



EARLY YEARS AND SCHOOL INFRASTRUCTURE PLAN

October 2014

**This Plan will be reviewed every 3 years, next review due
October 217.**

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Foreword

Welcome to Hartlepool's Education Infrastructure Plan, which sets out the Council's strategy for pupil place planning, schools capital investment and vision for education provision for the next ten years.

The purpose of the plan is to contribute to raising achievement through the provision of quality learning environments. The plan describes the range of planned activities that affect the number, type and location of schools in Hartlepool, as well as the condition and suitability of school buildings and ultimately the number of school places available at each.

Effective school place planning is about ensuring the right number of good schools, which are educationally and financially viable, of the right size and in the right locations. It is also about ensuring that school buildings are high quality and fit for purpose.

Hartlepool Borough Council's Schools Capital Programme, which includes grant funding from central government alongside other sources of funding, such as developer contributions, will be used to support the implementation of the plan.

Gill Alexander
Director of Child & Adult Services

Section One: Introduction, strategic and statutory context

1.1 Introduction

Hartlepool is located on the North East coast within the Tees Valley region. It is a compact, mostly urban authority, with a small number of hamlets or villages just outside the town. There are approximately 91,220 inhabitants. The Borough has seen a major transformation over the past 25 years through regeneration programmes and public and private sector investment. Hartlepool has become a successful, modern town equipped to meet the challenges of the 21st century.

Our focus is to create the learning environments which will help to equip our children and young people to do well at school, to make friends and to build strong relationships with their family. As young adults, we want every young person to have the knowledge, skills and qualifications that will give them the best chance of success, so that they are prepared to take their place in society as a happy, healthy, contributing and confident citizen.

Our vision is that Hartlepool will be a place where:

- All children and young people find their talents and experience good and inspirational teaching every day in a climate that expects the highest standards;
- The gap is closed between the achievement of children and young people from low income families and children in care and all children and young people nationally;
- Young people achieve the best qualifications possible, particularly in the globally important subjects of English, science, mathematics, technology, engineering and modern foreign languages, so that they can compete for the best jobs, best university places and high level apprenticeships;
- Children are supported from birth and throughout their childhood and adolescence by strong families and communities so that they start school with a zest for learning and grow up to have high expectations of themselves and their schools, and the optimism, confidence, values and resilience to succeed;
- Young people are prepared for life and work in an increasingly complex world and globally competitive economy.

Hartlepool has a total of 38 schools, including:

- 27 Primary Schools (all include nursery provision)
- 3 Secondary schools
- 1 Primary Special School
- 1 Pupil Referral Unit

- 6 Academy schools (2 Secondary, 3 Primary and 1 Secondary Special)
- X Foundation Schools
- X Voluntary aided schools.

The schools vary in size, from primary schools with fewer than 100 pupils to over 1500 pupils in our largest secondary school.

Taken together, the 38 schools in Hartlepool provide education for a total of 15,090 children.

For the majority of schools, pupil numbers are stable. However, some primary schools experience significant turnover in their rolls as a result of pupil mobility within the town.

1.2 Aims of the Early Years and School Infrastructure Plan

This document aims to provide an overview of current and future pupil numbers which supports planning the future pattern and provision of school places across the Borough of Hartlepool.

Pupil Place Planning (PPP) is a critical aspect of the Local Authority's statutory duty to assess the local need for school places to ensure that every child can be provided with a place in a state-funded school. Local Authorities (LAs) need to show that they have robust procedures and systems for forecasting pupil numbers and taking account of changes in local circumstances to ensure there will be the right number of schools in the right places for the number of pupils expected in the future.

In addition, the plan also aims to identify priorities and allocate spending for capital developments on a needs led basis. It will outline the criteria used to make decisions about future development of educational premises and to manage the demand for school places more effectively, and remove excessive surplus places in a focused manner.

The principal objectives are to improve standards of existing accommodation in order to meet the needs of pupils and teachers, facilitate implementation of the curriculum and contribute to raising standards.

We aim to provide:

- parents with an understanding of the range of educational offers available to suit their needs;
- schools with a clear understanding of how decisions are reached about pupil planning, estate maintenance processes (where applicable) and capital investment and where they fit in the decision-making process;
- Local Planning Authority and housing developers with an understanding of their role in supporting the future pattern of education provision best marketed

to changing demand;

- the wider community with an understanding of how education provision will be delivered to support the development of Hartlepool over the next 10 years.

1.3 Strategic Objectives

This Early Years and School Infrastructure Plan (EYSIP) sets out how we will work with key partners to shape education provision and how decisions about capital investment will be made more transparent to ensure maximum benefit and value for money. It will be relevant to all schools whatever their specific governance arrangements.

1.4 Strategic Context

National context

In July 2010 the government launched a comprehensive review of all capital investment funded by the Department for Education (DfE). This Review was called the James Review.

The purpose of the review was to consider the Department's existing capital expenditure approach (and in particular the Building Schools for the Future programme) and to make recommendations on future delivery models for capital investment, with a focus on achieving better value for money, higher quality, more rapid deployment, raise standards, tackle disadvantage, address building condition and meet the requirement for school places resulting from an increase in the birth rate.

The report sets out the research and analysis that was undertaken and also the recommendations on future delivery models for capital investment.

In December 2013, a progress report was published. The majority of recommendations were accepted by the Department for Education and in summary the following areas have been addressed:

- The Property Data Survey Programme (PDSP) has been initiated to collect condition data on the schools estate and a full dataset should be available by mid-2014, ahead of the Review's expectations.
- The SCAP (Schools Capacity) survey has been improved which allows a more granular assessment of the requirement for places.
- The concept of allocating capital to need has been embraced by the Department, and programmes such as the Priority School Building Programme have helped to address the most significant areas of need.

- The recommendation that information from the PDSP is used to make allocations from 2015-16, with some funding continuing to be allocated for continuing maintenance.
- PDSP should be maintained and updated on a 5 year rolling basis and accountability and feedback mechanisms should be put in place to ensure those who make sensible capital investments are not penalised.
- Finally, the report recommended the Department continues to work with local authorities to ensure SCAP data is collected in a way which best represents need and local circumstance and to move to a holistic (rather than bid-based) allocation system.

The Local context

Hartlepool is currently using policies from a Local Plan in 2006. These policies were “saved” by the Secretary of State in 2009 and form the Development Plan for the town. A new Local Plan, which had been successfully approved by a Planning Inspector, was withdrawn by the Council in late 2013. A new Local Plan is currently being prepared but is in the early stages.

Cancellation of Building Schools for the Future (BSF) Programme

Hartlepool was a Wave 5 authority in the BSF programme. As part of the programme requirements Hartlepool undertook a review of future demographic projections and identified a significant surplus places issue by the end of the BSF planning period. After several rounds of town-wide consultation and the publication of statutory proposals, Hartlepool’s Cabinet decided to close Brierton Community School with effect from Summer 2009. The impact of the closure of Brierton Community School meant that the remaining secondary schools took additional pupils to manage the process. A number of demountable buildings were installed on the remaining school sites to control the increased number of pupils, however, the plan was to rebuild all schools with increased capacity as part of the BSF programme.

In July 2010, the BSF programme was cancelled by central government. This left the secondary estate with one refurbished school under the BSF programme, and four secondary schools and one secondary special school oversubscribed and requiring significant capital investment. This is now an identified priority for the Local Authority.

Co-location of schools

Where appropriate and with consultation with all stakeholders co-location may be a possible solution to pupil place planning issues across the town. As part of the Primary Capital Programme (PCP) review in 2008/9, the possibility of co-locating St Cuthbert’s RC Primary School and St Aidan’s CE Primary School was identified as one of the priorities for future investment. Due to the cancellation of the programme this priority was put on hold.

Having reviewed the current school estate and considered the condition reports, work has begun on reviewing this option as part of future capital priorities.

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Priority School Building Programme (PSBP)

The PSBP is a national programme run by the Education Funding Agency (EFA), with the aim of rebuilding, remodelling those schools considered to be in the worst condition. Three Hartlepool schools have benefitted from this scheme as part of the first phase of the programme. In July 2014 Hartlepool submitted expressions of interest for other schools as part of Phase 2 of the programme. Local Authorities will be notified of successful submissions by the end of 2014.

The Local Authority is focussed on addressing any issues and identifying additional funding to ensure the provision of quality school places for our young people.

1.5 Statutory Context

The fundamental starting point for the EYSIP is to ensure that we can meet our statutory duties delivered through the early years and education estate. The EYSIP explains how we will meet our statutory responsibilities in:

- ensuring fair access to schools for every child and actively promoting a diverse supply of strong schools
- promoting high quality early years provision, securing free early education for all three and four year olds and for all disadvantaged two year olds
- ensuring there are sufficient children's centre services to meet local need and sufficient childcare for working parents
- supporting participation in education or training for young people.

1.6 Consultation and engagement arrangements

The changes in national policy and the complex nature of the strategic, local and statutory context highlight a number of key issues that need to be addressed. These are:

- residential developments planned over the next ten years;
- a school estate of varying age, size, condition and suitability which needs to be maintained against a backdrop of reduced capital funding and conflicting demands;
- the requirements and challenge of the National Planning Policy Framework in particular delivering sustainability and high quality designs against reduced capital investment.

As part of any changes to the education estate or new legislation, we will work and consult with partners on key issues.

Section Two – Principles for planning school places

Overview and challenges

In terms of currently not having an up-to-date Local Plan as described above has left the Council in a position where it cannot currently demonstrate a five year housing land supply and is therefore experiencing a high number of planning applications for new housing sites on greenfield land to the west of the urban area.

The current situation means that considered housing allocations which take account of key infrastructure needs such as the proximity and availability of schools are not being made. Instead, as planning applications for housing sites are coming in, the authority are having to individually assess each application to see if there is a need for the developer to pay an education contribution towards increasing the capacity of an existing school in the proximity of the site to cope with the new children from that development.

It is however likely that planning applications will be received for large sites (1500-2000 new homes) on land to the south west and west of the town. It will be necessary to assess the scale and impact of these sites and it may be necessary to ask developers either to provide a new primary school on site or to safeguard land for a school in the future and make a financial contribution towards the build costs if it is needed.

In the current economic climate there is much uncertainty over the level of future capital funding from Government, and an expectation from Government that increased numbers can be managed without significant investment, balanced against the continued pressure on schools to improve standards.

In addition, the Local Authority recognises its changing role with the development of academies and other providers, and is committed to working with all educational establishments to ensure choice, diversity and excellence for parents and our young people.

Principles of Place Planning

It is important that there is a set of core principles in place that provide a robust basis for pupil place planning in an open and transparent process and that investment decisions are based on these principles, established in partnership with others responsible for delivering education in Hartlepool.

The principles are summarised below;

- provide local schools for local children
- provide parents and children with choice, diversity and excellence

- maintain a network of provision across Hartlepool by ensuring that no primary school will be smaller than single form entry or larger than two form entry and ensuring that no secondary school will be larger than 1250 places.

The Overall Approach

Our approach to education provision in Hartlepool needs to respond to the capacity demands arising from local communities, where pressures may result from increasing births, and the needs generated by new developments. However, we recognise that education provision is not solely about capacity and numbers and has a key role in promoting choice, quality and diversity in the range of education provision available. We will work with key partners to ensure that when new provision is needed due to a shortfall of pupil places any expansion plans represent value for money, are sensible and delivered in a timely manner to meet the statutory need.

Wherever possible, published admissions numbers are set to multiples of half a form entry. A standard form of entry is 30 places therefore most intakes are in multiples of 15. This is not always possible given the restrictions of the physical space available within schools.

Early Years & Childcare Statutory Duties

Hartlepool has been delivering two year old places for the past five years to the most vulnerable two year old children. The statutory duty to deliver two year old places commenced on the 1st September 2013 however Hartlepool Borough Council began to place children using the new funding from the 1st April 2013. In 2013/14 eligible children were from the 20% most income deprived families – this was estimated to be approximately 400 eligible children in Hartlepool using this criteria. In 2014/15 eligibility will be extended to the 40% most vulnerable families. This includes those families that are working but on a low income, children in foster care, children looked after, children under special guardianship, adopted children, children with additional needs bringing the total estimated number of eligible two year old places in Hartlepool to 694. Places must be allocated to eligible two year old children the term *after* their second birthday. Discretion remains with the LA to fund a childcare place outside this criteria. The process of managing the childcare market is a difficult one not least because the LA does not control the private, voluntary and independent (PV) sector that provides the majority of childcare in the town. The childcare sufficiency assessment report therefore provides the LA with essential detail on the supply of childcare in Hartlepool and makes clear any actions the LA needs to take to effectively manage the market.

In addition to the existing five schools taking two year old children (West View, Rossmere, St John Vianney RC, Grange and Golden Flatts Primary Schools) two of these schools are looking to expand their provision. A further seven schools are working with the LA to develop provision (Owton Manor, Stranton, Barnard Grove, Brougham, Greatham, Lynnfield and St Aidans C of E primary schools).

Areas where we have high numbers of two year old childcare places will need to be monitored and where they begin to reach capacity, the opportunity to increase their provision will need to be explored.

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Three and Four Year Old Free Nursery Entitlement (FNE)

Every eligible 3 or 4 year old child has access to 570 hours of FNE across the year in either a maintained or approved setting. Children are eligible for a place the term *after* their third birthday. In October 2013 15 schools were fully flexible in delivering their FNE and 9 offered flexi sessions where parents can adjust their nursery care to suit their family needs.

Clearly the government's new offer of a free place to every eligible two year old child will result in a need for some new places. The LA continues to carefully manage this process ensuring that existing providers are not adversely affected whilst at the same time meeting the needs of eligible parents.

The governments Welfare reform agenda could mean that more two year old children in Hartlepool may become eligible for a free FNE place on the basis of their families income.

Providing places for 5 to 16 year olds

Primary school provision offers places on a single site for children aged 5 – 11. There are no separate infant and junior schools in Hartlepool. All primary schools provide nursery provision on site.

There are three local authority secondary schools and two academy secondary schools in Hartlepool. Hartlepool secondary schools operate a 'partner primary school' system for its schools. This means that each primary school has a feeder link to a designated secondary school. This link is for the purposes of oversubscription criteria and parents still have the right to express a preference for the school of their choice.

In the event that there are more applications for the secondary school than there are places available, priority is given to those pupils attending a linked partner primary school and living in the admission zone of that primary school.

The English Martyrs School & Sixth Form College also operates a feeder link system however, when considering applications, the governing body of the school give priority to baptised Roman Catholic children attending a feeder primary school (one of the Catholic primary schools).

List of primary schools and their linked secondary school:

Dyke House Sports & Technology College

Brougham Primary

Holy Trinity C of E (Aided) Primary

Jesmond Gardens Primary (*partnered with Dyke House Sports & Technology College and, in part, High Tunstall College of Science (certain streets only are partnered with High Tunstall College of Science)*).

Lynnfield Primary (*partnered with both Dyke House Sports & Technology College and High Tunstall College of Science*)

St Aidan's CE Memorial (Aided) Primary

Stranton Primary

Ward Jackson C of E (VA) Primary

The English Martyrs School & Sixth Form College

Sacred Heart RC Primary

St Bega's RC Primary

St Cuthbert's RC Primary

St John Vianney RC Primary

St Joseph's RC Primary

St Teresa's RC Primary

High Tunstall College of Science

Eldon Grove Primary

Hart Primary

Jesmond Gardens Primary (*partnered with Dyke House Sports & Technology College and, in part, High Tunstall College of Science (certain streets only are partnered with High Tunstall College of Science)*)

Lynnfield Primary (*partnered with both Dyke House Sports & Technology College and High Tunstall College of Science*)

Rift House Primary

St Peter's Elwick C of E (VA) Primary

Throston Primary (*partnered with both High Tunstall College of Science and St Hild's Church of England VA School*)

West Park Primary

Manor College of Technology

Eskdale Academy

Fens Primary

Golden Flatts Primary

Grange Primary

Greatham C of E Primary

Kingsley Primary
Rossmere Primary

St Hild's Church of England VA School

Barnard Grove Primary
Clavering Primary
St Helen's Primary
Throston Primary (*partnered with both High Tunstall College of Science and St Hild's Church of England VA School*)
West View Primary

There are school admissions policies in place for all community, voluntary controlled, voluntary aided, foundation and academy schools. Each school has an admission number which must take account of the indicative admission limit which results from the national net capacity formula. Admission authorities are represented on the Hartlepool Admissions Forum which has responsibility to:

- monitor how admissions relate to published admission numbers;
- promote agreement on how to ensure that vulnerable children and those with special needs are effectively provided for in admission arrangements;
- consider and monitor arrangements for the allocation of places outside the normal admission round and arrangements for those excluded from school.

SEN Provision

Other educational provision in Hartlepool includes two special schools (one primary and one secondary) and a pupil referral unit.

The LA's strategic vision for inclusive education reads:

"Hartlepool council believes that all children should have an equal opportunity to have access to a broad and balanced curriculum and to be included in all activities at school that are open to pupils of their age group. The Council aims to secure this equal opportunity for every child by promoting and supporting the development of an inclusive education within mainstream schools and by ensuring that ultimately every child is able to access a mainstream school and receive appropriate support in respect of any special educational needs they have. The needs of individual children will remain paramount and Hartlepool special schools will form part of the provision both in relation to individual children and in supporting role to mainstream schools."

The Action Plan for children and young people with learning difficulties and/or disabilities (LDD) 2013-15 outlines the strategic priorities in this area.

Post 16 provision

Post 16 provision in Hartlepool consists of a College of Further Education, a Sixth Form College, a Roman Catholic Academy with a Sixth Form College, an Academy with a Sixth Form College, a specialist College of Art and Design and several local and national training providers. There is a diverse mix of voluntary and community providers who support the re-engagement of 'Not in Education, Employment or Training' (NEET) learners to post 16 learning via community based ESF projects. There are also post 16 providers within travel to work distances, including East Durham and Houghall College, who provide specialist agriculture and horticulture provision.

Travel plans

Under the previous government there was a programme in place for all schools in the country to develop a School Travel Plan. A School Travel Plan is a blueprint for schools to put a range of measures in place to encourage the use of active and sustainable modes of transport for school journeys and all schools in Hartlepool had their plans in place by 2009.

Walking and cycling ARE great ways for pupils to get to school as they can help reduce congestion around schools, making the school run less stressful and far safer for everyone. In addition, many teachers report that young people who walk and cycle to school are more alert and ready to learn than those who arrive by car. Walking and cycling are great forms of exercise for children and adults alike and can help improve our local environment.

In conjunction with national charity Living Streets, Hartlepool Borough Council has been working to promote walking to school through schemes such as WoW (Walk once a Week) which rewards pupils for walking to school. The project also encourages measures that can still bring health benefits and keep areas around schools safer such as Park & Stride - parking away from the school and walking the last 5-10 minutes of the journey.

A number of primary and secondary schools in the town have cycle parking facilities and Level 2 Bikeability Cycle Training is offered to Y6 pupils at all primary schools. Bikeability is Cycle Proficiency for the 21st Century and aims to provide pupils with the skills, knowledge and confidence to cycle around town safely.

More recently, the Local Authority has assisted three schools in the town to produce new School Travel Plans, as part of the planning process relating to their redevelopment.

Surplus Places

It is important to be realistic about surplus places. A certain level is necessary to provide some flexibility within the system and allow for expression of parental preference. Whilst the town as a whole has sufficient surplus places there are areas where primary schools are at/nearing capacity.

The Authority aims to maintain the level of surplus places at 7%. The recognised guideline is that surplus places should not exceed 10%. If any individual school has surplus capacity of 15% or over, this should trigger an appraisal and, if necessary, action to address the surplus. There may be legitimate reasons for a continuing surplus at a particular school or, in the case of a small school, where the use of a percentage clearly overstates the problem.

It may be necessary to consider the reduction of places across a group of schools serving a particular area. In drawing up any future rationalisation or reorganisation proposals, the LA would work in partnership with others, particularly school governors and the diocesan authorities. The following factors would need to be given particular consideration:

- **educational standards** as judged by, for example key stage tests, examination results, OfSTED inspection reports, and the LA's own monitoring of school performance;
- **the quality of accommodation** as assessed in condition and suitability assessments carried out as part of the Asset Management Plan process;
- **the location of schools** in relation to others, and in particular the effect on travelling distances for pupils;
- **the capacities of schools (sufficiency)** in relation to the expected demand for places;
- **community involvement** with schools, i.e. the extent to which a school provides a base for community activities/services, such as early year's provision or adult education.

Strategies for removing Surplus Places

Against the current background of increasing birth rates and school roll numbers it is not expected that the Local Authority will have to take action to remove surplus places in any schools. In addition, the DfE have reduced the emphasis on removing surplus places at schools and have stopped monitoring this. However, where a locally maintained school has significant surplus places ie more than 25%, consideration may be given to removing provision.

Proposals to remove surplus places will be considered in the following cases:

- The amount of surplus in a school is significant i.e. more than 25% and there are other local schools with places High levels of surplus or under subscription have been consistent and there is evidence that pupil numbers will not improve or will decline further.
- The school's pupil numbers have fallen to the point where it is no longer viable to maintain it.

- Reduction of places could be temporary or permanent. Where the problem is specific to one school and there are no implications for other schools in the locality, the council will seek to reduce the school's capacity and admissions number by finding other uses for the unused school accommodation. This might include re-designating space for alternative uses e.g. community facilities or office space for co-located services, or re-using space for specific educational purposes such as for children with special educational needs.
- Temporary accommodation will be removed as a matter of course and, where there is a projected sustained decrease in pupil numbers consideration could be given to removing permanent accommodation.

Where the over provision of school places affects several schools, the council will seek an area-wide solution. This could involve several schools being reorganised with the possibility of one or more schools closing. Options to achieve such reorganisations are expected to be limited as more schools seek autonomy from the council. In the current climate, set against a background of increasing pupil numbers, it is unlikely that such measures would be considered unless at least one school has become so small that it is difficult to maintain provision.

In some instances there may be situations where the provision of school places needs to be managed in a locality but a reorganisation of schools is not necessary, desirable or achievable. Consideration may be given to encouraging schools to collaborate more closely with one another or to federate.

Such arrangements can allow small schools to benefit from the scale of operation of a larger school, while maintaining the advantages of local provision. Schools can also share staff and expertise and may be able to resolve some accommodation issues by taking such measures.

Adding School Places

The Department for Education and Skills defines a 'basic need' for additional places as the requirement for additional school places in areas of population growth, where there is no more capacity in all maintained schools in the surrounding area. A growth area is one where there is a demand for places, having taken account of the available alternative school places within a 2 mile radius of the site of a proposed new building for a primary school and within a three mile radius for a secondary school. Denominational need and the provision of additional places at successful and popular schools does not constitute a 'basic need', where there are sufficient numbers overall.

If there is a 'basic need' to add school places, short of opening a new school, the Authority will need to consider the same key factors as set out above for the removal of school places. Where there is a requirement for additional places, it may be an opportunity to expand a popular over-subscribed school, if this is feasible. Where appropriate, the LA would also consider inviting other potential providers to bring forward proposals for a new school where this is required to replace a secondary school.

Where it is identified that additional places are required the Local Authority will consider three levels of intervention as follows.

1. The Local Authority will try to determine, in discussions with the school/schools, if there is already unused or underused spaces available. The council will look to see if a school's admission number can be increased without any additional investment by utilising the building better or by converting community or resources spaces to classrooms. In some cases this may only be a short-term solution and further capital investment may need to follow.
2. Where pressure for places is projected to be sustained and there is no alternative accommodation which could be easily converted The council will seek to permanently increase capacity at one or more schools by adding in permanent additional classrooms and facilities. A major consideration will be the availability of sufficient land on the existing school site(s).
3. Where pressure for places is projected to be sustained and there is no option to increase capacity within existing schools, consideration will be given to establishing a new school or establishing an additional school site for existing school. In accordance with current legislation it is likely that a new school would mean seeking a new academy or free school. A major consideration would be the availability of a suitable site.

Overcrowding in Schools

Failure to address overcrowding could lead to large class sizes, loss of specialist facilities, or parents becoming dissatisfied because their children cannot get into their preferred school, or possibly their nearest school. Building new schools is one way of adding capacity when large increases in local demand justify it. It is more common for LAs to extend existing schools to provide additional forms of entry.

Section Three - Pupil Place Planning

Overview

Current legislation gives local authorities responsibilities for:

- Promoting high standards
- Fulfilment of potential
- Fair access to education
- Securing sufficient school places and increasing opportunities for parental choice.

The statutory responsibility to ensure a sufficient supply of pupil places requires a strong approach to collecting, assessing and using a range of data to inform a robust approach to future pupil place planning.

To meet our statutory duty, we not only have to plan for September intake to September intake changes in numbers, but also consider medium and long term needs which have to be addressed having regard to long term demographic changes and planned new housing development.

The response to these patterns of change involves an ongoing need to review and revise the capacity of existing schools where there are specific pressures for change.

Forecasting Primary and Secondary Pupil Numbers

1. Pupil projections are based on relevant data provided from a range of sources:
 - Department for Work and Pensions Child Benefit records.
 - Data from GP patient lists (pre-school age children and estimate births for current year).
 - Office for National Statistics sub-national population projections
 - Termly School Census (January headcount).
 - Primary School patterns of transition to secondary schools.
 - Housing data on new build developments and demolition programmes.
 - Staying on rate at Post-16.
2. The first stage of the projection process is to determine a target figure for the Local Authority as a whole for each school year group. An average of the last three years cohort ratios is used to roll forward the actual rolls. The ratio, calculated by dividing the 2014 Year 9 total by the 2013 Year 8 figure, for example, represents change in the cohort – most of which is migration. For Reception year the relevant cohort for births (5 years earlier) are used. These targets form the overall controls for the individual schools.
3. Future births are derived from ONS sub-national population projections released by the Office for National Statistics in May 2014 and revised on an annual basis. Local projections are modelled on national projections for migration and fertility rates and adjusted for local differences.
4. Reception pupils for the next academic year are estimated using the latest information on allocations and appeals at the time the projections are published. These are used as a proxy for the rolls in spring of the same school year. Reception pupils for subsequent years are an average of previous year's reception, year 1 and year 2 with an adjustment for any new housing or clearances in the schools catchment area. Other data such as GP Patient records are used to help estimate numbers coming into reception for smaller and rural schools.
5. All other year groups are rolled forward and then adjusted for housing developments/clearances and migration.
6. For every 100 new houses it is expected, on average, to produce around 2.5 children per year group. This is based on the Local Authority as a whole; an adjustment is made for individual schools where there is strong evidence of a higher factor. Current roles for Catholic and Non-Catholic pupils are used to split the pupils per house and current figures suggest around 19% of pupils will be Catholic.
7. Forecasting secondary school pupils is carried out shortly after forecasting primary numbers. Primary numbers feed through to the secondary phase, so our current projections have the advantage that seven year groups are already in the school system.

8. The basic technique for forecasting secondary pupil numbers is to project forward the numbers of children transferring to secondary schools from specific primary schools each year. These forward projections are then adjusted to include other important factors such as housing developments/clearances and migration.
9. Hartlepool uses Primary feeder schools to determine the Year 7 intake so the intakes vary according to the numbers in each year in the feeder schools. For the first year of the projections, figures for Year 7 are provided by the admissions team after all appeals have been concluded.
10. For schools with a 6th form, Year 12 and 13 are calculated using previous staying on rates.
11. For every 100 new houses it is expected, on average, to generate around 2.5 children per year group for secondary schools. This is based on data for the Local Authority as a whole; an adjustment is made where there is strong evidence of a higher factor. Current rolls for Catholic and Non-Catholic pupils are used to split the pupils per house and current figures suggest that 20% of pupils will be Catholic.

Expected House Building

Education infrastructure is an integral part of a new residential development and is essential in order to achieve sustainable communities. Developments that are likely to generate an increased demand for school places will need to contribute towards expanding existing education facilities where the development is not of a sufficient size to require a new school. This will include contributions and/or the allocation of land to enable schools to be built or extended. Paragraph 72 of the National Planning Policy Framework (NPPF) identifies the importance in ensuring sufficient choice of school places is available to meet the needs of existing and new communities and requires local planning authorities (LPA's) to take a proactive, positive and collaborative approach to meet this requirement, and development that will widen choice in education. The LPA should also give great weight to the need to create, expand or alter schools and work with school promoters to identify and resolve key planning issues before planning applications are submitted. Contributions are currently being required through saved Policy GEP9 (Developer Contribution) in the 2006 local plan and through guidance set out within the emerging Developer Contributions Supplementary Planning Document.

For developments of 750 dwellings or more a primary school will normally be required on-site, subject to spare capacity in local schools. In cases where a school is to be provided on site, the developer will be expected to set aside sufficient land and to construct educational facilities to the Local Authority's design and specification at the developers' own costs. In certain circumstances, if the developer can illustrate that the construction of the school cannot be justified in viability terms, the Local Authority may be willing to accept a parcel of land on site which would be

used to construct new education facilities with a financial contribution to assist with construction costs.

Contributions will be sought for developments where the Council has identified that there is pressure on school places in the area. These contributions may be discounted if sufficient places are available in existing local schools. When looking at spare capacity the Local Authority will also take into account other developments in the vicinity, and information on projected future pupil numbers. Under planning law these contributions are secured through section 106 legal agreement and must meet the tests set out in paragraph 204 of the NPPF. One of the tests states that contributions must be directly related to the development and as such it will be necessary within the legal agreement to identify which school the contribution will be invested.

The following types of residential development will be exempt from education obligations; sheltered housing, student accommodation, care homes and residential homes for the elderly.

Improving the Quality and Suitability of the Estate

We recognise that schools need to be of a sufficient size to offer a broad and balanced curriculum in a cost-effective manner.

Small Schools

The Audit Commission defines a primary school with under 90 pupils as a small school. The cost per pupil of maintaining a small school is inevitably much higher than in the case with a larger school. On the other hand, small schools can be very successful and there is no reason why such schools should not continue to flourish. Nevertheless, given the additional expense involved, small schools need always to be kept under particular scrutiny. The same point applies in the case of 11-16 secondary schools, once the school provides for less than five forms of entry.

School organisation proposals should not be based on an assumption that primary school classes should routinely be above 30 and must have regard to the legal requirement to ensure infant class sizes are not over 30. At secondary level, planning for many practical activities will also need to assume teaching groups of considerably fewer than 30.

Large Schools

Hartlepool Borough Council's Policy is that a primary school is not bigger than a two form entry and a secondary school is not bigger than 1250 places.

Primary Schools

The Council's strategy on primary school place planning is that no new school will be smaller than one form entry or larger than two form entry. The accepted reasonable level of surplus school places is 7%. Hartlepool's surplus is currently 11.5%, this is expected to reduce to 8.5% by 2017 but recover to 12.4% by 2023.

As a result of previous increases in birth rates, it is projected that Hartlepool primary school rolls will continue to increase until 2017. However, 2013 live birth data from the Office for National Statistics shows a 4.3% reduction in the national birth rate and it is expected that this will result in decreasing pupil numbers; revised projections suggest that Hartlepool will have approximately 108 less pupils in 2024 than in 2014. The General Fertility Rate (GFR) for England is 62.4 compared to 58.9 for Hartlepool.

The graph below shows projected primary age pupil numbers for the next ten years.

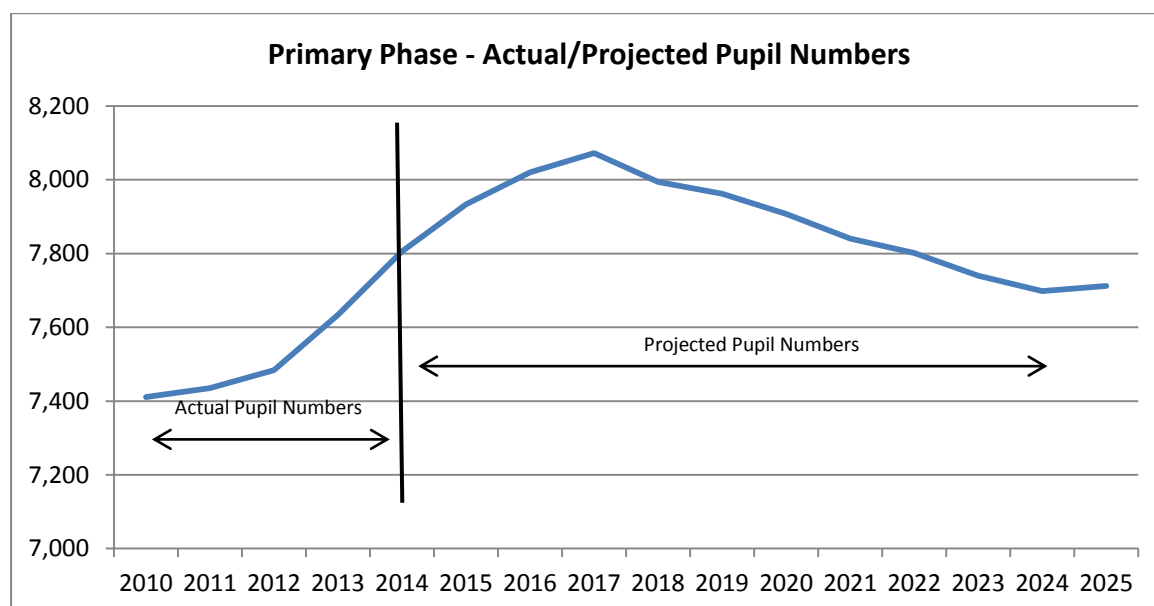


Figure 1

Whilst surplus capacity is at an acceptable level for the town as a whole, the graph below shows how this varies across schools. Four schools are currently full with pupils admitted above the published admission number and a further six schools have a surplus below the acceptable level. At the extreme, 3 schools have over 25% surplus.

As some schools are already full this is limiting parental preference. This can be seen in more detail in Appendix A.

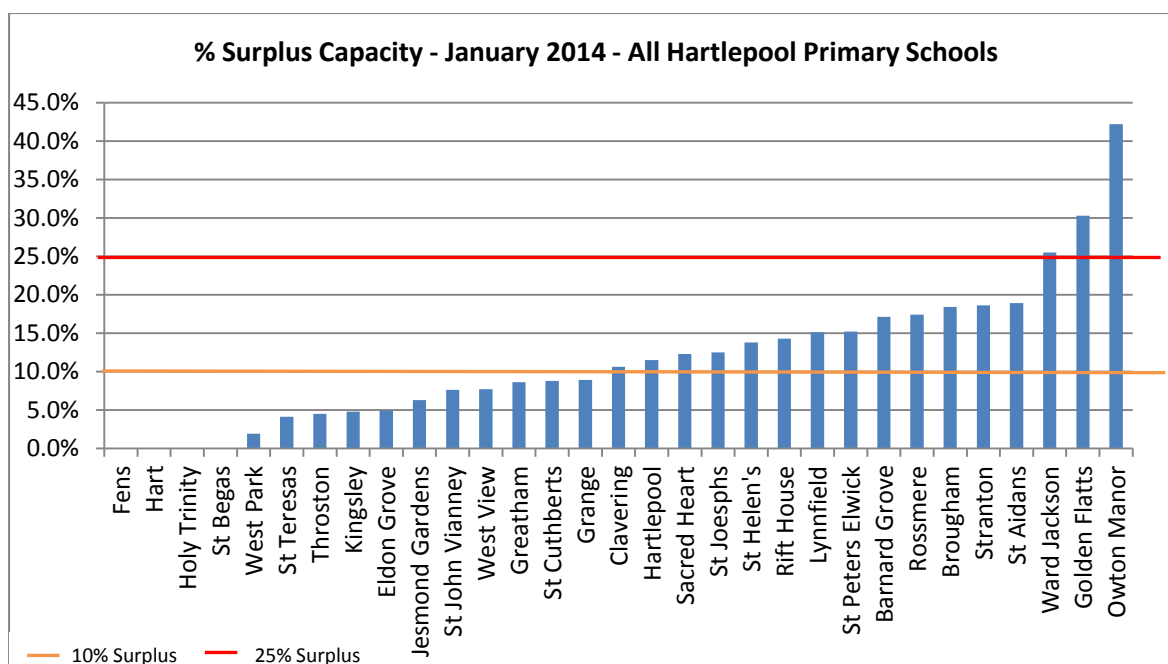


Figure 2

The following table shows overall surplus in each year group and highlights that the earlier year groups (Reception to Year 3) have less surplus places available. This is not obvious when looking at overall surplus of each school but is important to consider when assessing availability of school places.

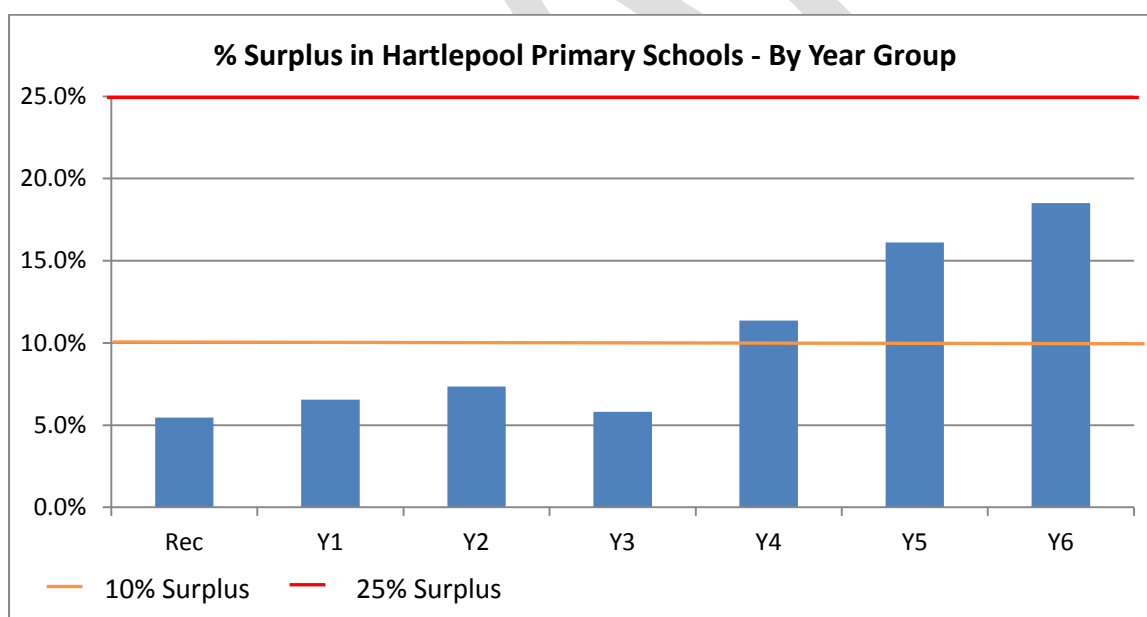


Figure 3

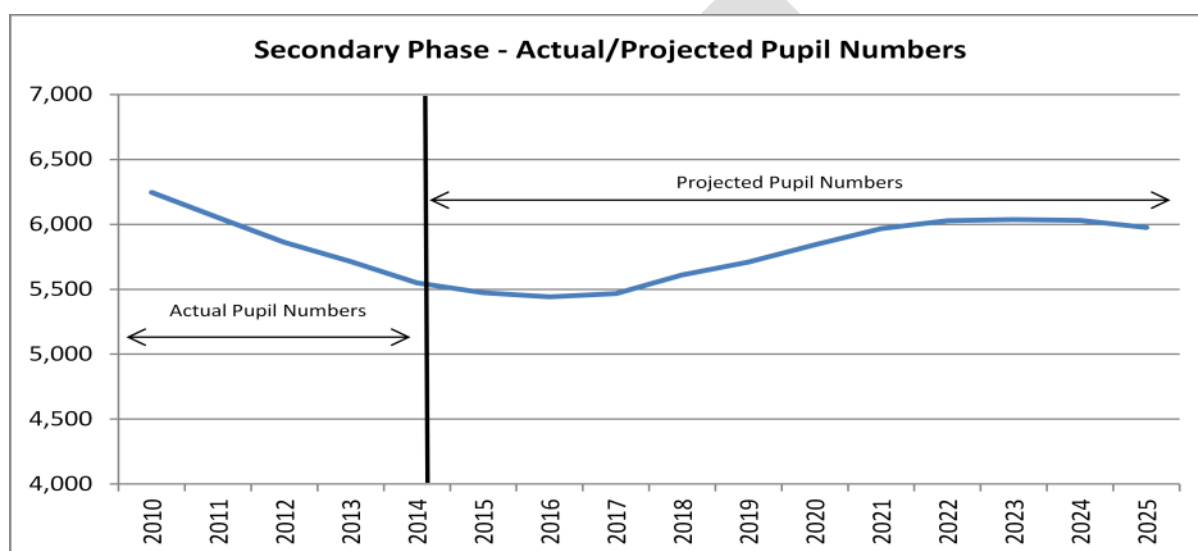
Secondary Schools

The Council's strategy on secondary school place planning is that no new school will be larger than 1250 places. Hartlepool's secondary schools currently have an acceptable surplus of 11.9%. This is projected to increase over the next 3 years and then decrease each year. Surplus capacity in secondary schools is expected to

decrease to 4.3% by 2022 and remain at a similar level for the remainder of the projection period.

Births in the area feed through to primary school entry five years later and to secondary school entry 11 years later. There is a strong correlation between births and numbers entering school for both sectors. Secondary schools are in a period of declining numbers and this is expected to continue for the next two years as the smaller cohorts of the late 1990s/early 2000s feed through. These will then be replaced by larger cohorts and numbers are expected to increase slowly initially, and then by around 100 per annum from Spring 2018 until Spring 2021 when numbers should level off at around 5,700.

The following table shows the projected pupil numbers for the next ten years.



Surplus capacity is not equally spread across all Hartlepool secondary schools. There are currently three schools with surplus capacity below the preferred level and two that are well above. This can be seen in the graph below.

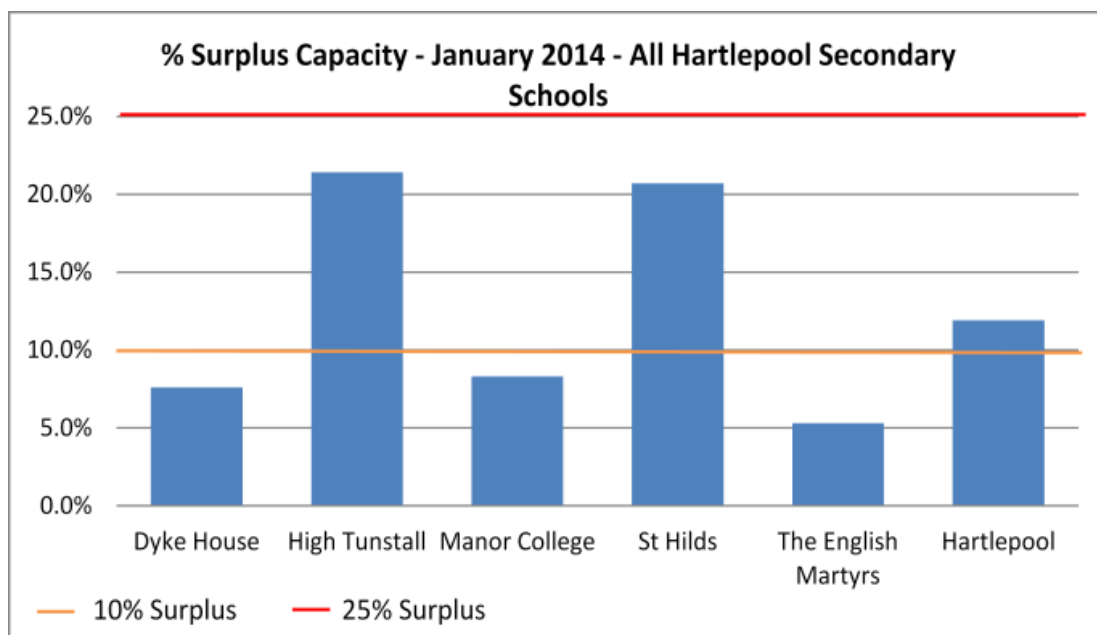


Figure 3

In the secondary sector the higher year groups have less surplus capacity. Over the next 2-3 years these larger year groups will leave secondary education, therefore, increasing the surplus capacity available. However, larger primary year groups will progress to secondary education from 2017-18 and the surplus capacity will reduce each year.

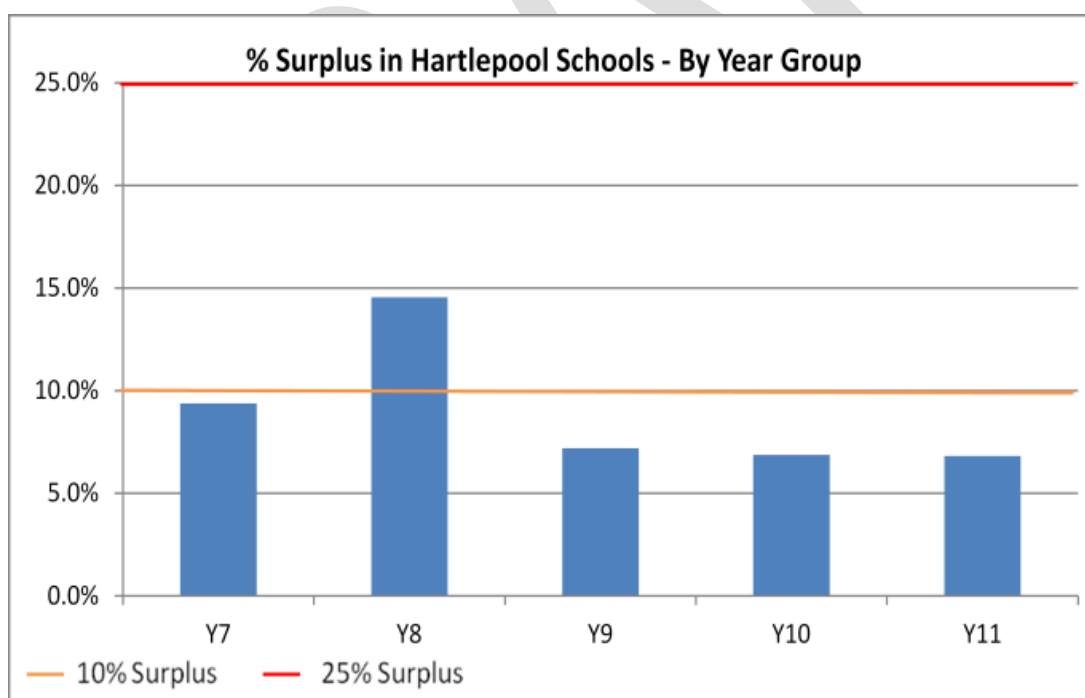


Figure 4

Post 16 provision

Following the implementation of the Raising of the Participation age young people must now stay in learning until they reach the age of 17, this will rise to 18 from

2015. The anticipated increased number of learners will not have any impact on providers of post 16 education in Hartlepool.

Planning Areas

The Authority has defined three educational planning areas to support school place planning. Each planning area comprises several primary schools and one/two secondary schools; schools are grouped based on geographical location. The planning areas are:

- North West (10 primary phase and two secondary phase)
- Central & East (14 primary phase and two secondary phase)
- South West (6 primary phase and 1 secondary phase)

The use of planning areas enables the Authority to identify school place pressures that would be hidden when looking at the town as a whole. In particular, there are significant developments proposed to the South West and North West of Hartlepool and these developments impact on school places in these areas.

Appendix ?? provides a summary of the school planning areas including which schools are in the area, pupil projections for the next ten years and surplus places by year group.

	Priority (Description)	Timescale
	Review available capacity in each planning area	Annually
	Monitor the impact of housing developments in the Northwest & Southwest planning areas	TBC
	Seek developer contributions from new housing developments where capacity issues are evident	

Section Four – Improving the Quality and Suitability of the Estate

Principles

Investing in the estate is much more than just about the maintenance of the bricks and mortar, it will contribute to the health and wellbeing of pupils and staff, support education performance, reduce running costs and the carbon impact of our buildings.

The principles which underpin our investment strategy are:

- The health and safety of children, staff and other school users will be the highest priority for capital investment;
- Ensuring schools stay open and are fit for purpose by prioritising maintenance to minimise the risk of possible closure;
- Investment decision
- Opportunities to support wider strategic projects will be taken where there is clear evidence the investment should be prioritised.

Our Approach

In the past, the approach to funding infrastructure has been based on an objective assessment against consistently applied criteria. The condition of premises (schools and children's centres) have been assessed, priorities allocated according to the seriousness of the condition revealed (below) and the urgency associated with any breaches of legislation.

Having identified where specific concerns about condition and health and safety issues, a matrix for the prioritisation of condition works has been developed. We also took into account the schools ability to accommodate work. For a number of years, capital funding from the Department for Education has been allocated using weighted pupil numbers across the town. However, 2015/16 capital funding is expected to be allocated by analysing data from the national Property Data Survey Programme.

Two schools, (Dyke House Academy and Jesmond Gardens Primary School) have already received significant capital investment through Building Schools for the Future and Primary Capital Programme. However, there are condition issues in other schools. The current condition backlog for our schools is circa £18m. The backlog includes, roofing and window replacements, mechanical and electrical works.

The capital priorities in the future will be to seek funding opportunities for new schools at High Tunstall College, English Martyrs School & Sixth Form College and West View Primary School KS2 Building.

Property Data Survey Programme (PDSP) – Overview

The PDSP has been undertaken by the Education Funding Agency (EFA), an executive agency of the Department for Education, to provide a consistent view of the condition of England's school estate. The PDS information will be used by the Department for Education later in the year (2014) to help target future capital investment to identify where school building condition needs are greatest and to help to shape future capital allocations.

A total of 12 common building elements (eg roofs, floors/stairs, ceilings, electrical services etc) are visually assessed and attributed a condition grade and priority rating.

Grade A – Good. Performing as intended and operating efficiently.

Grade B – Satisfactory. Performing as intended but exhibiting minor deterioration.

Grade C – Poor. Exhibiting major defects and/or not operating as intended.

Grade D – Bad. Life expired and/or serious risk of imminent failure

When the condition of elements have been assessed, priorities will be allocated according to the seriousness of the condition revealed (below)

Priority 1. Immediate or year 1 remedial action required.

Priority 2. Year 1-2 remedial action required.

Priority 3. Year 3-5 remedial action required.

While the government has commissioned these surveys, the Education Funding Agency has confirmed that local surveys should continue to be carried out. For maintained schools it is proposed that there will be an ongoing regime of tri-annual condition assessments, and it is advised that academies continue to keep accurate condition data as it will continue to be a key driver for future capital investment.

Responsibility for the day to day repairs and maintenance rests with the individual Governing Body or Academy Trust and it is good practice for schools to develop their own plan for tackling building related issues and schools will also need to consider making provision in their balances against contingent or emergency items.

Suitability Assessment

Schools Forum has agreed to top slice the Dedicated Schools Grant revenue funding to address suitability issues in schools. The first priority is to ensure all schools are 'wind and water tight' which will be addressed through condition data and then look at the curriculum and how this can be supported. For primary schools the curriculum priorities are cooking areas at KS2 and science laboratories in secondary schools.

Suitability is defined as how well school premises meet the needs of pupils, teachers and other users and contribute towards educational standards. Surveys assess whether teaching and non-teaching accommodation is 'fit for purpose'.

Surveys were last carried out during 2008 with the intention of informing the Primary Capital Programme. Surveys and data returns are no longer a statutory requirement, however, it is proposed to re-visit this area of work during 2014 to inform decisions on spending priorities. Assessments will be carried out jointly with a nominated colleague from each school and an officer from the Local Authority and will help identify the need for work to address issues which represent the greatest impact on the schools ability to raise educational standards. The following categories will form the basis of criteria to be used:

Category A – Unable to teach curriculum

Category B – Teaching methods inhibited

Category C – Management of organisation of school affected adversely

Category D – Pupil or staff morale or pupil behaviour affected adversely

Assessments will also identify health & safety/security problems arising from inadequate or unsatisfactory aspects of building or site layouts. This work will be overseen by the Schools Capital Sub Group

Key Priorities: Section 4

	Priority (Description)	Timescale
	Seek funding opportunities for new school High Tunstall	
	Seek funding opportunities for new school English Martyrs	
	Seek funding opportunities for new school West View	
	Improve science provision in Secondary sector	

Section Five – Funding

We currently receive an element of funding direct from central government, but there is considerable uncertainty about the future scale and nature of such funding. In addition, this EYSIP has been developed at a time of increasing fiscal constraint which has resulted in a significant reduction in the capital funds allocated to us for investment in education infrastructure.

The current pattern of government capital funding consists of:

- **Capital Maintenance** – a formula grant to the local authority for all maintained community schools. This funding is aimed at addressing condition needs in existing school premises, but does not include for academies.
- **Local Co-ordinated Voluntary Aided Programme** – a formula grant to the voluntary aided sector targeted at condition and suitability issues.
- **Basic Need** – a formula grant allocation to the local authority to help to ensure there are sufficient pupil places in all schools. In 2013/4 there was no allocation of this fund. It is to be used to secure the additional capacity needed to meet immediate local pressure for additional places, primarily through the phased expansion of existing schools.
- **Universal Free School Meals Capital** – this is new funding that will be used to improve school kitchens or increase dining capacity to ensure every reception, year 1 & 2 child receives a free school lunch from September 2014.
- **Priority Schools Building Programme** – central Government grant funding to re-build schools in the worst condition (primary and secondary).
- **Academies Capital Maintenance Fund** – a central Government capital grant fund available to academies and targeted at condition, suitability and expanding successful academies (not basic need). Academy schools are required to bid directly to Education Funding Agency to secure money from this fund on an annual basis.
- **Devolved Formula Capital** – a relatively limited capital allocation made directly to state funded schools to support small scale refurbishment and ICT development.

Targeting resources

It is proposed to target capital resources available to the Local Authority to the following strategic priorities:

Strategic Priorities	Capital Funding
Condition Need <ul style="list-style-type: none"> • Building Structure • Mechanical • Electrical Health & Safety Issues Special Educational Needs Emergency Works Surplus Capacity/Rationalisation Contingency	Capital Maintenance – LA Maintained Schools / Voluntary Aided Sector (Academies are required to bid direct to Education Funding Agency for this funding)
Suitability / Curriculum Issues Playing Fields/Sports Facilities	Dedicated Schools Grant (RCCO) – All Schools Potential External Funding
School Capacity <ul style="list-style-type: none"> • Pupil Growth Forecast 	Basic Need – All Schools Developer Section 106 Contributions
School Kitchens/Dining Facilities	Universal Free School Meals Capital – LA Maintained Schools/Voluntary Aided Sector (Academies are required to bid direct to Education Funding Agency for this funding)
Priority Schools Building Programme	DfE Capital Grant – All Schools

All schools will be expected to make contributions of a minimum 10% towards schemes identified for their school. This could be from available devolved formula capital or revenue budgets. These shared funding principles have been previously agreed through the Schools Forum.

A contingency fund allocated from Capital Maintenance will continue to ensure that urgent but unforeseen items can be addressed should the need arise.

Funding additional capacity

It is the statutory duty of the Local Authority to provide sufficient places for all pupils in Hartlepool.

While the additional places that can be funded from the Basic Need allocation do add to the overall capacity, this is insufficient to meet the growth in numbers arising from new residential developments. The responsibility for that currently falls on the development industry through Section 106 contributions as an agreed outcome of the planning process. Potential new developments are being analysed with a view to securing Section 106 contributions from developers in local areas. It is hoped, these

contributions, coupled with the Basic Need funding can provide for additional places required throughout the town (see section below).

Diocese Schools

Hartlepool LA co-ordinates, in consultation with the Roman Catholic Diocese of Hexham & Newcastle and the Church of England Diocese of Durham & Newcastle, the Locally Controlled Voluntary Aided Programme (LCVAP). Condition priorities are identified from surveys undertaken for the voluntary-aided sector and are allocated against local need.

When a locally agreed programme of projects has been selected, these are submitted to the Education Funding Agency for final approval.

Academy Schools

When a school converts to academy status, the responsibility to improve the condition of the building lies with the Academy Trust. Academies can apply to the Academy Capital Maintenance Fund (ACMF) for up to two capital projects. The main priority is to support schemes which have a significant urgent building condition and/or health and safety need which cannot be met from routine maintenance or devolved capital funding. Schemes will be considered which have a value of between £5,000 - £4 million.

Priority School Building Programme (PSBP)

This programme is to address the schools which are deemed to be in the worst condition and in need of urgent repair. As part of Phase 1 of the programme there have been 261 successful applications for the PSBP nationally, out of 580 eligible applications. Hartlepool Local Authority has been successful in securing capital grant funding, circa £17m, to completely re-build 3 of its schools. These are:

- Manor College of Technology
- Barnard Grove Primary School
- Holy Trinity CE Primary School

Building work has commenced on all three schools and all schools are expected to be fully completed and in use by 2016.

Phase 2 of the PSBP was announced in May 2014, allowing schools, faith bodies and local authorities to submit Expressions of Interest. The new phase is a 5 year programme (operating between 2015-2021) to undertake major rebuilding and refurbishment projects in those schools and sixth form colleges in the very worst condition. Hartlepool has submitted Expressions of Interest for five educational establishments, the DfE anticipates that applicants will be informed by the end of 2014 whether applications have been successful.

Consultation/Decision making process

In order to ensure all available capital funding is targeted to meeting priorities across all Hartlepool schools, the Local Authority has established a Schools Forum Capital Sub Group. This group comprises of Headteachers (primary, secondary and special), Diocese and Academy Representatives and Local Authority Officers. The group is presented with details of potential capital spending priorities, regular programme updates and financial monitoring reports.

While data will be a key driver for prioritising and allocating capital funding, formal decision-making will be via the Children's Services Policy Committee, supported by the work of the Schools Capital Sub Group.

Prioritising investment

Against a background of budget reductions and uncertainty about central government support, it will be increasingly important for us to work with key stakeholders to identify our key priorities for future investment. Set against our principles, the two main drivers underpinning investment prioritisation will continue to be:

- The need for us to meet our statutory obligations in terms of pupil place provision;
- The need to ensure a safe and healthy environment for pupils in terms of maintenance investment.

Developer Contributions

Cost per Pupil Place

On 1 October 2012 the Department for Education published baseline design standards for schools and associated cost information. The updated costs were derived from a review undertaken by the Education Funding Agency which sought to reduce school construction costs through efficiency savings. The review identified a suite of standardised drawings and specifications which could be applied across a wide range of educational facilities. The government is applying these standard costs as ceilings for the Priority School Building Programme and for the Targeted Basic Need Programme.

The cost factor that the council will apply for the 2014/15 financial year is **£9,165** per primary pupil place and **£12,205** per secondary pupil place. This is derived from the Education Funding Agency's contractors' framework rates, as set out within cost guidance published by the Department for Education. Detail on how this figure has been derived is set out below.

Basis of calculation

Appendix 1 (see page ??) of the Department for Education guidance identifies a total construction cost of £3,699,415 for a 2FE (form entry) primary school outside of London. The guidance identifies that this figure reflects the capital cost of creating new build floorspace (new schools or new build extensions to existing schools) and includes building costs, site costs, professional fees, fixtures, fittings and equipment, ICT infrastructure and ICT hardware. The guidance identifies that in addition to this, there will be a need for funding for technical adviser fees (including project management), which will be up to £150,000 per new build project.

Adding the £150,000 to the £3,699,415 results in a total cost of **£3,849,415** to deliver a 2FE primary school. Dividing this figure by 420 pupil places (the number of pupils within a 2FE school (i.e. 2 x 30 pupils per form x 7 year group cohorts)) gives a total cost per primary pupil place of **£9,165**.

As the most up to date published guidance on the government's assumptions regarding the capital funding costs that new build school facilities should be able to achieve, this is considered to be the most appropriate basis for defining the cost per primary pupil place factor.

The cost factor will be published annually by the council, to reflect the average capital cost of creating an additional primary school place through new-build construction/extension. The most up to date published cost at the point of an application's determination will be used for the purpose of calculating the financial requirement.

All financial contributions will be index linked (using the Retail Prices Index – all items) to the date of the determination of the planning application by the council. Where there is clear evidence that the costs of relevant works/services have increased or decreased (having regard to the most up to date cost data published by the council), then any financial contributions sought through planning obligations may be adjusted accordingly.

Financial Contributions

When an application for Planning permission is received by the Planning Authority, a range of service and infrastructure providers are consulted, including for the provision of education.

When an application is received an expected pupil yield from the development is calculated, taking consideration of the size of development (number of properties), the type of development (2/3/4 bed etc.). The council will also consider the relevant planning area position as set out in Section ??

A local formula has been developed, reflecting the number of pupils expected to reside in the dwellings during and beyond completion of the development. This is summarised as:

15 community primary school pupils per 100 houses built
3.6 Roman Catholic primary pupils per 100 houses built
18.6 primary pupils in total per 100 houses built

10 secondary pupils per 100 houses built
3 Roman Catholic secondary pupils per 100 houses built
13 secondary pupils in total per 100 houses built

Number of houses to be built/100 x 18.6 primary pupils
Number of houses to be built/100 x 13 secondary pupils

Given the recent increases in birth rates and the subsequent reductions in surplus places, it is generally presumed that all developments will be required to contribute towards additional capacity.

Off-site Provision

In cases where a school is to be provided off site, the developer will normally be expected to construct educational facilities to the Local Authority's design and specification and at their own cost. If the land is not in either parties' ownership, the developer will be expected to acquire the site

Viability Test

The Planning authority are advised to carefully consider the 'viability' of development to ensure that new developments are not subject to a scale of obligations which would threaten their viability. To ensure viability the costs to be applied to development (such as for education or affordable housing) should ensure that a willing landowner and developer can competitively deliver a development without prohibitive infrastructure costs. These issues need to be balanced against - the wider benefits of the development (e.g. meeting identified housing need or regeneration benefits).