inward migration was of individuals between 30-45 years of age. Approximately 45.7% of all house moves in 2011 occurred within the Borough, and 12% of movers stayed within the Ward they were already living in.
- Population – The population as a whole is projected to increase through to 2043 by approximately 18.6%. The child population, however, is generally set to reduce before stabilising and then starting to increase again. Within the period 2018-43 the child population is projected to have increased by just 3.5%. The different school cohorts show differing timescales, with increases in child numbers moving in waves through the system.

Child Yield and Cost

9.1 Hampshire County Council has a published methodology for seeking contributions “Developers’ Contributions towards Children’s Services Facilities” that is dated September 2019. This lays out the methodology currently in use by HCC. With education facilities now excluded from the Fareham Borough CIL Scheme, the HCC approach is the default methodology for the area.

9.2 The education structure in Hampshire is two-tier (primary and secondary schools) and Table 6 shows the number of pupils calculated per dwelling:

Pupil Yield	Pupil Product Ratio Per Dwelling
Early Years	0.09
Primary	0.30
Secondary	0.21
Sixth Form	0.06

Table 6: Pupil Product Ratios

9.3 HCC excludes one-bedroom dwellings from its calculations together with those intended solely for the elderly. Flats and apartments are assessed at the rates shown above. The calculation of pupils for this development at 125 dwellings, less 15 1-bed units is shown in Table 7.

School Phase	Dwellings (125 less 15 1-bed)	PPR	Pupil Yield from Development
Early Years	110	0.09	9.9
Primary	110	0.30	33.0
Secondary	110	0.21	23.1
Sixth Form	110	0.06	6.6

Table 7: Pupil Yield

9.4 HCC lists a range of different costs, dependent upon whether a new school is required or, if expansion, the scale of that expansion. In its request, HCC indicates that it is seeking contributions towards the following:

- an additional infant classroom - £430,275
- an additional junior classroom - £430,275 and,
- an additional secondary classroom - £754,860.

No sixth form places are sought, as post-16 education is provided outside of the secondary school system in Fareham.

9.5 A classroom is generally accepted to accommodate 30 pupils, which would produce a cost of £14,342.50 per primary pupil and £25,162 per secondary pupil. When compared to the DfE Scorecard costs for expansion work, weighted for Hampshire, the primary cost per place compares well to the Scorecard cost of approximately £15,418, but the secondary is very high (Scorecard = £18,311).

9.6 Beyond this, however, is the HCC request which seeks a full classroom (30 pupils) when less than 30 pupils are yielded by the development. In this case costs for 60 primary pupils are being sought when only 33 pupils are likely to arise. This brings the per pupil cost to £26,077, which is considered excessive. It appears that as the number of pupils calculated exceeds 15, the request issued seeks funding in terms of a whole classroom.

9.7 The request in is direct contravention of HCC's own published methodology which states (para 5.3) *"Where the number of pupils from a development is less than would require a classroom to be provided the contribution will be calculated on a pr-rata basis and contributions pooled together from other developments to provide an appropriate local education offer."* While the number of pupils yielded by the development exceeds half a classroom full, there is no apparent reason why pooling of any existing or future funding should not be considered, rather than this inflated request made.

9.8 By rounding up from a calculated 33.3 pupils to charging for 60 increases the pupil product ratio by 80% - or 26.7 pupils. This does not then adhere to DfE Guidance which states that *"Pupil yield factors should be based on up-to-date evidence from recent housing developments"*, as however up to date the initial figure may be (0.3 per dwelling), HCC has effectively increased it by 80% (0.54 pupils per dwelling in this case) and this renders it non-compliant with the Guidance.

9.9 For the secondary, again costs for 30 pupils are sought when 23.1 pupils are calculated - producing a per pupil cost of approximately £32,820. This is a PPR inflation of approximately 30%.

9.10 The request for contributions on a "rounded up" basis, cannot be considered CIL compliant either in terms of being *"fairly and reasonably related in*

scale and kind" (CIL Regulation 122-2(c)) as it results in funding being sought for far more places than the development yields. This therefore runs counter to both the CIL Regulations and also to the DfE Guidance on Securing Development Contributions for Education. HCC may well be using up-to-date pupil yields, but in rounding up to this extent those pupil yields have been effectively doubled, rendering the accuracy of the pupil yields null and void and the overall approach non-compliant, being no longer fairly and reasonably related in scale.

9.11 The HCC methodology does indicate that costs stated are indicative and that where separate infant and junior schools are involved, may increase. On this basis, the request for contributions to meet the cost of two primary and one secondary classroom should be challenged. Any charge should simply reflect the number of pupils calculated and a per place cost. The maximum calculation for this should be as follows:

- Primary (infant and junior) places - $33 \times \text{£}14,342 = \text{£}473,286$
- Secondary places (using Scorecard cost) - $23.1 \times \text{£}18,311 = \text{£}422,984$

9.12 It should be noted that, while an education authority should be aware of Allocated sites and is responsible for planning school provision using that information, this does not mean that the additional places are automatically funded. The DfE expects, where appropriate, for S106 or CIL funding to be sought and used in areas where new residential development will bring the need for additional places. However, as discussed in paragraph 2.8 above, where this is not possible, for example due to viability issues, an authority may seek Basic Need funding from the DfE.

Schools

10.1 In our assessments, we take into account all primary-age schools within a two-mile and secondary-age schools within a three-mile walking distance of the development. These are the distances prescribed, beyond which local authorities are required to fund transport where the nearest available school is further away. The actual measurement used, when the assessment about transport is made, is very precise, i.e. front-door to front-door. In advance of a detailed and fixed development layout, we have used the approximate distance from the nearest site boundary to make the assessment. Once the site has been completed some of these schools may not be eligible for some pupils. In addition, walking routes via foot and cycle paths have been included.

10.2 The Authority is required to make annual pupil forecasts to the Department for Education (DfE) on a year-of-age basis by 'school planning area' or group. In doing this it identifies each school in the group⁸ and its capacity. The forecasts cover the period for which birth data is available. Pupils covered by Section 106 agreements or likely to come forward from housing, which does not as yet have permission, may be included within the figures. For primary school age pupils, this runs to 2023-24 and for secondary 2025-26. These are known as the School Capacity ("SCAP") returns, and they form the basis on which the Government allocates its funding for additional school places that are its responsibility to provide.

Primary Schools

11.1 There are four primary-age schools within a two-mile walking distance of the proposed development, including a linked infant and junior school. Their locations are shown in Map 3. The measurements have been taken from the centre of the site. Once the development is complete it is possible that one or more of these schools will not fall within a two-mile distance on foot, due to the final position of access roads and footways.

⁸ Clusters (school planning areas) are determined by each authority, with no consistency necessarily with other forms of planning area or across different authorities.



Map 3: Primary schools within a two-mile walking distance

11.2 A catchment area system is in operation in this area and the site falls within the catchment of the Orchard Lea Infant and Junior Schools. While ideal, it is not essential that additional places arising from development are created within the catchment school(s).

11.3 The capacities and numbers on roll of the four schools are shown in Table 8.

School	Postcode	Distance	PA	CAP	PAN Yr R	PAN Yr 3	NoR	Yr R	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	Yr 6
Orchard Lea Inf	PO15 5BJ	0.77	8500016	180	60			169	60	49	60	0	0	0
Orchard Lea Jnr	PO15 5BJ	0.77	8500016	256		64		229	0	0	0	64	50	65
Uplands Pri	PO16 7QP	1.71	8500016	315	45	45		313	45	45	45	45	45	43
St Columba CEPS	PO15 6LL	1.25	8500016	210	30	30		147	28	20	23	21	18	23
Totals				961	135	139		858	133	114	128	130	113	107
Surplus								103	2	25	11	9	26	6
								89.3	98.5	84.4	94.8	93.5	81.3	95.7

Table 8: Primary Schools Number on Roll Jan 2020

NoR = Number of pupils on Roll, PAN = Published Admission Number, CAP = Capacity

11.4 The numbers on roll at January 2020 show that these schools had a surplus of approximately 103 places across the seven year-groups. The number of admissions over those year-groups has fluctuated from a low of 107 in 2013 (Yr 6) and a high of 133 in 2012 and 2019 (Yr 5 and R). The admissions for September 2019 (Yr R) indicate that the schools admitted almost fully. Offers for Year R for September 2020 for the schools are listed by HCC as 116, a reduction of 17 on 2019.

11.5 At this point there would be sufficient spaces to meet the needs of the proposed development (at 33 pupils), but not within every year group were the need to be evenly spread across the year groups.

11.6 The Orchard Lea Infant and Junior Schools have a few spare places but not consistently across all years. In September 2020 a total of 56 offers of places were made, four below its published admission number.

11.7 It is noted that St Columba CEPS currently has spare capacity for 63 pupils, which would be sufficient for the proposed development. It is a school which was categorised by Ofsted as "Inadequate" (the lowest a school may be graded). However, a new headteacher has been appointed and the school became an academy on 1 December 2019, and this may mean that pupils, who would previously have looked elsewhere, will now apply for places. Nonetheless, in September 2020 only 15 offers of admission were made, filling only half the places available in the admissions year group.

11.8 Uplands Primary School is a popular school, which is full, and in September could only admit pupils from within a radius of 0.65 miles, which would exclude the proposed development.

11.9 The four schools are grouped together for forecasting and planning purposes with seven other schools within the Town. The most recently published SCAP forecast for the group is shown in Table 9:

Year	Yr R	Yr1	Yr 2	Yr 3	Yr 4	Yr 5	Yr 6	Total
Spring 2019 Actual	391	412	415	392	409	388	413	2820
2019-20 F/c	368	392	415	411	392	402	383	2763
Spring 2020 Actual	399	399	404	408	392	408	389	2799
2020-21 F/c	421	369	394	405	410	390	406	2795
2021-22 F/c	419	426	376	386	409	410	391	2817
2022-23 F/c	409	425	436	366	395	413	417	2861
2023-24 F/c	421	411	433	424	372	402	418	2881
PAN	420	420	420	432	432	432	432	2967

Table 9: Fareham Central/East Primary – SCAP Forecast January 2020

11.10 The forecast shows that pupil numbers for this group are anticipated to rise by approximately 41 through to 2023-24. By that point a surplus of approximately 86 places is anticipated (2.9%). While this margin is sufficient to enable some operating surplus, it is unlikely to be sufficient to meet the needs of the whole development locally, and the conclusion is that a contribution towards additional places would not be unreasonable as things stand at present.

Secondary Schools

12.1 Map 4 shows the three secondary schools within a three-mile walk of the proposed development.



Map 4: Secondary School

12.2 The capacity data and numbers on roll at the schools are shown in Table 10:

School	Postcode	Distance	PA	CAP	PAN	NoR	Yr 7	Yr 8	Yr 9	Yr 10	Yr 11
Henry Cort Community College	PO15 6PH	1.5	8500048	1050	182	812	178	178	128	167	161
Fareham Academy	PO14 1JJ	2.39	8500047	944	180	811	187	165	175	163	121
Cams Hill School	PO16 8AH	2.86	8500047	1253	240	1190	265	240	233	231	221
Totals				3247	602	2813	630	583	536	561	503
Surplus						434	-28	19	66	41	99
Occupancy						86.6	104.7	96.8	89.0	93.2	83.6

Table 10: Secondary School Data Jan 2020, NoR = Number of pupils on Roll, PAN = Published Admission Number, Cap = Capacity

12.3 As at January 2020 the schools showed a 13.4% surplus of places when related to capacity across all year groups – a total of 434 pupils. However, it should be noted that majority of these places are available within the older age-groups – specifically Years 9, 10 and 11. In the admissions round of September 2019 (Yr 7) the Published Admission Number was exceeded by 28 pupils.

12.4 The schools are grouped with three others in the wider Fareham area for planning and forecasting purposes (incorporating two school planning areas), and the forecasts for the two groups are shown in Table 11:

Year	Yr 7	Yr 8	Yr 9	Yr 10	Yr 11	Total Roll
May 2019 Actual	1295	1220	1266	1191	1197	6169
2019-20 F/c	1324	1298	1224	1256	1179	6281
Spring 2020 Actual	1366	1301	1224	1246	1184	6321
2020-21 F/c	1288	1318	1305	1213	1243	6367
2021-22 F/c	1340	1291	1328	1302	1205	6466
2022-23 F/c	1377	1344	1302	1326	1296	6645
2023-24 F/c	1430	1377	1350	1296	1317	6770
2024-25 F/c	1395	1429	1382	1344	1285	6835
2025-26 F/c	1393	1390	1431	1372	1329	6915
Listed PAN / CAP	1465					7012

Table 11: SCAP forecasts Fareham West/North and Central/East Secondary - Spring 2020

12.5 The forecast indicates a rising roll through to 2025-26 at which point just 97 places will remain (1.3% of the total). Within the Fareham West/North Group which includes the catchment Henry Cort School, a deficit of 12 places is forecast by 2025-26.

12.6 The forecast as it is shown in Table 14 is likely to represent close to the peak of pupils, in line with the ONS Projections which show numbers of secondary

age children rising through to 2025. After this point, the natural increase in secondary-age children should slow down but is then likely to be replaced by the additional proposed housing.

12.7 On this basis of the current figures and forecasts, therefore, a contribution towards additional places is not be considered unreasonable. However, as commented previously, any contribution should represent proportionately the size and scale of the development and not be subject to “rounding up” to the extent sought by HCC.

Planning Application

13.1 It is noted that the proposed development at its current configuration is some 70 dwellings larger than the original application, and that the mix is, consequently, different, enabling the exclusion of a number of potential 1-bed dwellings. A comparison of the pupil product is shown in Table 12:

Application	Dwellings	Less 1-bed	Primary Pupils (0.3)	Secondary (0.21)
P/18/0067/OA	55	55	16.5	11.55
P/20/1168/OA	125	111	33.3	23.31
Difference	70	56	16.8	11.76

Table 12: Application impact comparison

13.2 In 2018, when the original application would have been assessed, there were fewer places available in the local primary schools (66 available in the closest four compared to the current 103, and 118 available in the planning area compared to the current 168). In addition, the primary forecasts indicated numbers would rise to 3,267 in the planning area, producing a deficit of approximately 333, whereas now pupil numbers are forecast to reach only 2,881 by 2023-24, leaving a surplus of 86.

13.3 In these circumstances, it is hard to understand why HCC did not seek a contribution towards additional primary places in 2018, while it is now seeking one. One possible conclusion is that pupil numbers calculated did not exceed half a classroom’s worth, whereas the higher dwelling number pushes each education phase over half a class. There is, however, nothing in the HCC methodology that indicates that this is part of its formal approach.

13.4 The situation with regards secondary is different, in that rolls and forecasts in 2018 indicated that sufficient space should be available, whereas now this is less likely.

13.5 Even so, the permission on the original application represented HCC's approach at the time and HCC clearly accepts that the original number of secondary pupils will be coming forward without benefit of a contribution.

13.6 Treating the new application as being in addition to the existing permission, it is calculated to only yield 16.8 primary and 11.76 secondary pupils in addition. It would not be unreasonable to provide a contribution for those pupils alone.

13.7 As such, it is recommended that HCC be engaged to review the request in terms of:

1. Addressing the rounded-up approach, which effectively increases the PPR and the requirement, and / or
2. Excluding the pupils from the original application.

Summary and Recommendations

14.1 Primary - Primary schools in the area currently have sufficient space to accommodate the pupils from this development, although most of the space exists within a school which is not the catchment school. It is questionable as to whether sufficient space will remain by the end of the forecasting period and it would not be unreasonable for a contribution towards places to be made at this stage.

14.2 Secondary - Secondary schools, similarly, currently have sufficient space at present to accommodate the yield from the full development but are unlikely to do so into the future. A contribution, again, would not be unreasonable.

14.3 However, both requests have been pitched in terms of rounding up to enable full classrooms to be created. This has the effect of nearly doubling the financial request made for primary and by 30% for secondary - which must render it non-CIL compliant in terms of being fairly and reasonably related in scale and kind, and non-compliant with DfE Guidance in terms of the adoption of up-to-date pupil product ratios.

14.4 In addition, if the new application is taken as being in addition to the existing permission, then only the additional pupils should be taken into account and a contribution made only for them.

14.5 It is recommended that HCC be engaged on this basis to seek a reduction in the level of contributions sought.
