

TITLE

**Southampton City Council
Education Capital Programme**

APPENDIX 1

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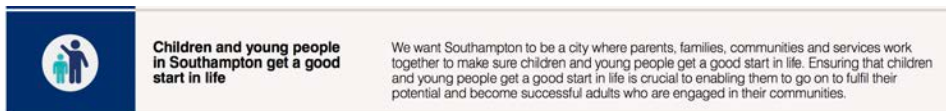
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Contents

- 1. Introduction**
- 2. Executive Summary**
- 3. Recommendations**
- 4. The Current Education Provision within the City**
- 5. Forecasting & Demographics**
- 6. Secondary Phase**
- 7. Education Capital Programme Blueprint**
- 8. Education Capital Programme Investment Profile**

1. Introduction

- 1.0 The Southampton City Council Strategy 2016 – 2020 clearly sets out a commitment to children and young people:



- 1.1 *The Vision set out in this Capital Programme goes beyond the provision of buildings and accommodation. The proposals are to provide quality places that support, underpin and facilitate the Educational Strategy, Aspirations and Vision for the Council. The approach is inclusive recognising the need to modernise SEND provision as well as the statutory requirement to provide sufficient secondary places.*
- 1.2 This report sets out the detailed proposals for the necessary capital investment, the planned outcomes and supporting governance, infrastructure and resources required to provide quality education places within the City for Southampton children into the 2020's.
- 1.3 Local Authorities have a statutory duty to provide sufficient school places as set out in s14(1) of the Education Act 1996. The Capital Programme set out in this report provides the infrastructure and outcomes to enable Southampton City Council to fulfil this statutory obligation into the mid 2020's.
- 1.4 The scope of the Capital Programme incorporates the Primary and Secondary Phases and Specialist Education Provision, (SEND) in the City.
- 1.5 The formal programme set out in Section 10.0 of this report will be structured into three work streams or tranches
- i. *Primary School Places.* Southampton City Council has previously invested significantly in the primary phase in order to meet the increased demand for places in the City. There are however a number of on-going projects specifically at Fairisle Junior School, St. Denys Primary School and Valentine Primary School. It is proposed the projects at these three schools are managed through the formal programme set out in this report.
 - ii. *Secondary School Places.* The requirements to provide an additional fifteen hundred, (1,500) secondary school places within the Central Planning Area of the City are set out in this report and shall be governed and managed through the formal programme specified at Section 10.0 of this report.
 - iii. *Specialist (SEND) Places.* The proposals in this report address the short to medium term requirements for (i) improved accommodation for children with Social Emotional & Mental Health, (SEMH) needs and (ii) the requirement for additional secondary age SEND places. The City has addressed the need for further SEND places in the primary phase and these children require secondary age places as a priority.

2. Executive Summary

- 2.0 This report serves as a formal Programme Brief for the Capital Programme. It sets out the mandate to act; the nature of the demand for school places; the extent of the demand; where and when the demand will manifest and the Capital Investment required to fulfil the demand along with the proposed capital projects to deliver the required outcomes.
- 2.1 The Capital Programme offers a viable strategy to mitigate against the over provision of places or indeed the under provision of places.
- 2.2 The Vision is inclusive and the programme will address the statutory SEND requirements into the next decade. The investment required to achieve this will be subject to full feasibility studies and further reports to Council Capital Board, Cabinet and Council
- 2.3 The Vision is not about buildings it is about Education. The Programme if endorsed by Council will place at its heart the needs and outcomes of Southampton children by providing quality places in Southampton. The Vision and Aspirations of the Education Service will inform the Programme not the other way round. The programme will be led and directed from within the Education Service.
- 2.4 The Programme sets out the requirement to deliver an additional 1,500 secondary places in the Central Planning Region by expansion of two schools by 600 places and the provision of a new secondary school.
- 2.5 Subject to Cabinet and Council approval of this Capital Programme Brief a detailed Capital Programme Blueprint will be drawn up setting out the Programme Vision, Governance, Timelines, (including all statutory consultation), Risks, Issues, Communications Plans in order to deliver the outcomes successfully.
- 2.6 In year movements by school and by year should be measured and charted over time in order to identify trends and early warning signs of poor performance in schools. This information is currently collated for the preparation of school place forecasts it should be used more widely.
- 2.7 From Spring 2019 Southampton City Council should consider Housing Developments in the City as part of the forecast model used for mainstream baseline forecasts for school places.
- 2.8 There is no requirement to increase capacity in the Primary Phase based on the outcomes from the verification of current capacity and demand.
- 2.9 Southampton City Council should adopt the best-fit methodology used in this analysis to predict future demand in the secondary phase and continuously monitor projected demand with each new forecast in the Spring and Autumn.
- 2.10 The recommended strategy for the City is to expand by 600 places and ensure maximum use of existing accommodation with the construction of a new 6FE (900) place Secondary School in the City.

2.11 Investment in the required additional places by expansion of existing schools should focus on the Central Planning Region and utilising available capacity in the West to meet demand for Year 7 places in the West until additional capacity is introduced through expansion.

2.12 Given resource constraints the proposed general strategy for each of the planning regions is:

West:	<i>Maximise existing available capacity to meet demand.</i>
Central:	<i>Invest to meet projected shortfall in demand.</i>
East:	<i>Retain existing capacity to meet future demand.</i>

2.13 Bitterne Park Secondary School has now occupied the new school buildings provided by the ESFA Priority Schools Building Programme (PSBP 1). Consideration should be given to investing in the provision of an all weather pitch at the school as part of the deficit recovery plan for the school (outside of capital profile).

2.14 The City will need to support Chamberlayne College for the Arts whilst NoR are low; in revenue terms a viable school requires a cohort of 600 children. It is anticipated numbers at the school will increase to a viable level by 2022 as a result of the increase in demand for places across the City and in the East.

2.15 The City Council shall ensure the already commissioned programme of improvement works at Regents Park Community School will enhance the Net Capacity of the school as far as possible in order to maximise the available capacity in the West Planning Region.

2.16 The City will engage and work with Oasis Academy Trust to maximise the capacity within Lordshill to support demand for places in the West Planning Region.

2.17 The Council support the requirement to build a new school in the Central Planning Region based on the rationale and analysis provided in this Programme Brief and approve the £31.86m investment.

2.18 Council provide assurances for St. Marks School and the Diocese that the identity, ethos and values of the school will be preserved and enhanced wherever feasible.

2.19 If and only if a Free School bid is secured at a later stage would it potentially bring in external funding for the construction of a school. At present Free School Applications are frozen and the date for Wave 14 of Applications has yet to be announced by Government. If a successful free school proposal were secured all investments prior to this proposal are at the Council's risk. There is a risk no Free School Proposals would be forthcoming.

2.20 In order to accommodate the requirement for additional places in September 2019 and to provide accommodation during construction the Authority should consider the hire of double classroom units for 2019-2020 at St. George.

3. Recommendations

- 3.0 The recommended strategy for the City is to expand by 600 places and ensure maximum use of existing accommodation with the construction of a new 6FE (900) place Secondary School in the City. The Council support the requirement to build a new school in the Central Planning Region based on the rationale and analysis provided in this Programme Brief and approve the £31.86m investment.
- 3.1 The Southampton Education service will engage with all stakeholders in formulating the full specification for the new school; this shall include the Diocese, St. Marks School, Schools Forum, Head Teachers, Special Head, The Regional Schools Commissioner's office the Education Skills Funding Agency (ESFA) & Department for Education. The specification of the school will set out the ethos, values and aspirations in line with the vision and needs of the City.
- 3.2 The proposals for the new school if endorsed by Council move forward on the Presumed Route and the Council needs to fully acknowledge the risk of funding and commissioning the new school sits with the Council.
- 3.3 The Authority should approach St. George Catholic College and St. Anne's Catholic College in order to seek agreement with the Academy Trust, (St. Anne's), the Diocese, Governors and Head Teachers to provide the additional capacity at these schools at a total cost of £9m. (Based on National Audit Office and EBD OG benchmarking of £15,000 per secondary place). The schools are in the Central Planning Region where the demand for additional places is highest and are two of the best performing schools in the city therefore the Council will be fulfilling the obligation to provide quality places.
- 3.4 Woodlands School is a PFI school with current levels of low occupancy. Southampton are paying a premium for accommodation in the school. Long term demand for places (Figure 16.0, Page 23) will ensure this capacity is fully utilised; however in the interim the City should explore all viable means to increase occupancy in the school to increase VfM. Proposals to utilise the current transient capacity to meet a shortfall in secondary SEND places should be facilitated and progressed as a priority.
- 3.5 To address the poor accommodation at Chamberlayne College for the Arts and to enhance the attractiveness of the school it is proposed to invest £8m in providing a full refurbishment of the Main Teaching Block and to improve the sports facilities at the school by 2022.
- 3.6 Cabinet and Council endorse the Capital Profile at Section 8.

4. The Current Education Provision within the City of Southampton

4.0 The Education Provision within the City of Southampton

4.0.1 There are currently seventy five schools in the City of Southampton. These consist of:

- One Nursery School
- Fifty Four Primary Phase Schools, (Age 4 – 11)
- Twelve Secondary Schools, (Age 11 – 16)
- Five Specialist (SEND) Schools
- One Special Free School
- One Pupil Referral Unit (Alternate Provision) and
- One Alternative Provision Academy

4.1 The Primary Phase.

4.1.1 There are currently ten Infant Schools in the City, (Year R to Year 2, Age 4 to 7) and eight Junior Schools, (Year 3 to 6, Age 7 to 11)

4.1.2 There are thirty-six Primary Schools in the City, (Year R to Year 6, Age 4 to 11)

4.1.3 Based on the January school census there are currently a total of 20,046 children in mainstream Primary Phase schools in the City.

4.1.4 Figure 1.0 on page 8 shows the names and locations of the primary phase schools in Southampton.

4.2 The Secondary Phase.

4.2.1 There are currently twelve mainstream secondary phase schools in the city, (Year 7 to Year 11, Age 11 to 16)

4.2.2 Again based on the January school census there are currently a total of 10,241 children educated in mainstream secondary phase schools in the city.

4.2.3 Figure 2.0 on page 9 shows the names and locations of the mainstream secondary phase schools in the city.

4.3 Specialist School (SEND) Provision.

4.3.1 There are currently eight specialist schools in Southampton. The names and locations of these schools are detailed at Figure 3.0 on page 10.

4.3.2 There are currently 603 children in specialist schools in the City and 1,137 children with EHCP plans in mainstream schools in the City.

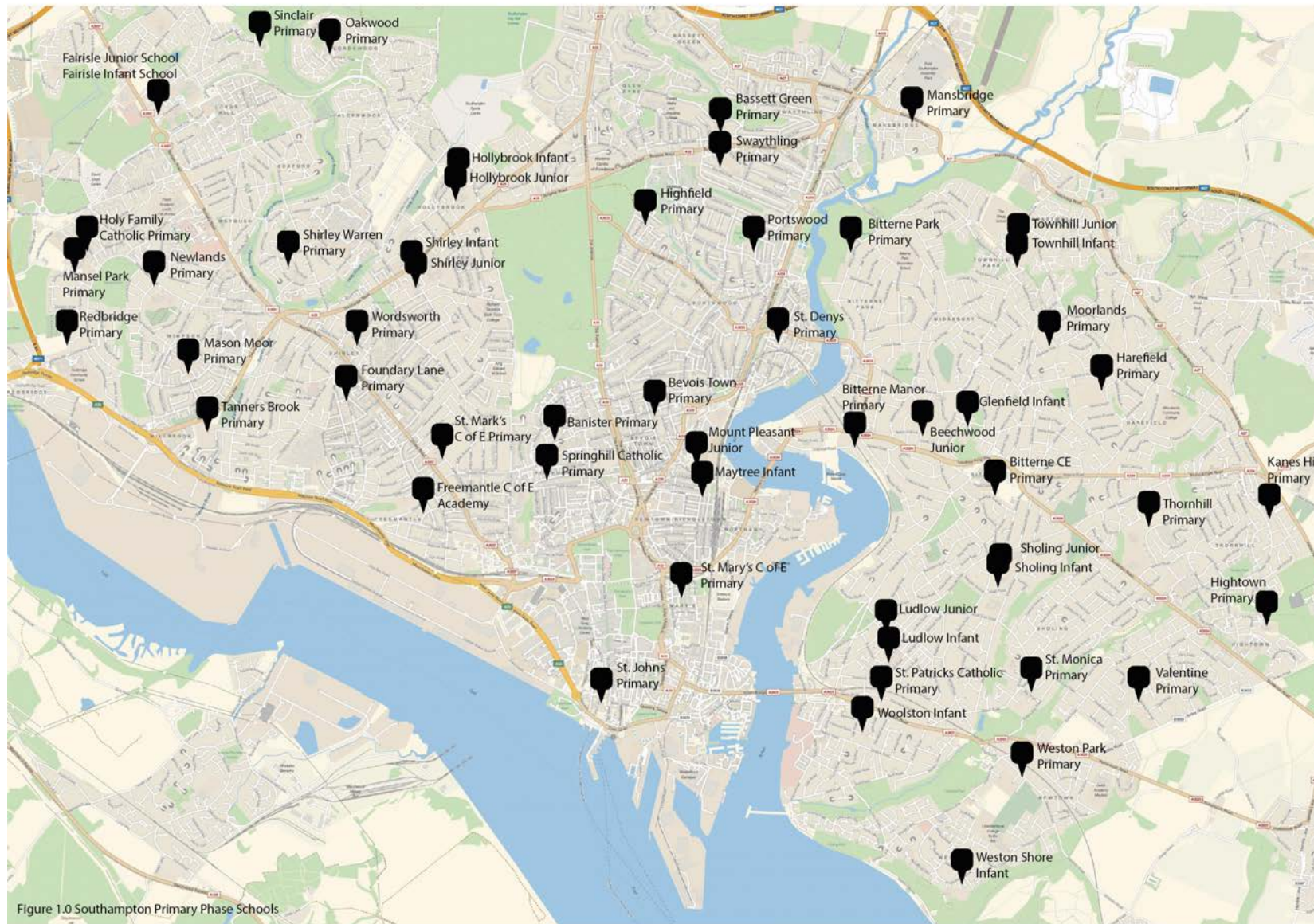


Figure 1.0 Southampton Primary Phase Schools

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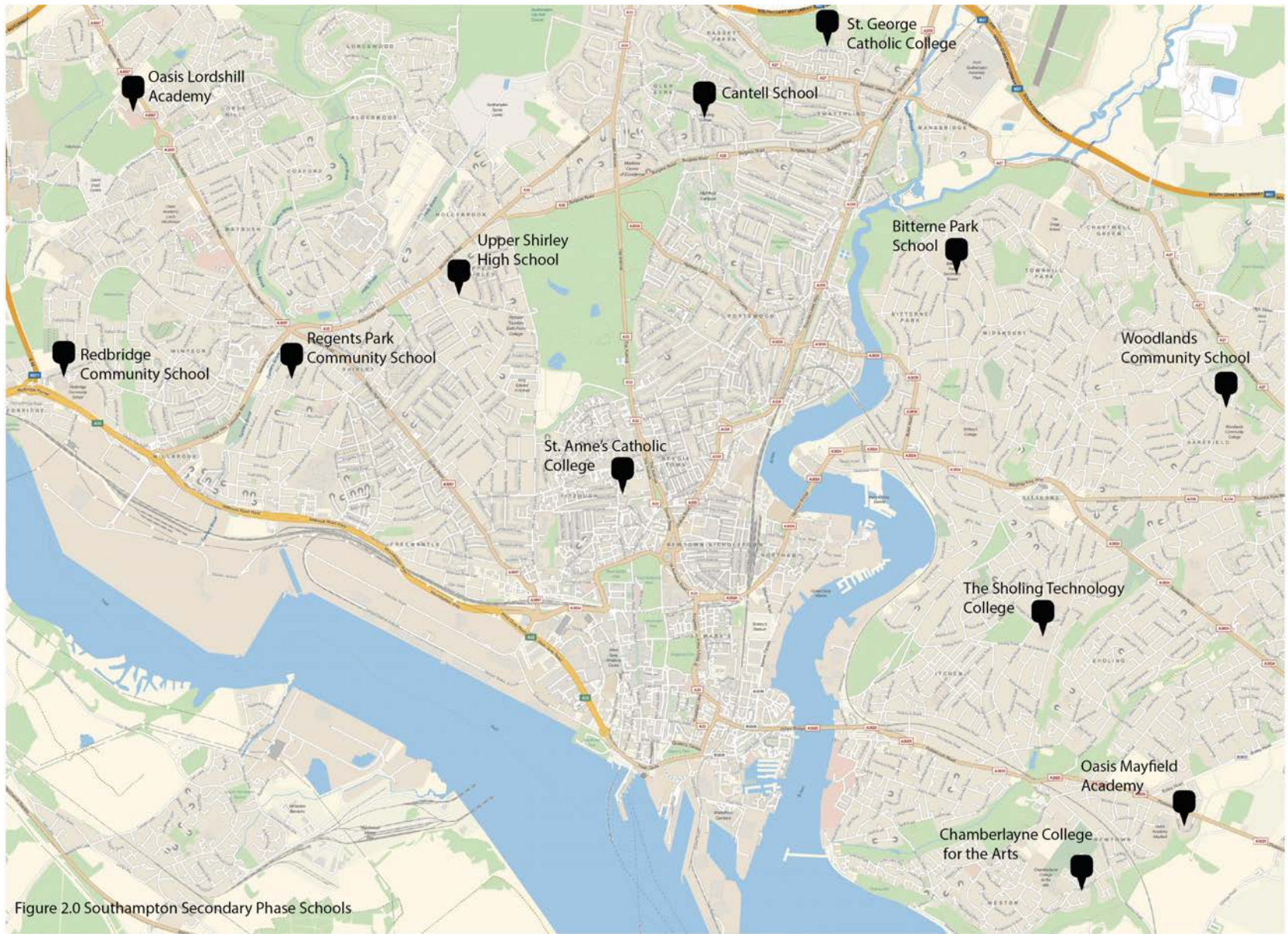


Figure 2.0 Southampton Secondary Phase Schools

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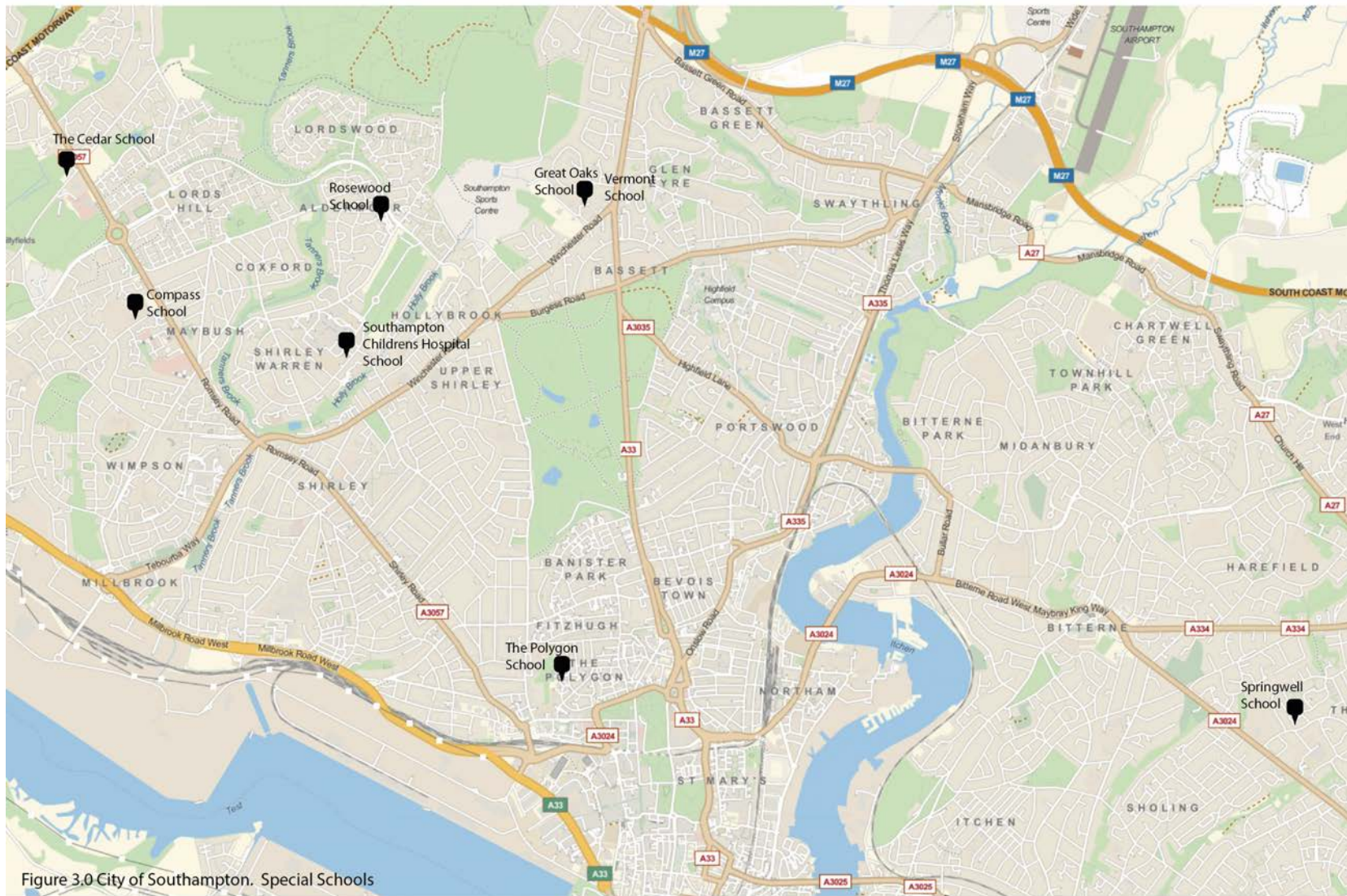


Figure 3.0 City of Southampton. Special Schools

4.4 **The Planning Regions.** For the purposes of school place planning the City of Southampton is divided into three planning areas. Figure 4.0 below details the boundaries between the three planning regions.

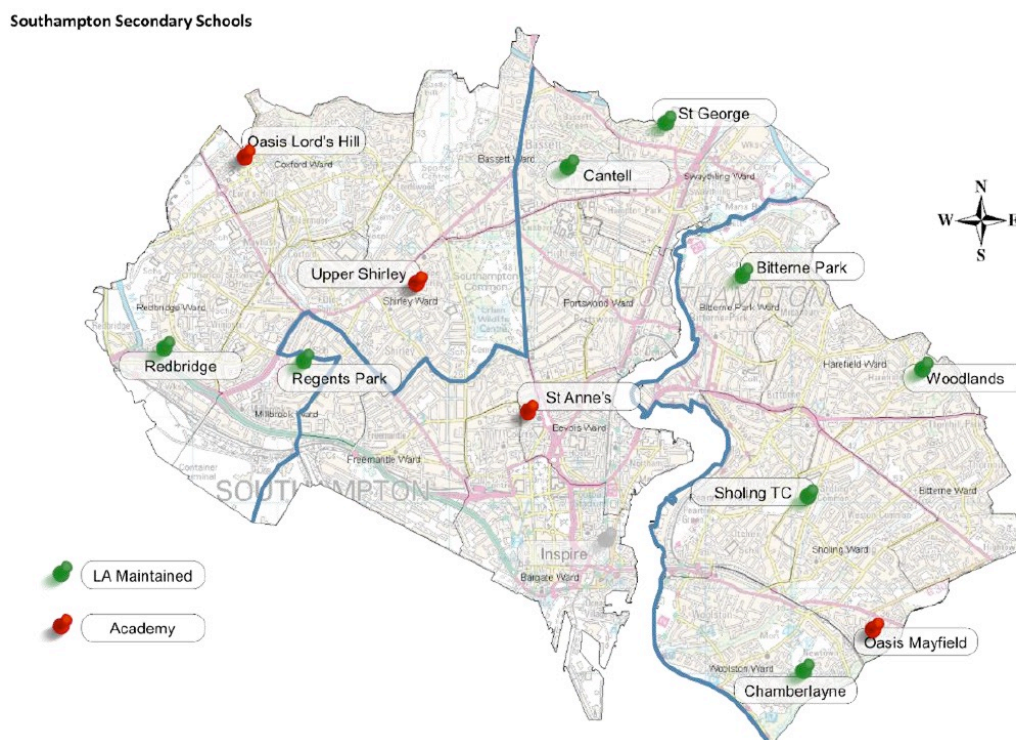


Figure 4.0. City of Southampton: Education Planning Areas

- 4.4.1 **The West Planning Region.** The West planning region includes Redbridge, and Coxford wards with the east sections of Bassett, Shirley and Millbrook wards.
- 4.4.2 **The East Planning Region.** The East planning region is defined as the part of the City to the East of the River Itchen. It includes the wards Woolston, Sholing, Bitterne, Harefield and Bitterne Park.
- 4.4.3 **The Central Planning Region.** The Central planning region includes Swaythling, Portswood, Bevois, Bargate and Freemantle wards with the east sections of Bassett, Shirley & Millbrook Wards.
- 4.4.4 Figures 5.0, 6.0 & 7.0 in Annex A, (pages 11 through 13) show all of the Primary and Secondary phase schools in the West, East and Central planning areas.

5. Forecasting & Demographics

5.0 Approach

5.0.1 The overall approach and underlying analyses undertaken to consider future provision for education places and the formulation of the required mechanism for the delivery of new school places within Southampton has four distinct threads or themes are:

- Verification of Primary Phase Capacity
- Demand for Secondary Places (Whole System Long Term Perspective)
- Demand for Secondary Places (Short to Medium Term Perspective)
- Demand for Specialist Places (Independent Review)

5.0.2 *Verification of Primary Phase Capacity.* The current capacity in all primary phase schools is measured and tracked over time to assess available capacity within the City's infant, junior and primary schools in order to verify the sufficiency of places in the time frame 2018 through to 2025.

5.0.3 *Demand for Secondary Places (Whole System Long Term Perspective).* The initial analysis of demand for secondary places identifies the current capacity in all secondary phase schools within the City across all planning regions in the time frame 2018 through to 2028.

5.0.4 *Demand for Secondary Places (Planning Areas Short to Medium Term Perspective).* The next stage of the analysis considers the short to medium term timeframe from 2018 through to 2023 and considers demand in the East, Central and West planning areas.

5.0.5 *Demand for Specialist Places (January 2018 SEND Forecast and Independent Review).* Southampton City Council produces annual forecasts for specialist places. Southampton City Council has recently commissioned an independent review of SEND provision across the City for all needs, (Annex C). The review has been undertaken by Portsmouth City Council. The options identified and outcomes from this review should inform the Capital Programme as detailed in this report.

5.1 Methodology

5.1.1 Forecasting is not an exact science. Southampton City Council produces two five-year school place forecasts for mainstream schools each year one in the spring and another in the summer.

5.1.2 The methodology used for the baseline mainstream forecasts is based on DfE guidance and best practice.

5.1.3 A census is conducted in order to verify the number of children in each year group in each school within the City and this is used as the base data for the five-year mainstream forecast.

- 5.1.4 The following factors are taken into account when producing forecasts for mainstream school places in Southampton:
- Numbers of Children living in the City
 - Birth Rates
 - Numbers of Children attending Schools in the City
 - % participation rates for intakes into Primary, Junior and Secondary Schools
 - % In-Year movements in schools
 - Year R (Reception) and Year 7 (Secondary)
 - Parental Choice
 - The 'Hampshire Pushback'
- 5.1.5 The Reception Year, (Year R) demand for places is calculated from live birth statistics and from HMRC Benefit data. The data is mapped by Lower Super Output Areas, (LSOA) this provides the data necessary to map birth rates and pre-school age children with infant and primary school catchment areas.
- 5.1.6 The Year 7, (Age 11) intake for secondary schools is calculated from allocated feeder schools for each secondary school; a participation rate is calculated from a rolling three-year mean which factors parental choice for each secondary school. Figure 8.0 on page 14 illustrates the logical network of feeder schools for the twelve secondary schools in the City. It should be noted feeder schools are not necessarily in the same planning region as the secondary schools
- 5.1.7 Where children leave a school or join a school after Year R in infant and primary schools and after Year 3 in junior schools this generates 'In-Year Movements'. These can have an impact on place planning and forecasting.
- 5.1.8 In year movements are calculated by school and by year group based on a rolling three year arithmetic mean. In year movements and trends over time provide useful information for school place planning and school improvement.
- R1.** In year movements by school and by year should be measured and charted over time in order to identify trends and early warning signs. This information is currently collated for the preparation of school place forecasts.
- 5.1.9 The accuracy and stability of the baseline five year forecasts for primary and secondary phase mainstream schools is accurate. This is illustrated in Table 1.0 on page 15.
- 5.1.10 The accuracy of the forecast methodology can be analysed by taking a five year forecast from the past and comparing the forecast numbers in schools with the actual Numbers on Roll, (NoR) from the school place census.
- 5.1.11 The results from the 2013-14 five year survey were taken and the total number of pupils in each secondary school were considered and verified against the actual Numbers on Roll, (NoR) for all of the intervening pupil censuses.

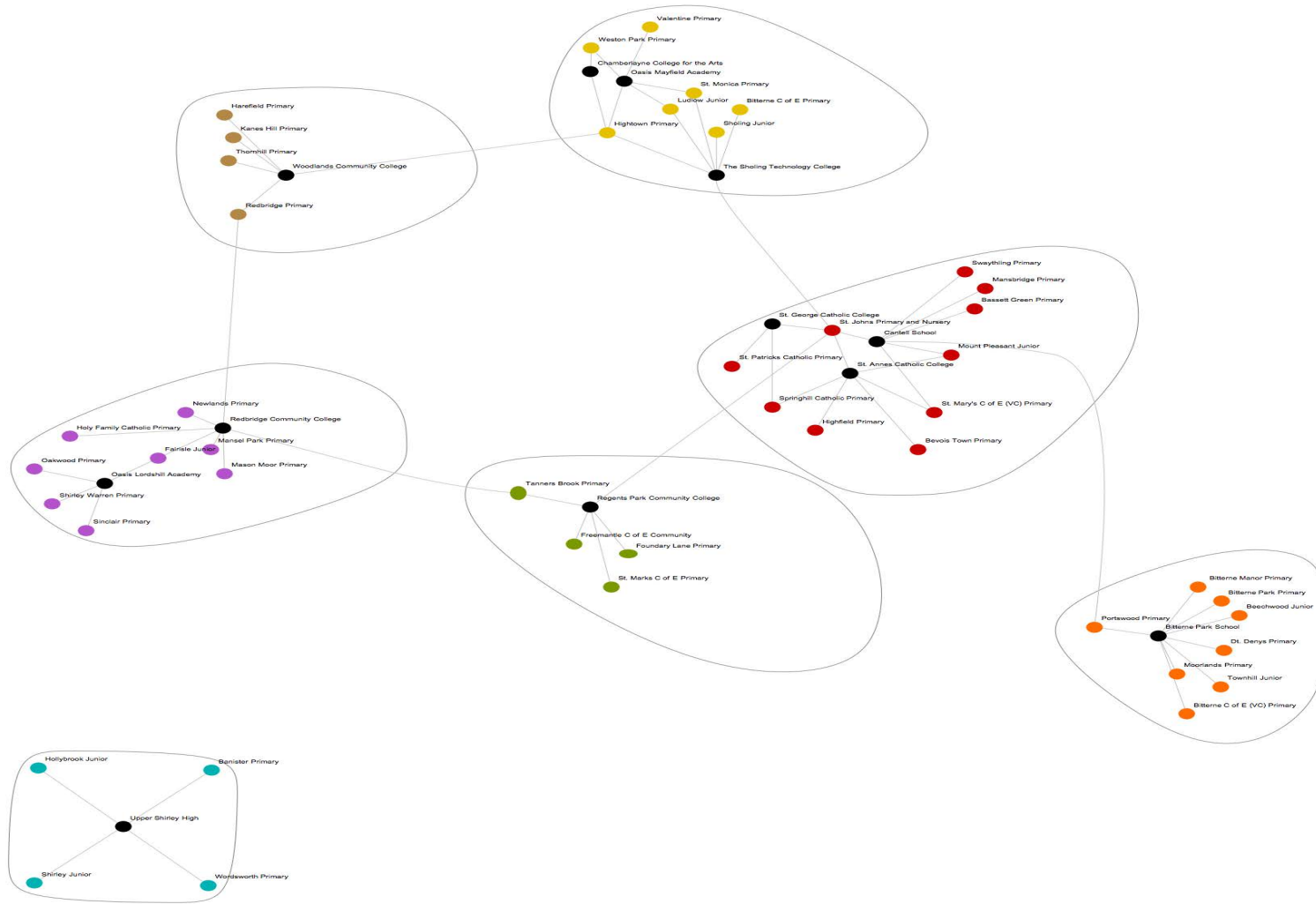


Figure 8.0 Southampton City Council Schematic Schools Network (Showing Feeder Schools for Secondary Schools)

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 Capital Programme v0.23
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	2014-2015			2015-2016			2016-2017			2017-2018		
	Predicated	Actual	Variance	Predicted	Actual	Variance	Predicted	Actual	Variance	Predicted	Actual	Variance
2013-14 Survey	9599	9579	-20	9719	9790	71	9850	9918	68	10248	10241	-7
Regents Park Community College	661	664	3	636	698	62	632	694	62	635	730	95
The Sholing Technology College	1,034	1029	-5	1,029	1,016	-13	1,041	990	-51	1051	940	-111
Redbridge Community College	1,027	1000	-27	1,060	1,002	-58	1,086	993	-93	1149	992	-157
Chamberlayne College or the Arts	431	488	57	380	475	95	352	450	98	334	414	80
Upper Shirley High School	758	753	-5	780	766	-14	821	765	-56	827	790	-37
Bitterne Park Secondary School	1,489	1489	0	1,510	1,492	-18	1,519	1,503	-16	1540	1563	23
Woodlands Community School	583	555	-28	573	558	-15	564	519	-45	580	562	-18
Cantell Maths and Computing College	841	858	17	870	893	23	882	930	48	926	958	32
St. George Catholic College	594	584	-10	653	668	15	687	716	29	724	798	74
St. Anne's Catholic College	959	958	-1	947	962	15	957	984	27	966	1036	70
Oasis Acedemy Lordshill	479	503	24	486	540	54	488	590	102	506	604	98
Oasis Academy Mayfield	678	664	-14	728	720	-8	820	784	-36	948	854	-94

Table 1.0 *Accuracy and Stability Test of Five Year Baseline Forecast for School Places.*

- 5.1.12 The results shown in Table 1.0 indicate the five year forecast is accurate to within 1% in relation to the City wide and Planning Area totals.
- 5.1.13 The accuracy on an individual school basis decreases over time due to unpredictable changes in parental choice and in-year movements. However the error in the fifth year of the forecast remains at around 10%.
- 5.1.14 In conclusion the five year forecasts produced internally by Southampton City Council can be used to inform the requirements of the Capital Programme with surety for the short to medium term, (September 2018 through to September 2023)

5.2 Verification of Primary Phase Capacity

- 5.2.1 In the time frame 2011 through to 2014 Southampton City Council commissioned a portfolio of projects in the Primary Phase in order to increase capacity within the City.
- 5.2.2 The data required to track and monitor capacity and Numbers on Roll, (NoR) at infant, junior and primary schools has been collated and an analysis of the data has been completed.
- 5.2.3 Figure 9.0 on page 17 presents a random selection of the results. Capacity in the primary phase has increased and the Numbers on Roll at individual schools has increased to match this.
- 5.2.4 Forecasts predict the Year R admissions for the City will rise to 3,927 this year in September 2018, with a total Primary Phase population peaking in 2019-2020 at 20,276. The number of Year R admissions then declines marginally into and throughout the 2020's.
- 5.2.5 The current total capacity for Primary Phase places is 20,967. With peak demand at 20,726 this gives 3% headroom and is below the DfE recommended 5% headroom.
- 5.2.6 The Council does not take full account of housing developments in the production of forecasts the rationale for this is twofold (i) where there is overall capacity in the system (as is the case with the Secondary Phase at present) the available capacity can easily meet the demand from housing developments in the City and (ii) in the time frame 1999 through to 2015 there were approximately 16,000 housing completions in the City; eighty percent (80%) of which were one or two bedroom flats or apartments with low yields for primary and secondary age children.
- 5.2.7 Given the Primary Phase is currently close to capacity and the Secondary Phase will exceed overall capacity by 2020 it is recommended the Council includes future Housing Developments in the preparation of the five year base line forecasts.

R2. From Spring 2019 Southampton City Council should consider Housing Developments in the City as part of the forecast model used for mainstream baseline forecasts for school places.

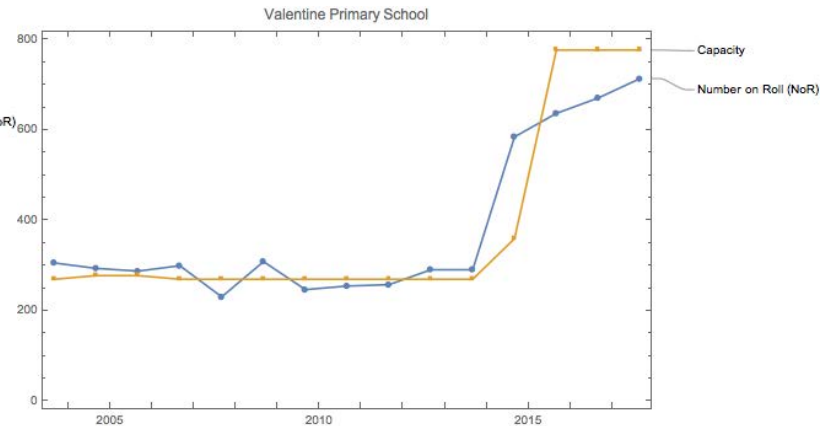
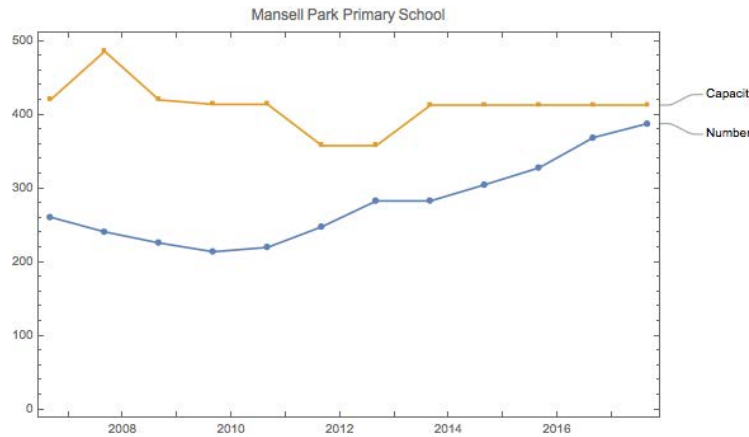
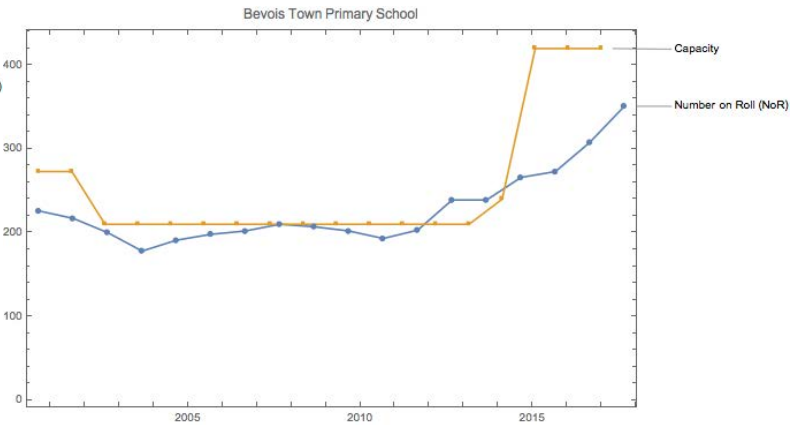
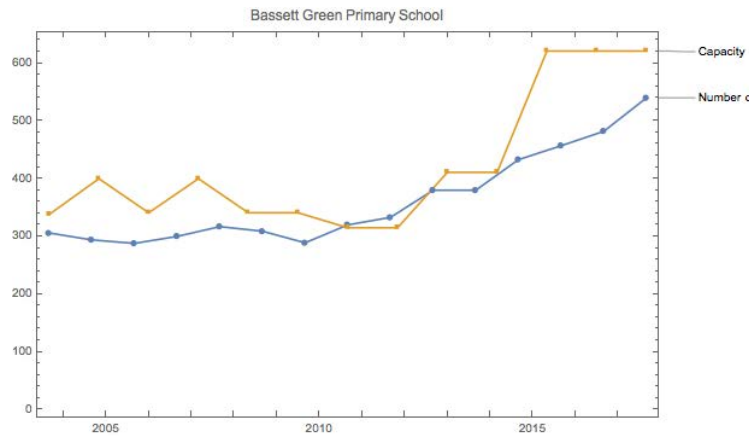


Figure 9.0 Capacity and Numbers on Roll, (NoR) for Bassett Green, Bevois Town, Mansell Park & Valentine Primary Schools (2003 to 2017)

5.3 The 'Hampshire Pushback'

- 5.3.1 Hampshire County Council has had sufficient latent capacity in their secondary schools to offer places and admit Southampton children into three secondary schools adjacent to the boundary of the City.
- 5.3.2 The three Hampshire secondary schools who admit children from the City are The Mountbatten and The Romsey schools in Romsey and The Hamble School in Hamble-le-Rice.
- 5.3.3 The term pushback refers to the increase in demand for secondary places in Southampton Schools as result of the spare capacity in Hampshire Schools being taken up by increased demand for places within the County in future years. To date this increased demand has not fully materialised as the capacity remains in the schools and The Hamble School has admitted over its Published Admission Number, (PAN) in September 2018.
- 5.3.4 The number of children admitted to the three Hampshire schools in September 2018 is thirty-five. There were 87 Southampton children who selected The Hamble School as their first choice in this year's admissions, (this represents 3% of the total number of Year 6 children in Southampton).
- 5.3.5 Southampton City Council continues to monitor the potential impact of the pushback. Figure 10.0 below illustrates the predicted trend in increased demand in the City as a consequence of the reduction in available capacity in the three Hampshire Schools.

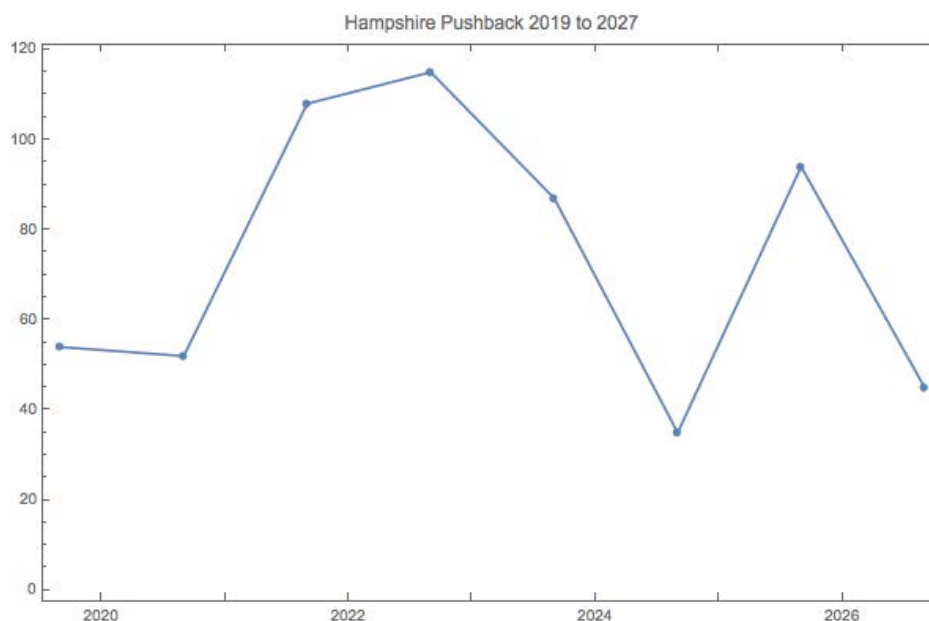


Figure 10.0 Hampshire Pushback Trend (2019 to 2027)

- 5.3.6 As can be seen from Figure 10.0 there is no overall trend. The highest predicted increase in demand is 115 places in 2023 and the lowest is 20 places.
- 5.3.7 As the increase in demand is determined by parental choice which in turn is influenced by many factors the numbers will be subject to unpredictable variance. It should be noted however that an increase in demand of 115 places is equivalent to three forms of entry (3FE).
- 5.3.8 There is no standard methodology for predicting the demand from the pushback. Southampton City Council produce baseline forecasts both with and without the impact of pushback. Figure 11.0 below sets out the projected demand over the next ten years for secondary places with and without pushback.

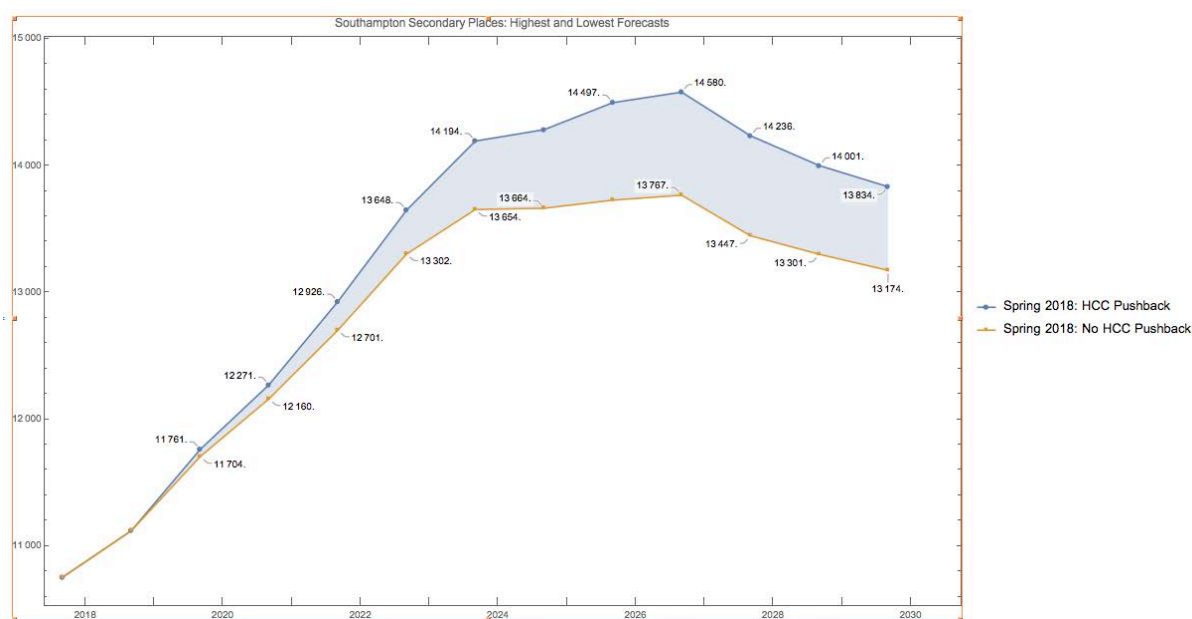


Figure 11.0 Hampshire Pushback (2018 to 2029)

- 5.3.9 The impact of pushback is cumulative over time. The lower demand curve (without pushback) peaks at 13,767 places in 2027 and the upper demand curve (with pushback) peaks at 14,580 in the same year. This is a difference of around 800 places.
- 5.3.10 Predicting demand and developing a capital programme to meet this demand is extremely challenging. The extent and when the pushback materialises is difficult if not impossible to predict. If Southampton build to the upper curve and the demand does not materialise then there will be a surplus of places within the City on the other hand if the Council builds to the lower demand curve (without pushback) then it is possible there will be a shortfall of places.
- 5.3.11 The baseline forecasts are accurate (Table 1.0) because they are based on children already in the system, (in the primary phase) or already born and living in the City. The basis of the model is empirical. In contrast longer term forecasting (beyond five years) is based to some extent on probabilistic methods as are the methods used to estimate the extent of the pushback. This amplifies uncertainty and likely error in longer term projections.

5.3.12 However it is known Hampshire are predicting an increase in demand for secondary places due to increased demand from housing developments in the County. In the timeframe 2017 through to 2022 there will be 33,000 housing completions in the County. Figure 12.0 below shows the projected increase in demand for secondary places in the County.

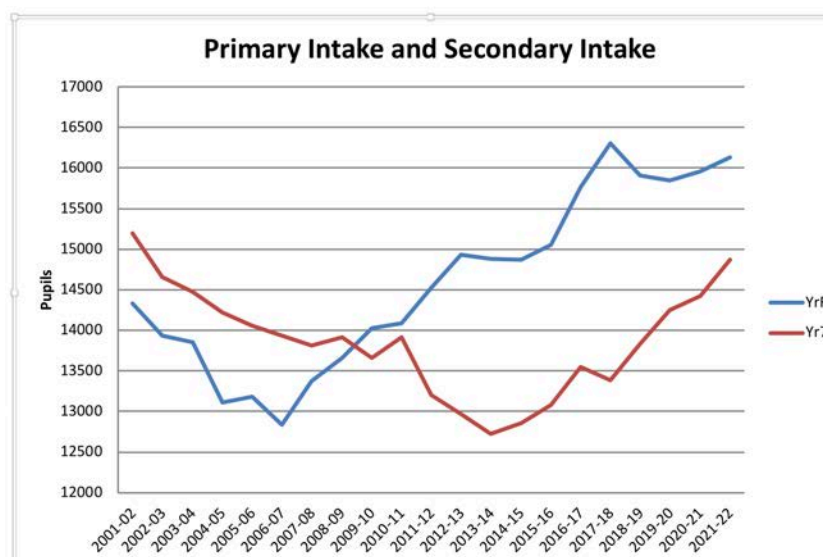


Figure 12.0 Projected Demand for School Places in Hampshire.

5.3.13 Hampshire County Council are planning to build a new 6FE (900 Place) secondary school in Botley. This will meet the need for local housing developments in Botley and Hedge End. The planned school will be further from the City boundary than the three schools currently

5.3.14 Southampton City Council officers have met with the School Place Planning team in Hampshire and the predicted increase in demand for places within the County has been verified. The mutual conclusion is the City of Southampton will experience increased demand as a result of increased internal demand for secondary places within Hampshire. The extent and timing of the increase in demand is difficult to predict with certainty.

5.4 Whole System Long Term Analysis of Demand

5.4.1 The starting point in assessing the future demand for secondary places in the City in order to determine the requirements for a capital programme to provide the necessary places is to consider the City as a whole, i.e. to look at demand and capacity across the three planning areas (West, East & Central).

5.4.2 The current combined capacity of all schools in the City, (academies and LA maintained schools) is 11,900 places. This rises to 12,080 places in September 2018 as Upper Shirley High School increases its PAN to 180.

5.4.3 Forecasting is not a science and forecasts are subject to variance as a result of many factors including changes in the data sources used and methodology used.

Therefore rather than basing strategic decisions on a single (latest) forecast the outcomes from six forecasts have been considered collectively.

5.4.4 Figure 13.0 shows the six individual forecasts considered in this analysis.

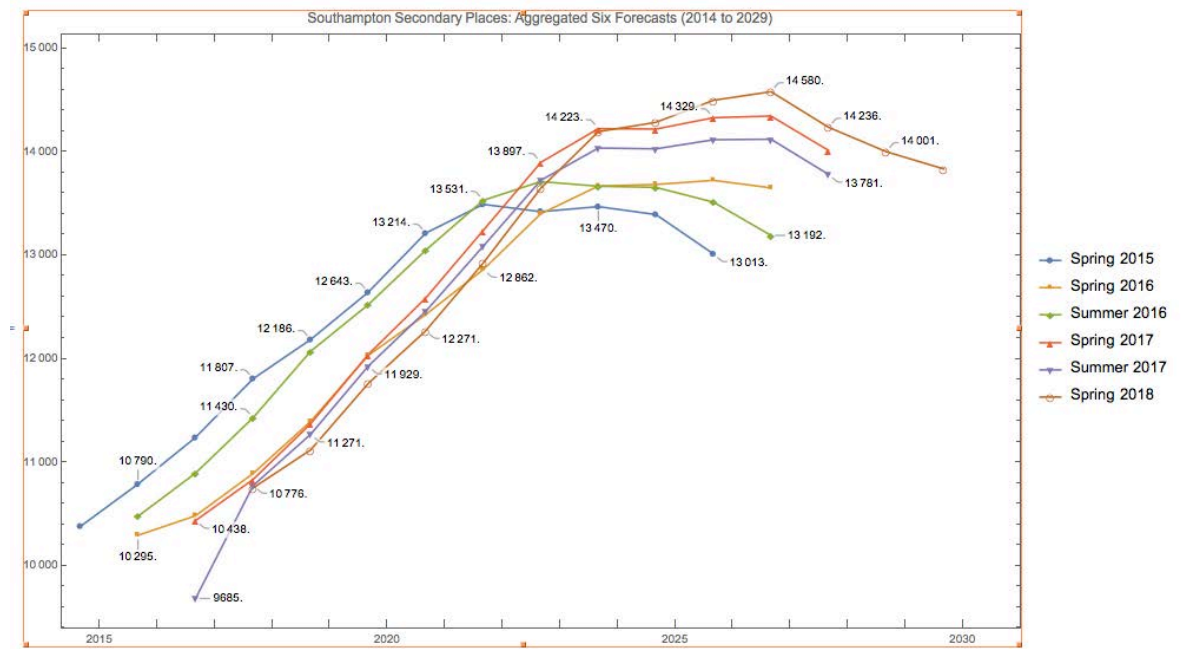


Figure 13.0. Forecasts & Variation

5.4.5 Figure 13.0 illustrates the variation between individual forecasts. The forecasts considered ran from Spring 2015 through to the latest forecast in Spring 2018. Figure 14.0 below compares the lowest forecast (Spring 2015) with the highest forecast (Spring 2018)

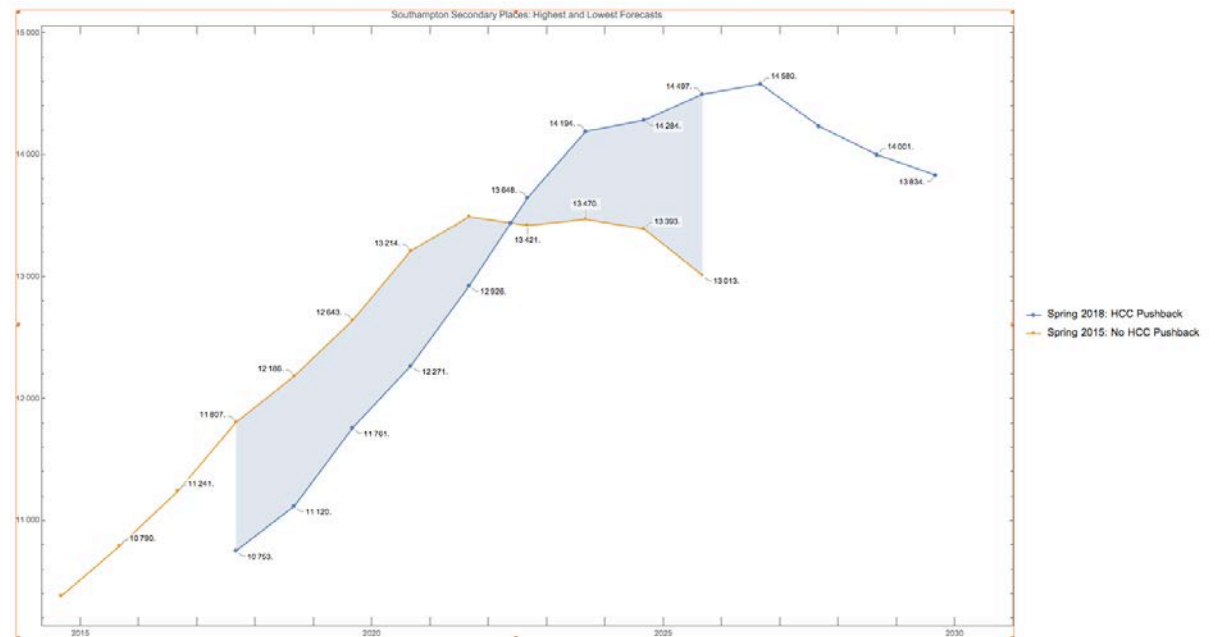


Figure 14.0 Highest and Lowest Forecasts.

5.4.6 Figure 14.0 illustrates the extent of the variation between the lowest and highest forecasts considered. The forecasts used in this analysis both included for and excluded the impact of Hampshire Pushback. This variation between the lowest and highest forecast is in the region of 1,100 places.

5.4.7 A weighted arithmetic mean was constructed from all of the source forecasts to find a best fit trajectory, or most likely demand curve for the next eleven years. This approach relies on the fact that forecasting improves over time with the use of better models and improved source data. Figure 15.0 shows the resultant best fit demand curve (blue dotted line) with the two Spring 2018 forecasts.

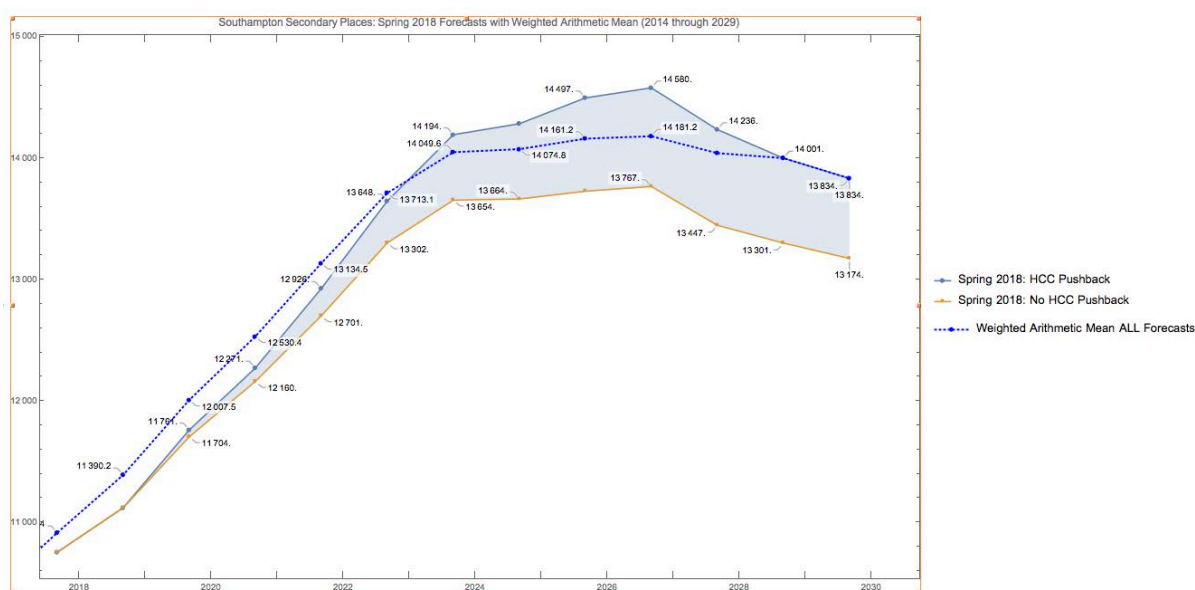


Figure 15.0 Latest Forecasts with Weighted Arithmetic Mean

5.4.8 Though weightings are subjective and to some extent arbitrary they do take into consideration improved accuracy of forecasts over time. The peak demand for secondary places across the City rises from its base of 11,900 in 2018 to 14,200 places in 2027.

5.4.9 The Flat-Line. Figure 16.0 below illustrates the 'do-nothing' scenario. The overall demand for places across the City outstrips the capacity in September 2021.

5.4.10 This does not take into consideration demand in the three planning areas is not uniform. There is considerable current capacity in the East Planning region. The conclusion drawn from Figure 16.0 is even without pushback all capacity in the existing secondary schools across the City will be filled in the early 2020's.

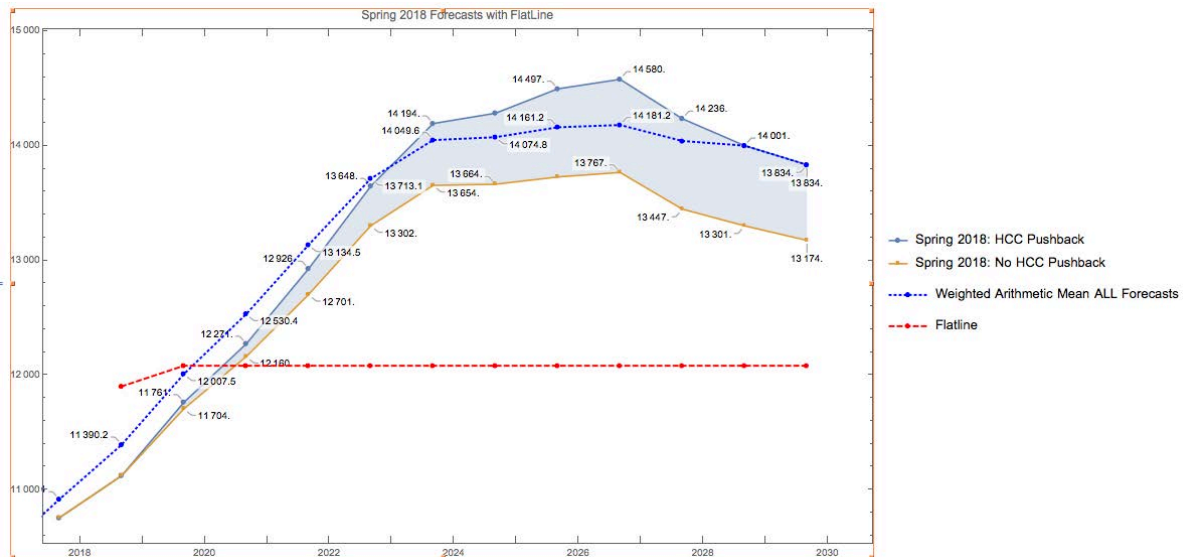


Figure 16.0 The Flat-Line, (Do-Nothing) Position.

5.4.11 Expansion Strategy. The gap in demand cannot be fulfilled by adopting an expansion only strategy. Local Authorities are only able to expand schools that are assessed as 'Good' or 'Outstanding' by Ofsted. In addition there are constraints at specific school sites which limit the extent expansion can take place. These constraints have previously been identified in the 'Building for Excellence' programme commissioned by Southampton City Council.

5.4.12 The upper boundary for creating places through expansion of existing schools across the City is estimated to be in the region of 1,200 places. The significant available capacity in the East of the City, (circa 1,100 places) suggests it would not be practical to consider expanding schools in the East. The available capacity in the East is needed to cater for projected increased demand in the East (particularly when the pushback from Hampshire materialises).

5.4.13 Figure 17.0 below illustrates the change in capacity if Southampton were to adopt a strategy of increasing the number of places by 750 through expansion.

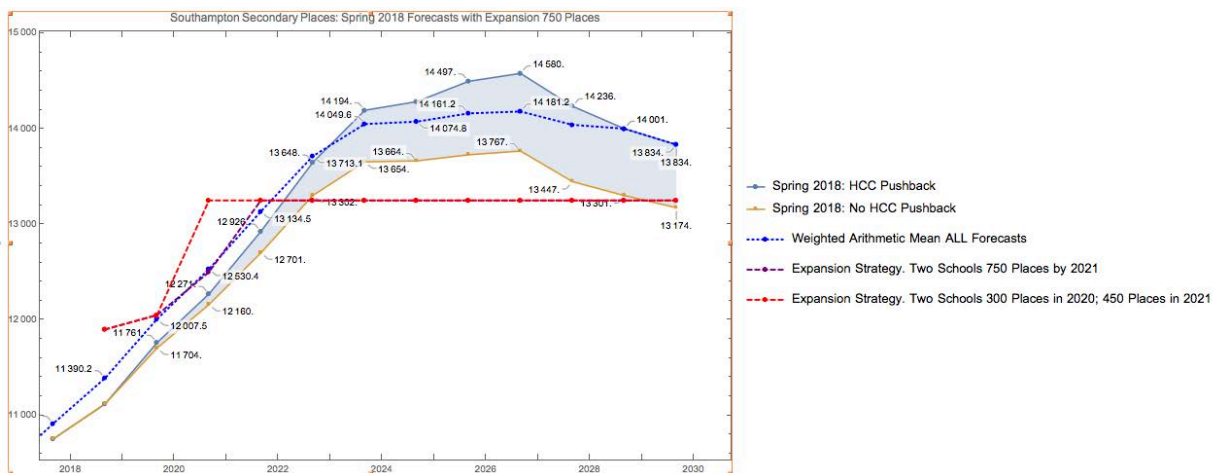


Figure 17.0 Expansion Strategy (750 Places)

5.4.14 From Figure 17.0 the resultant capacity from an expansion only strategy takes the overall capacity across the three regions to 13,300 places. As illustrated this is clearly below the minimum predicted demand curve from the latest forecasts and is significantly below the best fit trajectory in blue.

5.4.15 New Build Strategy. Figure 18.0 illustrates the resultant capacity gained from building a new 6FE (900) place school in the City. Given the supply of land in the City and after careful consideration of several sites the availability of a site of sufficient size to build a larger school in the required time frame has been ruled out.

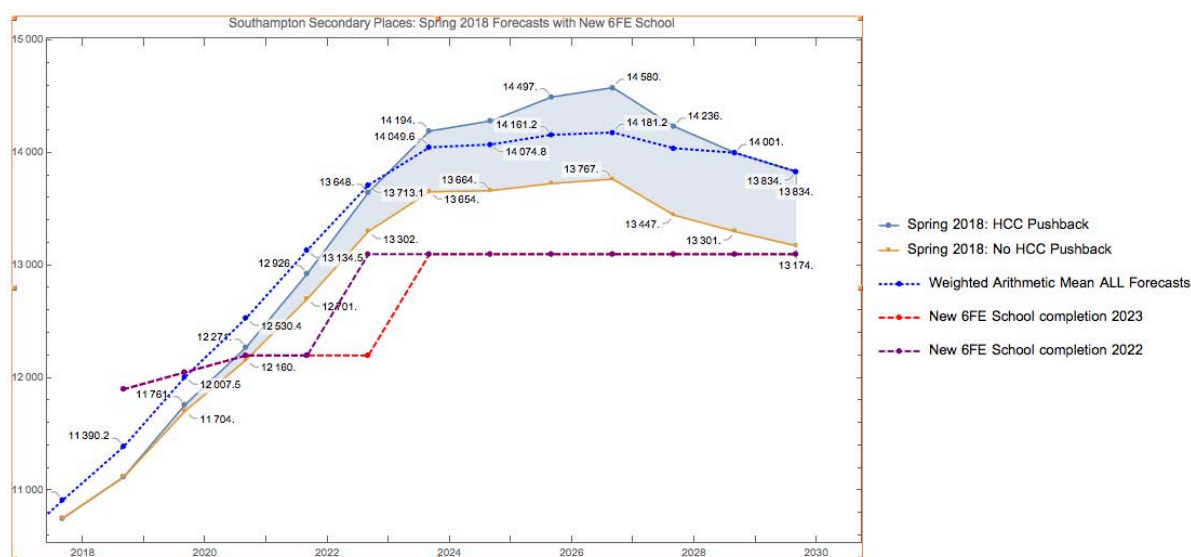


Figure 18.0 New Build Strategy 6FE (900 Place) School

5.4.16 The resultant capacity from a new 6FE school would be 13,200 places. This falls below the minimum predicted demand (without Hampshire Pushback) and well below the best fit trajectory. Further the additional capacity arrives too late as the earliest a new school can be delivered for is September 2022.

5.4.17 From Figure 17.0 and 18.0 it can be concluded the City needs to expand existing schools to meet the gap in places in 2020 onwards and requires a new 6FE school by 2022.

5.4.18 Figure 19.0 illustrates the resultant capacity from expanding existing schools by 750 places and building a new 6FE school in the city by 2022.

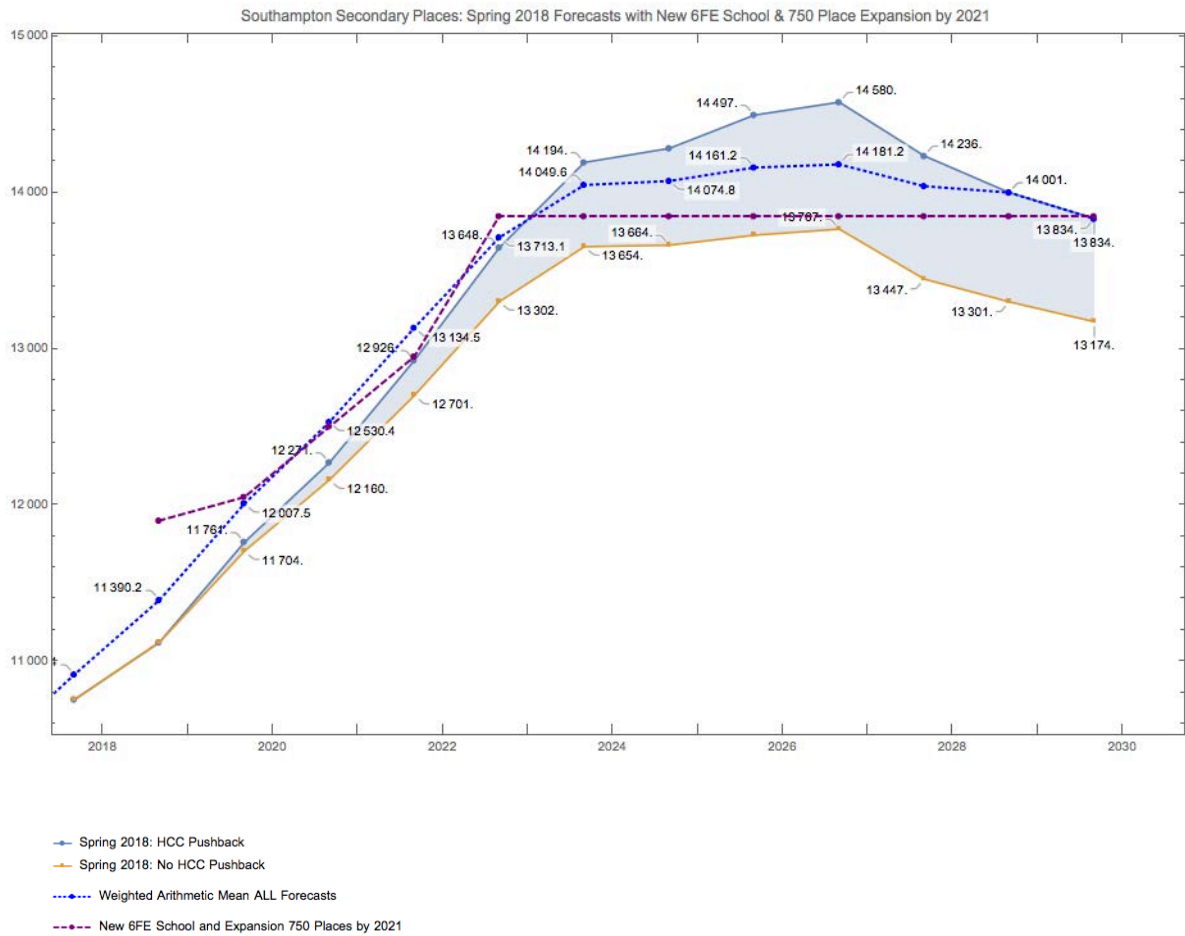


Figure 19.0. Expansion (750 Places) and new 6FE School.

5.4.19 The resultant capacity from expanding existing schools by 750 places and building a new 6FE school is 13,800 places. This brings the final capacity close to the best fit trajectory (blue dotted line) and raises the overall capacity in the short term (to 2021) to above the predicted demand curves.

5.4.20 Figure 20.0 below shows the resultant supply and demand curves if a strategy of expansion of 600 places backed with a new 6FE School is adopted.

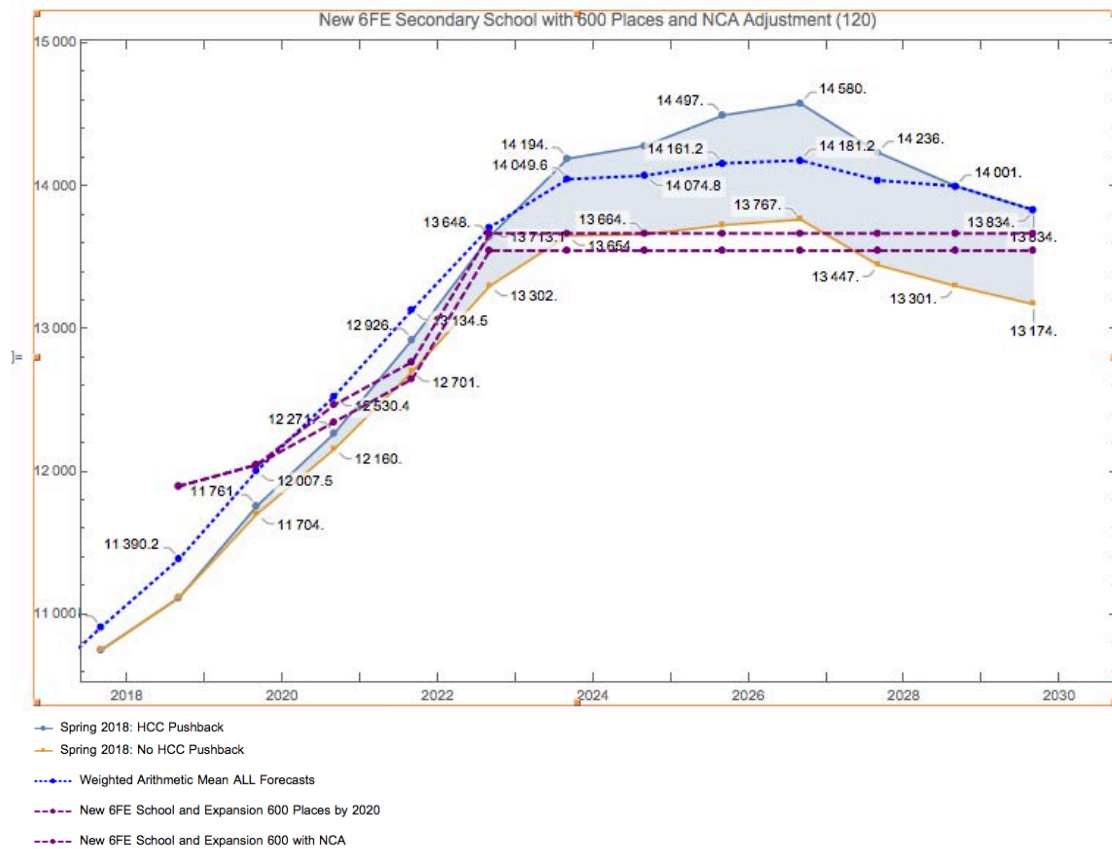


Figure 20.0 New 6FE School with 600 Places (and NCA Adjustment)

- 5.4.21 The resultant capacity from expanding existing schools by 600 places and building a 900 place 6FE secondary school would be 13, 550 places. This would track the lower demand curve to 2023.
- 5.4.22 The PAN for a given school is the statutory admission limit. A 360 PAN school, for example Bitterne Park Secondary School would have a total capacity of 1,800 places. Over and above the admissions limits each school has a Net Capacity Assessment, (NCA) which is the theoretical limit of the accommodation.
- 5.4.23 The programme of works to expand Primary Schools used the difference between the PAN and the NCA to create additional places. A modest assumption is made here an additional 120 places can be gained from better use of existing accommodation.
- 5.4.24 If the City adopted a strategy of expanding by 600 places with some additional capacity from better use of accommodation in schools then it would clear the short to medium term pressure for places (to 2023) without running the risk of over supply if the Hampshire Pushback does not materialise or partially materialises.

5.4.25 The extent to which the Hampshire Pushback materialises or might materialise can be reassessed in the early 2020's and a strategy to increase places further be determined then.

5.4.26 **R5.** The recommended strategy for the City is to expand by 600 places, ensure maximum use of existing accommodation and build a new 6FE (900) place Secondary School.

5.4.27 Adopting this strategy will (i) mitigate against the risk of over supply of places and represent VfM, (ii) meet demand for places into the mid 2020's and (iii) provide the City with the opportunity to assess the real impact of the Hampshire Pushback. Further it will provide sufficient time for Government to announce proposals for future funding of school places, (i.e. unfreeze Wave 14 of Free School Applications or shift policy)

5.5 Short to Medium Term Analysis of Demand

5.5.1 Having established a best fit strategic direction for the City it is necessary to consider where the increased demand manifests itself in the City.

5.5.2 The reliability, accuracy and stability of the forecasting methodology has been verified as detailed at Table 1.0 on page 14 of this report therefore the use of the forecast data to model supply and demand over a five year period is accurate to 90% confidence.

5.5.3 Figure 21.0 shows the demand for Year 7 places by Planning Region based on a scenario of expanding one school in the West Planning Region and another in the Central Planning Region.

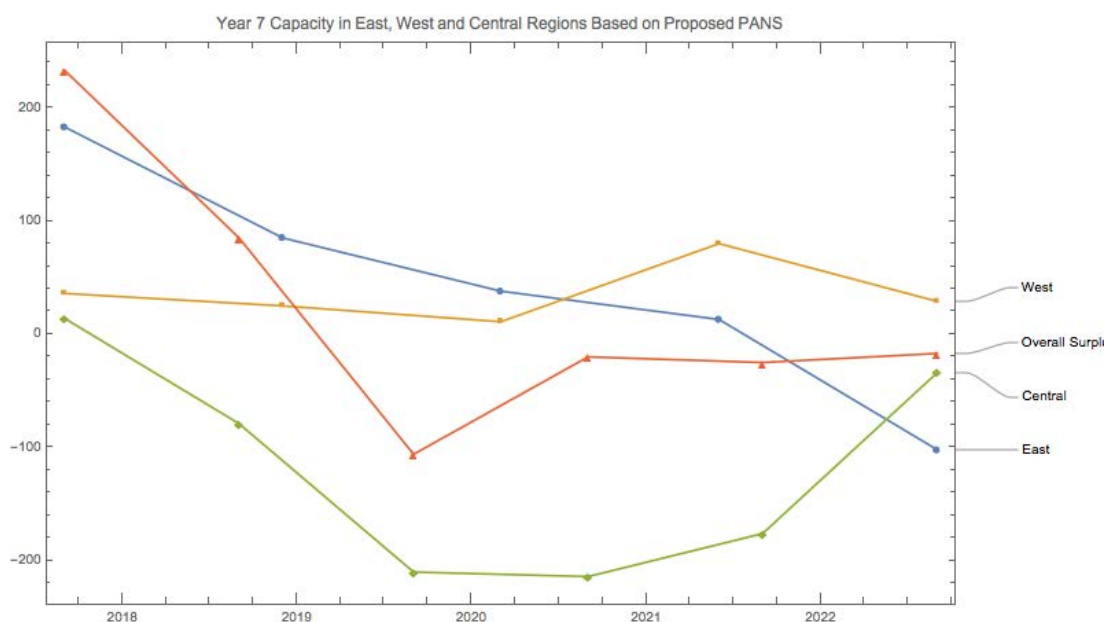


Figure 21.0 Year 7 Demand by Region 2018 to 2022.

- 5.5.4 The predicted shortfall in capacity of circa 100 Year 7 places in 2018 did not materialise; not because the forecast was wrong but because there has been sufficient capacity in the overall system to absorb any shortfall of Year 7 places in the Central Region. This overall surplus of Year 7 places runs out in 2019.
- 5.5.5 It should be noted the Number on Roll, (NoR) at Oasis Lordshill Academy in September 2018 is 604. The overall capacity in the school is 900 places (6FE). This provides sufficient capacity (296 places) to absorb any short to medium term pressure in the West Planning Region and rather than investing in places in the West Region and given finite resources the Council should consider requesting the academy admit over PAN at Lordshill; and invest in expanding schools in the Central Region as it is clear this is where the immediate and longer term demand is. Capacity of 300 places equates to two forms of entry.
- 5.5.6 **R6.** Investment in the required additional places by expansion of existing schools should focus on the Central Planning Region and utilising available capacity in the West to meet demand for Year 7 places in the West until additional capacity is introduced across the system through expansion.
- 5.5.7 Hampshire County Council have confirmed available capacity in their schools in 2019 for Year 7 places so there is reasonable confidence the Hampshire Pushback will not materialise until 2020 and beyond.
- 5.5.8 Section 6.2 sets out the specific proposals to meet the shortfall in places in the Central Planning Region.

5.6 **Southampton Housing Developments (2002 through to 2034)**

- 5.6.1 Historically there have been 16,000 housing completions in the time frame 2002 through to 2015. Approximately 80% of the housing completions in this timeframe were one or two bedroom apartments or flats. The past assumption has been these developments do not impact on demand for school places as the statistical yield from this type of housing is low. This is true. This assumption may well hold whilst there is overall surplus capacity in the system however it needs re-examining as overall surplus disappears from the system.
- 5.6.2 A further factor for consideration is if the housing market supply is predominantly single and two bedroom apartments then young families will to some extent move into the accommodation available and this will over time increase the statistical yield from this type of accommodation, (See R1).
- 5.6.3 Figure 22.0 below charts the total number of Housing Developments across the City in the timeframe 2002 to 2018 (Historic) and to 2034 (Predicted). Figure 23.0 shows the number of historic completions and predicted completions by planning region in the same time frame.
- 5.6.4 The apparent overall trend into the future is for increased housing developments across the City; however the predicted rate of development declines through the 2020's.
- 5.6.5 The predicted numbers of housing developments do not take into consideration 'windfall' or 'opportunistic developments'.

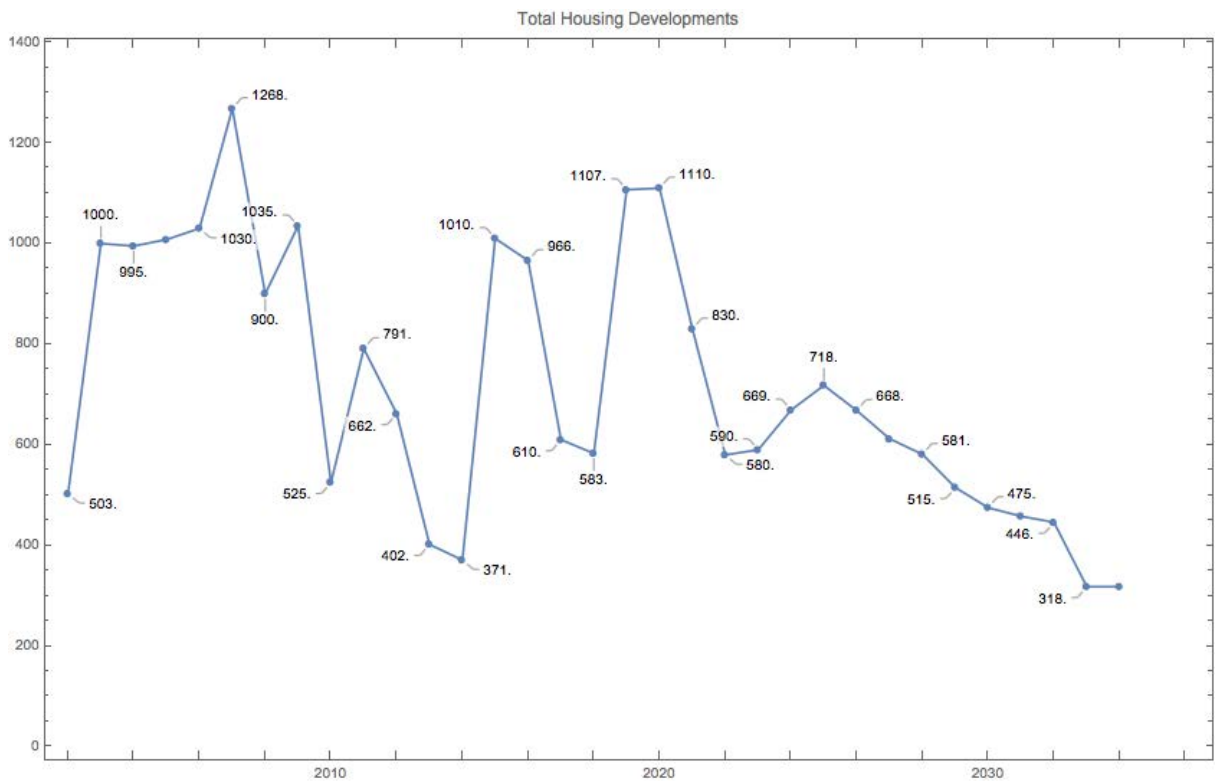


Figure 22.0 Total Housing Developments (All Regions)

- 5.6.6 The historic total number of completions in each year has varied from as high as 1,268 completions in 2008 and as few as 371 in 2012. The actual numbers of developments into the 2020's is likely to be higher than the projected trend shown in the chart above.
- 5.6.7 There is a consistent year-on-year increase in the housing supply in Southampton and this trend is predicted to carry on through the 2020's.
- 5.6.8 Local Authorities take different stances on how to assess pupil yield from new housing developments. Typically some authorities use a figure of around 0.04 yield for single bedroom apartments; based on 80% of 16,000 dwellings this would yield 640 children over the fifteen year timeframe, (or around 42 children a year). Other Authorities will use a ratio of 1 form of entry per 750 dwellings or 500 dwellings, (See R1)
- 5.6.9 Figure 23.0 illustrates the rate of Housing Completions by area. Note the Ward boundaries do not map exactly onto the planning regions. In particular Bassett and Shirley Wards cross the boundaries between the West and Central Planning regions.

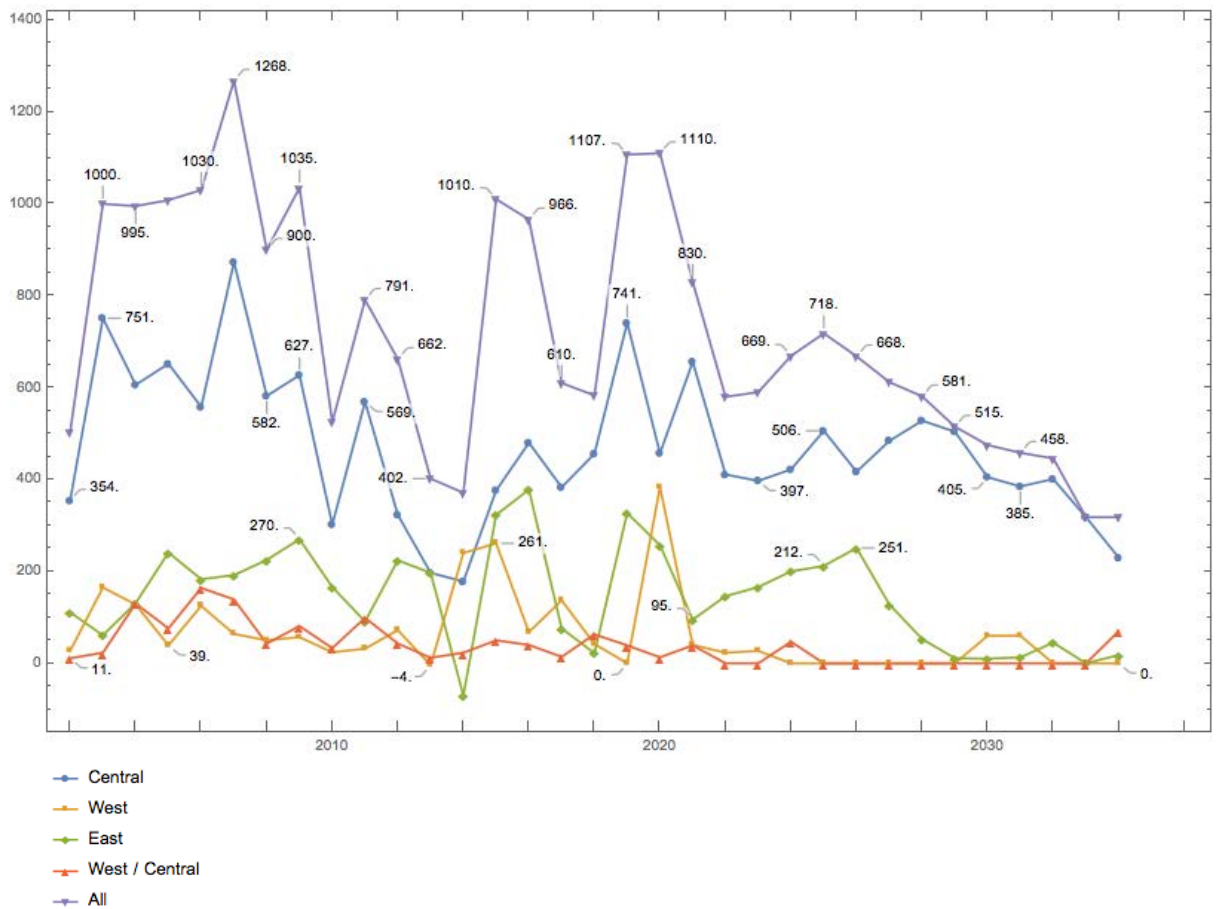


Figure 23.0 Housing Developments by Region (2002 to 2034)

5.6.10 The Central Region accounts for around 75% of all housing completions in the City and this ratio is expected to be maintained through the next decade.

5.6.11 Housing development in the West Planning region accounts for between 10% and 15% of overall developments whereas in the East Planning Region the proportion of housing developments when compared to the total is in the region of 30%.

5.6.12 The relatively low rate of new housing developments into the future in the West Planning Region when compared to the Central Planning Region reinforces the decision to invest constrained resources in the Central Planning Region.

5.6.13 R7. The proposed general strategy for each of the planning regions is:

West: Maximise existing available capacity to meet demand.

Central: Invest to meet shortfall in current demand.

East: Retain existing capacity to meet future demand.

6. Secondary Phase

This section details the proposals to meet the increase in demand for places in accordance with the general strategies set out at 5.6.13 and articulated in R7.

6.0 The East Planning Region

- 6.0.1 The general strategy for the East Planning Region is to retain capacity to meet future demand for places in order to mitigate risk
- 6.0.2 The Sholing Technology College is currently transferring to Oasis Academy Trust and a £2.472m investment has been made by Southampton to improve accommodation. This has been matched by the DfE.
- 6.0.3 *Woodlands School.* The Number on Roll (NoR) at Woodlands Community College in September 2018 is 562 and the overall capacity in the school based on PAN is 900 places. The Net Capacity Assessment (NCA) for the school places the total potential capacity for the school at 1150, (though this requires verification).
- 6.0.4 **R9.** Woodlands School is a PFI school which currently has low levels of occupancy. Southampton are paying a premium for accommodation in the school. Long term demand for places (Figure 16.0, Page 23) will ensure this capacity is fully utilised. In the interim the City should explore all viable means to increase occupancy in the school to increase VfM and to reduce the PFI burden on the school. This includes the potential to utilise space in the school for secondary SEND provision.
- 6.0.5 *Chamberlayne College for the Arts.* As with Woodlands the current Number on Roll (NoR) at the school for September 2018 is 414 and the capacity of the school based on a PAN of 180 is 900. The school under the leadership of the current Head Teacher is clearly on an improvement trajectory and whilst it is currently subject of a direct academy order the City needs to recognise the strategic importance of a school on this site and its role in mitigating the future potential risk associated with the materialisation of the Hampshire Pushback in the East of the City. Regardless of whether the future of the school lies with Southampton City Council as an LA maintained school or with an Academy the school needs support whilst numbers are low.
- 6.0.6 **R10.** The City will need to support Chamberlayne College for the Arts whilst NoR are low; in revenue terms a viable school requires a cohort of 600 children. It is anticipated numbers at the school will increase to a viable level by 2022 as a result of the increase in demand for places across the City and in the east of the City.
- 6.0.7 An analysis of the predicted Housing Developments in the Woolston Ward indicate there are over 1,100 new houses planned for completion in the timeframe 2020 through to 2028, (Figure 24.0). The projected future number and rate of housing developments in the Ward are the third highest in the City in this time frame. Projected Housing Developments in the Woolston Ward account for around 80% of all planned developments in the East Planning Region.

6.0.8 **R11.** To address the poor accommodation at Chamberlayne College for the Arts and to enhance the attractiveness of the school it is proposed to invest £8m in providing a full and deep refurbishment of the Main Teaching Block and to improve the sports facilities at the school.

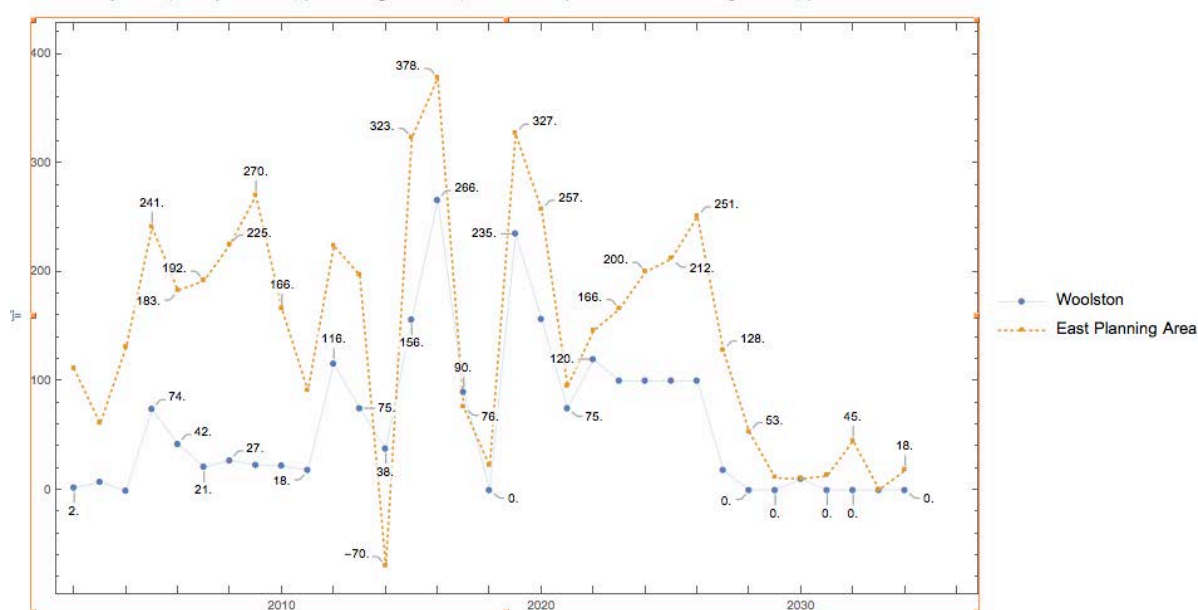


Figure 24.0 Woolston Ward Housing Developments (to 2034)

6.1 The West Planning Region

- 6.1.1 The general strategy for the West Planning Region is to maximise the use of available capacity at the four schools.
- 6.1.2 Upper Shirley High School. Hamwic Academy have increased the PAN of the school to 180 (900 Places) and the new buildings will be completed by September 2018. The logical connections between the feeder schools and Upper Shirley High (See Figure 8.0) effectively [and unintentionally] isolate the school from the overall network of schools in the City to the detriment of the Academy and the Authority.
- 6.1.3 Regents Park Community College. Improvement works have commenced to refurbish and modernise the Design Technology Classrooms, reconfigure the toilet facilities in the school and improve the sports facilities. The £4.2m scheme is now entering the technical design stage and will complete in stages from September 2019 to 2021.
- 6.1.4 The PAN at Regents Park Community College is currently 150 (750 Places). The Net Capacity Assessment, (NCA) for the school is calculated as 946 places. The current NoR for September 2018 is 764. The constraint on space at the school has largely been caused by the conversion to a co-educational school from a single sex school.

6.1.5 **R12.** The City Council shall ensure the programme of improvement works at Regents Park Community School will maximise the Net Capacity of the school in order to maximise the available capacity in existing schools in the West Planning Region.

6.1.6 Figure 25.0 illustrates the relatively low levels of predicted Housing Developments in the West Planning Region when compared to the Citywide figures.

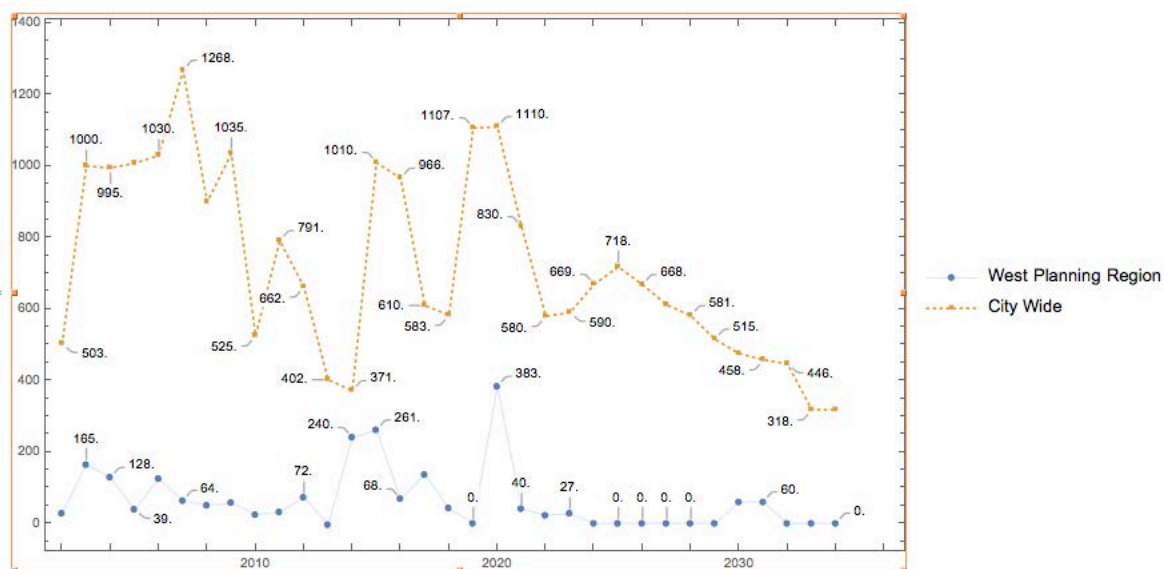


Figure 25.0 Housing Developments in the West Region (to 2034)

6.1.7 Oasis Academy Lordshill has 604 children (NoR) in September 2018 and a capacity of 900 places. The school is operating at a capacity of 2/3rd

6.1.8 **R13.** The City will engage and work with Oasis Academy Trust to maximise the capacity within the school to support demand for places in the West Planning Region.

6.2 The Central Planning Region

6.2.1 The strategy for the Central Planning Region is to commission the necessary works to meet demand for secondary places, (Figures 15.0, 21.0)

6.2.2 The identified requirement is for the creation of 1,500 new places in the Central Region.

6.2.3 This will deliver sufficient places to meet short to medium term demand (to 2023).

6.2.4 **R14.** The Council support the requirement to build a new school in the Central Planning Region based on the rationale and analysis provided in this Programme Brief and approve the £31.86m investment required to deliver this.

- 6.2.5 A survey of suitable sites in the Central Planning Region has been undertaken. Given the need to deliver a new school by 2022 a viable site has to permit the full design, procurement and construction of the school within this timeframe.
- 6.2.6 The prime site identified for the proposed new 6FE Secondary School is the St. Marks Primary School and Civil Service Playing Fields. A feasibility study has been undertaken to (i) determine if a school can be built on this site and (ii) identify potential options (Annex B).
- 6.2.7 The two viable options identified on this site are Option 1 and Option 2 as set out in the feasibility study.
- 6.2.8 **Option 1.** Within the existing site part demolition, extension and refurbishment of St. Marks Primary School a new Secondary School and a separate Sports Hall. (Estimated Cost £29.793m)
- 6.2.9 **Option 2.** Within the existing site the demolition of the existing Primary School and the construction of a new Primary School and the construction of a new secondary school, (Estimated Cost £31.86m)
- 6.2.10 Initial discussions with the school and diocese have taken place. The importance of retaining the identity, values and ethos of St. Marks Primary School have been recognised.
- 6.2.11 **R15.** Council provide assurances for St. Marks School and the Diocese that the identity, ethos and values of the school will be preserved [and enhanced wherever feasible].
- 6.2.12 **No further work on the proposals for a new school will take place until Cabinet and Council have endorsed the recommendations in this report.**
- 6.2.13 A full risk workshop and analysis has taken place and at this stage the project is considered viable.
- 6.2.14 Early dialogue has taken place with the Regional Schools Commissioner in relation to the need for a new school in the City. The RSC have offered support in developing the specification for the school and offered assistance in securing potential partner(s) to run the school.
- 6.2.15 **R16.** The proposals for the new school if endorsed by Council move forward on the Presumed Route and the Council needs to fully acknowledge the risk of funding and commissioning the new school sits with the Council.
- 6.2.16 **R17.** If and only if a Free School bid is secured at a later stage would it potentially bring in external funding for the construction of a school. At present Free School Applications are frozen and the date for Wave 14 of Applications has yet to be announced by Government. If a successful free school proposal were secured all investment prior to this proposal are at the Council's risk.
- 6.2.17 **R18.** The Education service will engage with all stakeholders in formulating the full specification for the new school; this shall include the Diocese, St. Marks School, Schools Forum, Head Teachers, The Regional Schools Commissioner's

office, the DfE and ESFA. The specification of the school will set out the ethos, values and aspirations in line with the vision and needs of the City.

6.2.18 No recommendation is made at this stage in terms of whether the proposed school will be an all-through school or a co-located school and no recommendation is offered at this stage as to who or how the school will be run. This is open to discussion with all stakeholders subject to Council approval of this Programme.

6.2.19 Some of the potential advantages of an all-through school are bulleted below:

- All-through schools allow the progress of a child through key stages 1 to 5 to be monitored continuously and seamlessly in the same setting
- All-through schools allow primary age children access to curriculum resources not available in a standard Primary School setting. Offering access to secondary phase resources, curriculum and facilities
- Providing improved opportunities and personal development for teaching staff
- Provides security and continuity for children as they progress through

6.2.20 As there are only three schools in the Central Planning Region options in terms of expansion are limited. Cantell School is a PFI school and any works to expand this school would have to be progressed as a variation on the PFI contract. There is insufficient time to achieve this by 2020.

6.2.21 **R19**. The Authority should approach St. George Catholic College and St. Anne's Catholic College in order to seek agreement with the Academy trust, Diocese, Governors and Head Teachers to provide the additional capacity at these schools at a total cost of £9m.

6.2.22 Delivery of 300 additional places is required by September 2020. The most feasible approach to achieving this is to utilise a solution involving modular construction techniques. This should NOT be confused with modular buildings. Modular buildings have a typical design life of around 50 to 60 years.

6.2.23 A further 300 places are required by 2021. Time is saved by off-site construction. Buildings are delivered to site and assembled on site. Providing a quality solution in a short time frame.

6.2.24 There are challenges associated with expanding accommodation at St. Anne's. There would be several strategies to consider (i) acquisition of land behind the temporary classrooms on site, (ii) supporting or contributing to a scheme to replace the existing gym block or (iii) acquisition of premises close to the school.

6.2.25 **R20**. In order to accommodate the requirement for additional places in September 2019 and to provide accommodation during construction the Authority should consider the hire of double classroom units.

7 Education Capital Programme Blueprint

7.1 *Programme Vision.* To be developed with all stakeholders subject to Cabinet and Council approval. Placing Education at the heart of the programme.

7.2 *Programme Governance.* The recommendation is for the Education Capital Programme to be governed by a Programme Board with representation from:

- Legal Services
- Communications
- Capital Assets
- Education
- Schools
- DCS
- Procurement
- Finance

7.3 The Programme Board will report to Council Capital Board and School Forum

7.4 *Programme Structure.* The proposal is to structure the programme around the following work streams or tranches.

7.5 Improvement Projects

7.5.1 St. George Catholic College (PSBP 2)

7.5.2 Regents Park Community College

7.5.3 The Sholing Technology College

7.6 Primary Phase On-Going Projects

7.6.1 St. Denys Primary School Refurbishment (PSBP 2)

7.6.2 Valentine Primary School Extension (PSBP 2)

7.6.3 Fairisle Junior School (Extension)

7.7 Secondary Expansion

7.7.1 Expansion in The Central Planning Region

7.7.2 New 6FE (900) Place Secondary School

7.8 **SEND Provision** – subject to feasibility study against options and report to Council and Cabinet.

7.9 **Programme Resources.** The programme will require dedicated key resources.

7.9.1 Programme Office Support. 1 FTE Programme Support Officer

7.9.2 Programme Management. 1 FTE programme manager from initiation to September 2022

7.9.3 Education Strategy. As required.

7.9.4 Capital Assets. Project Management 2 FTE Project Managers to September 2022

7.9.5 Professional Services. To be appointed via Capital Assets

7.9.6 Legal Services. 0.3 FTE

7.9.7 Procurement

7.9.8 Finance 0.3 FTE

8 Education Capital Investment Profile

8.1 Capital Programme

A. Southampton Central Planning Region Expansion (600 Places)	£9.00m
B. Southampton Central Planning Region. New Six Form Entry, (6FE) 900 Place Secondary School & Primary School.	£31.86m
C. Refurbishment of Chamberlayne College for the Arts	£8.00m
Total Programme Costs	£48.86m
Funded by	
D. Basic Need Funding (2018-2019)	(£0.94m)
E. Basic Need Funding (2019-2020)	(£17.73m)
F. SEND Capital Funding Allocation (DfE 2019 -2021)	(£0.80m)
G. Remaining funding in Improvement Fund	(£0.73m)
Total Confirmed Funding	(£20.2m)
Funding Gap	£28.66m
POTENTIAL Funding streams	
Possible Site Disposals	(£0.85m - £2.5m)
Basic Needs Funding for (2021-2022)	March 2019
Basic Needs Funding for (2022-2023)	March 2020
Basic Needs Funding for (2023-2024)	March 2021
Free School Bid for New Secondary School	(£23.00m)

Annex A Forecasting & Demographics

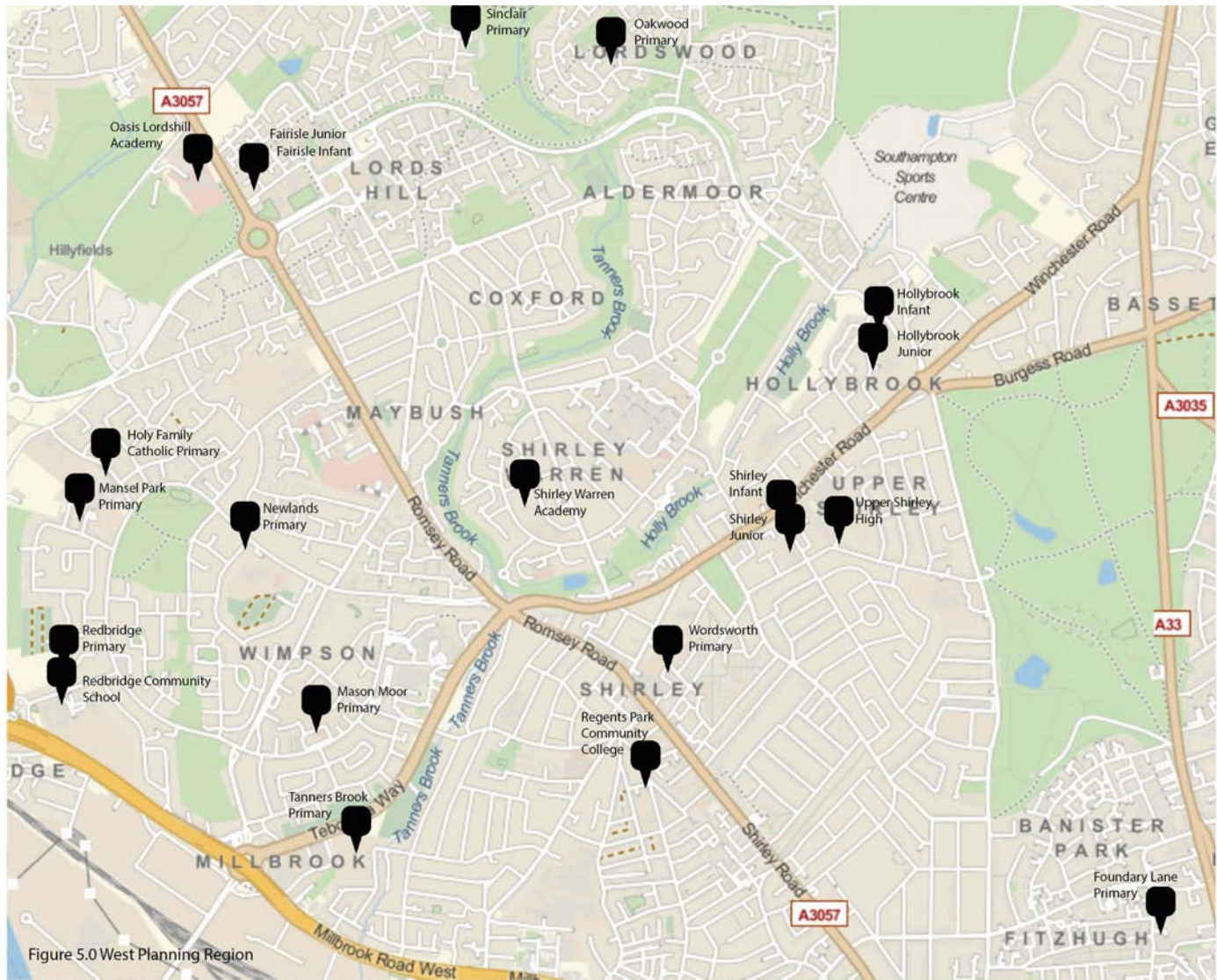


Figure 5.0 West Planning Region

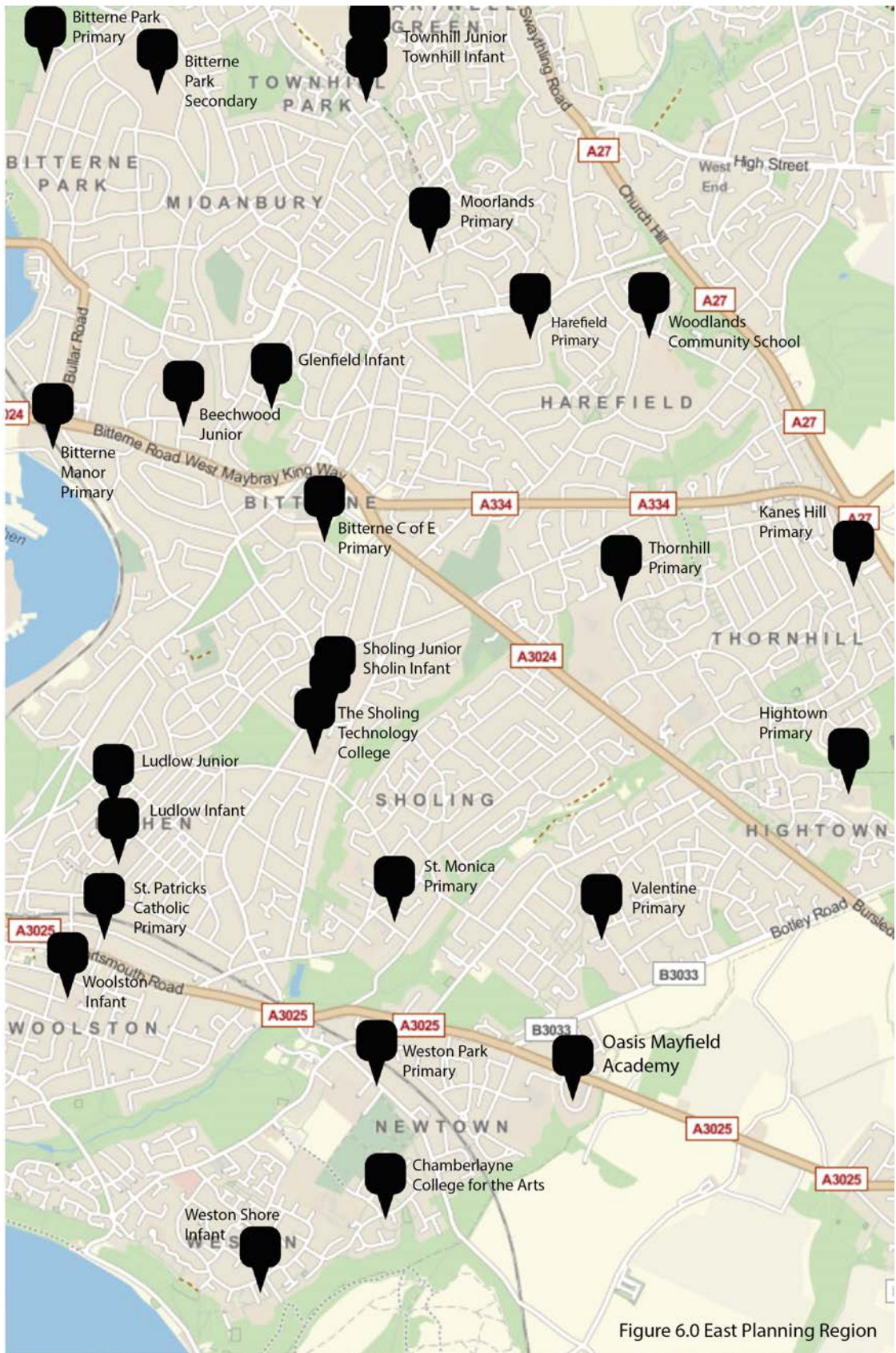


Figure 6.0 East Planning Region

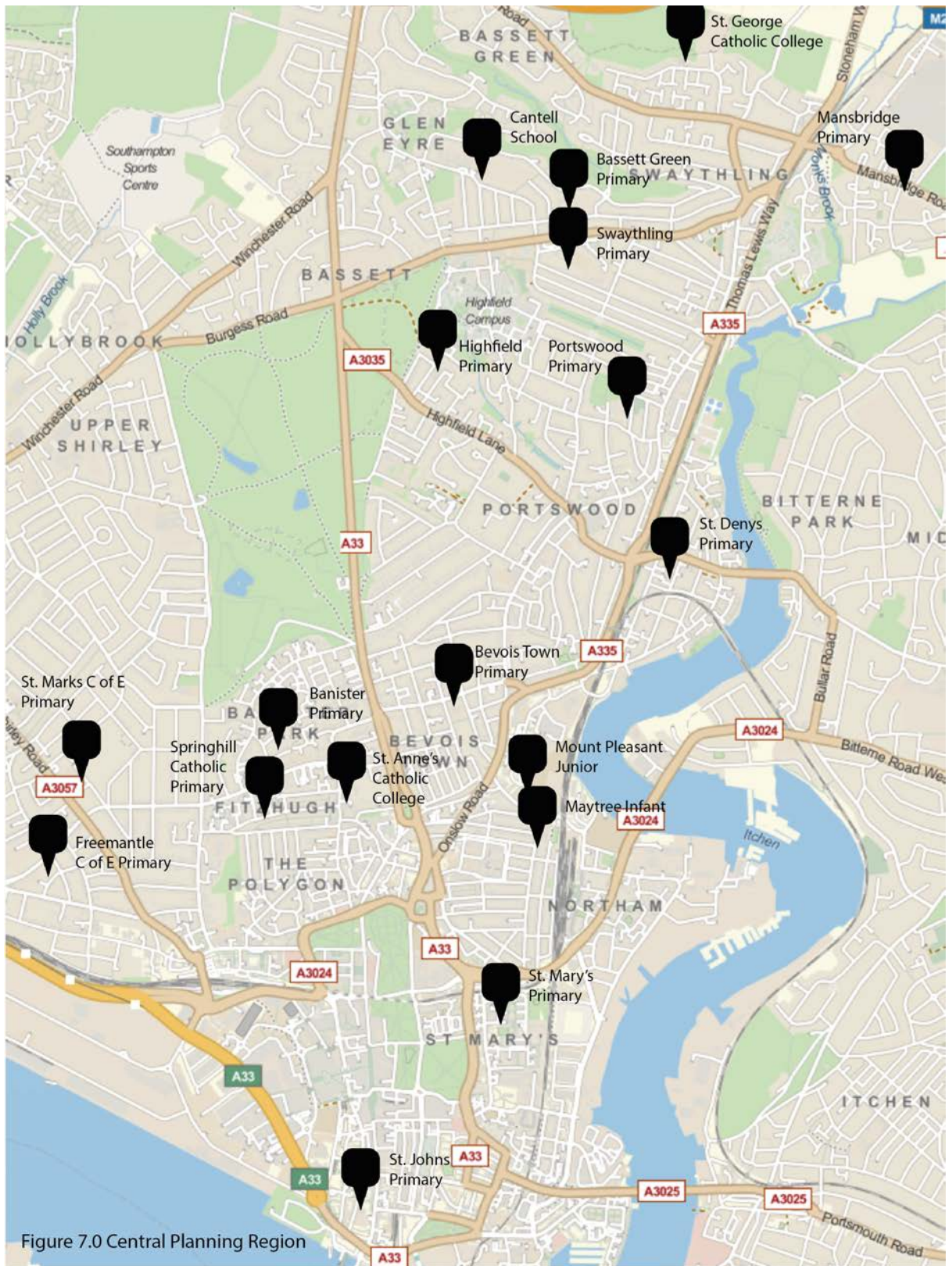


Figure 7.0 Central Planning Region