

**SCHOOL SUFFICIENCY INVESTMENT PLAN**

**Table of Contents**

<b>Introduction And Purpose Of Report .....</b>	<b>2</b>
<b>Stockport Context.....</b>	<b>2</b>
<b>Context Through Three Lenses:.....</b>	<b>4</b>
<b>One: School Place Planning.....</b>	<b>4</b>
<b>Two: Capital Investment And Condition .....</b>	<b>6</b>
<b>Three: Education Improvement And Inclusion .....</b>	<b>8</b>
<b>The Council's Responsibilities .....</b>	<b>11</b>
<b>A Responsive Strategy To Grow And Develop The School Estate.....</b>	<b>12</b>
<b>Challenges .....</b>	<b>12</b>
<b>The Architecture For Governance And Delivery.....</b>	<b>15</b>
<b>Risk Based Priotisation For Investment .....</b>	<b>18</b>
<b>0-5 Years Priorities And Pipeline .....</b>	<b>20</b>
<b>Legal Considerations .....</b>	<b>20</b>
<b>Equalities Impact .....</b>	<b>20</b>
<b>Environmental Impact .....</b>	<b>20</b>
<b>Conclusions .....</b>	<b>21</b>
<b>Recommendations.....</b>	<b>21</b>

## **INTRODUCTION AND PURPOSE OF REPORT**

- 1.1 The Council has an enduring statutory responsibility to commission sufficient high quality school places. This document sets out how we will carry out our responsibility, in line with the commitments made in the One Stockport Borough Plan to ensure there are sufficient places in good and improving local inclusive schools at the heart of the community that children and families want to go to. This means having the right number and type of school places, in the right place, at the right time to meet demand. The school investment plan aims to secure an education estate that provides a safe, accessible, secure and stimulating learning environment, which is sustainable and provides value for money, is fit for current and future needs and reduces environmental impact.
- 1.2 This document, alongside the One Stockport Borough Plan, the Local Plan, the Children and Young People's Strategy, the Inclusion Strategy the CAN Strategy and other associated strategic documents provides a framework on which a school place plan can be devised for short, medium, and longer-term sufficiency and sustainability.

## **STOCKPORT CONTEXT**

- 2.1 Stockport is proud of the quality of education provided by its diverse and high-performing system of schools, colleges, and early years' settings. Stockport is committed to ensuring its residents have access to good local schools which offer a rich and varied learning experience.
- 2.2 Residents have a good choice of schools with high standards; 86% of Stockport schools are rated Good or Outstanding. Furthermore, over 96% of residents have secured a school place at one of their first 3 preferences.
- 2.3 Stockport faces significant challenges in the future due to a growing population (caused by increased housing development and inward migration), condition issues within the school estate, and in line with other local authorities nationally a growing cohort of children with specialised and complex needs.
- 2.4 Funding for capital investment to maintain and grow the school estate remains constrained by the priorities and focus of Government and as such relies on the Council to better seek economies of scale where possible. Funding pressures means greater focus to maximise the benefits from our investment plans. This includes social value, recognising the importance of social, environmental and economic well-being across our communities by developing our educational establishments.
- 2.5 The LA/Schools receive a series of grants from central government relating to capital funding to support maintenance/development and improvement to the school estate in line with both schools and LA strategic plans / core responsibilities (i.e. ensure sufficient school places across the borough).

The funding streams and narrative are as follows:

- Basic need funding; Calculated annually based on the capacity of schools in the Borough versus the number of pupils the authority expects to be in each year group/each school/each planning area.
- School Condition Allocation; Calculated annually based on pupil numbers in the Spring census. Pupils are weighted according to early years, primary, secondary and sixth form and paid between £115 - £146 per weighted pupil. The Council is only funded for maintained schools, academies receive their own allocation.
- School rebuilding programme; Government programme funding and delivering the rebuild of 100 schools nationally. Decisions are made based on centrally held data on condition and Government priorities.
- Special provision fund capital allocations; Government grant intended to improve special provision for children and young people with Education, Health, and Care Plans. Allocations are calculated based on demographic growth and local building costs.
- High needs provision capital allocation; Government grant intended to support the provision for children and young people with Education, Health, and Care Plans and those pupils requiring alternative provision. Calculated based on local growth in demographic compared with national growth and funding proportioned across all LAs
- Developer Contributions; the LA can seek or secure developer contributions where it is felt necessary to make the development acceptable in planning terms (owing to a perceived or demonstrable impact on infrastructure). The LA as yet does not have a formal policy on seeking developer contributions however one is proposed in the forthcoming local plan.

2.6 In addition to the direct capital grants the LA has recently been successful in receiving additional central government grant for a new secondary special free school and direct Section 106 developer contributions for the Woodford site, this provides:

- a new c.140 place secondary free school on the former Orrishmere site in Cheadle Hulme area from Easter 2023; and
- a new 1FE primary school in Woodford from September 2022.

## CONTEXT THROUGH THREE LENSES:

### ONE: SCHOOL PLACE PLANNING

#### 3.1 Key Influences

There are a number of factors that influence strategic thinking on sufficiency solutions put forward for capital investment. These are kept under regular review and include:

- Fluctuation in forecasted pupil numbers.
- The Local Plan outlining development plans for Stockport over the next 17 year period (many of which are still 'emerging') and the phasing and timing of actual housing developments and the availability of sites for new school provision (services, access, infrastructure).
- Inclusion strategies which influence the type and level of resourced, alternative and specialist provision and influence SEND numbers in mainstream places.
- Changing patterns of growth in mid-year migration.
- Academisation agenda
- Schools and Academies adjusting their Published Admission Numbers or capacities.
- Cross border migration patterns and delivery solutions.
- Changes to admissions arrangements.
- Project viability, cost, school site limitations in terms of size, accessibility, planning/highways considerations, geotechnical constraints, asbestos etc.
- Home to school transport.

3.1.1 Of these, the factors that present the greatest challenge to Stockport over the next 5 years are:

#### 3.1.2 A drop in accessible capacity due to schools and academies adjusting their Published Admissions Number (Admission limit).

3.1.3 A fundamental requirement for any Council wanting to assure sufficiency is that its school's hold surplus school places. Surplus places need to be held by schools to absorb margins of error in pupil forecasting and inward migration. Stockport aims to achieve and hold between 6-8% surplus places. This means 6-8% of the total school capacity distributed as evenly as possible across the Borough.

3.1.4 Schools are finding it incredibly difficult to hold surplus places for the Council and for its residents. A combination of pupil funding, parental preference for schools other than their local school, regulations that govern admissions mean that those schools that do hold vacancies:

- Struggle to forecast budgets due to in-year transfers affecting pupil numbers meaning the size of their pupil population is constantly changing
- Because they hold vacancies some schools experience much greater turbulence in the numbers

- As a consequence of the above schools prefer to operate with a slightly smaller staffing establishment than is expected to ensure financial sustainability.
- As a consequence of a smaller staffing establishment, these schools struggle to offer a broad and varied offer often due to a lack of specialised teaching and support staff
- This can be detrimental to a schools improvement plans as challenges confound

3.1.5 Own admission authority schools (Academies, Voluntary Aided etc.) are able to reduce their admissions limit. By reducing their admission limit a school can reasonably guarantee that they will fill or have fewer vacant places. Schools that are full or have low numbers of vacant places can better plan due to stability and predictability of funding and staffing requirements.

3.1.6 In the last 3 years, the Council has lost 80 school places per year group, 400 in total across the secondary phase as a consequence of own admission authority schools reducing their admissions limit attempting to assure their funding, standards and offer to pupils.

3.1.7 Whilst the Council is responsible for place planning, we do not have powers to instruct schools to expand. This means that good relationships with school leaders are essential as is very well-planned strategic view of our place planning needs.

3.1.8 In total, Stockport is predicted to face a shortfall of 1000 places in the secondary sector, 200 per year group, over the next 5 years. The Council with its partner schools and academies must be able to plan together to assess and agree potential solutions to assure sufficiency.

### **3.1.9 The Local Plan**

Following Stockport's departure from the Greater Manchester Spatial Framework (GMSF), work is currently underway to develop a new Local Plan for Stockport. The Local Plan will act as the land use plan to deliver the vision set out in the One Stockport Borough Plan and will be used to assess planning applications once adopted. The Local Plan provides both a challenge and opportunity for Stockport in terms of its school place planning strategy.

3.1.10 Through the Local Plan, the Council is required to allocate land for new employment and housing development. Based on a national methodology, the Council is required to identify potential land for approximately 18,000 new homes between 2021 and 2038. An overarching principle of the plan is to make sure that the right social infrastructure is also planned for and provided to support both new and existing communities. In simple terms, the potential housing growth is equivalent to needing 4 new primary schools and 1 new secondary schools over the next 17 years to provide school places for new families. The challenge faced by the Council is to accommodate this growth and identify sufficient land (and transport routes) for education purposes, whilst programming the delivery of new places in such a way that it does not undermine the viability of existing schools.

3.1.11 The opportunities the Local Plan brings to Stockport include:

- the chance to reprofile education provision to reflect the diverse communities across the borough, their vulnerabilities and complexities, and anticipated areas of growth.
- the opportunity to realise increased and maximised capital funding streams from basic need funding and developer contributions and targeted use of social value benefits from procurement activity
- the opportunity to leverage economies of scale and make investment more efficient by allowing capital projects to span both basic need, condition, and education improvement
- the opportunity to invest in local academy trusts, to increase their capacity and sustainability, as well as an opportunity to attract high quality sponsors

### **3.1.12 Home to School transport.**

The Home to School Transport Budget comprises an annual grant which is under constant pressure.

3.1.13 When considering the strategic need for additional school places in an area the transport implications are key to determining the locations of solutions and considering the cost / benefit of those solutions. Where solutions do not address a local need and transport must be provided, Stockport would be obliged to meet the cost of the transport.

3.1.14 Reasonable walking distances are defined in law as 2 miles (to and from school) for a child under the age of 8 years and 3 miles (to and from school) for child over 8 years. The statutory walking distance is reduced for children of low-income families. Stockport also holds a statutory responsibility to assist children getting to and from school whose special education needs and/or disability (SEND) impact their ability to safely travel to and from school, even if accompanied.

3.1.15 Currently Stockport pays £500k for children attending mainstream provision to attend school since their local, nearest suitable school is full. A further £3.5m is spent assisting children with SEND attend school.

## **TWO: CAPITAL INVESTMENT AND CONDITION**

### **3.2 The effects of poor or irregular maintenance**

Poor or irregular maintenance of school buildings can result in:

- disruption of education
- closure or partial closure of your buildings
- invalidation of insurance
- poor value for money
- unnecessary expenditure to rectify problems which could have been avoided
- shorter building life
- risks to the health, safety and welfare of building users
- legal claims

- non-compliance with regulations

### **3.2.1 Stockport's capital investment responsibilities**

Stockport has direct capital investment responsibility for 76 schools from nursery to secondary, of which at least two-thirds are over 50 years old.

3.2.2 The majority of these schools need work inside and out to bring fabric and utilities (lighting, heating, electrics) up to an adequate standard. The priority over the last few years is that investment has been focused on work needed to maintain the schools in daily operation, such as roofs and heating systems.

3.2.3 Our school estate has a predicted £105m backlog maintenance requirement that is putting severe pressure on our schools and can act as a barrier to achieving the best learning experience and outcomes for our children and young people across Stockport.

3.2.4 As part of our Climate Action Now strategy we are putting climate change at the heart of everything we do. The quality, design and use of our school buildings across Stockport must be improved to address the challenges we face.

3.2.5 Maintenance, repair and replacement relating to the fabric of and utilities in school buildings also opens up opportunities to assess the energy efficiency of schools allowing us to make decisions that will contribute to the Council's climate action ambitions.

3.2.6 The Capital Programme, which includes the planned spending on education infrastructure over the next 5 years, is published annually in the Asset Management Plan and should be read in junction with this report.

### **3.2.7 Capital plan delivery**

3.2.8 Stockport has a professional in-house Infrastructure Delivery Team. The team assist the development of school expansions and new schools by undertaking viability studies and then leading on the delivery of the capital projects through to completion. Through the work of this team school building projects are delivered to a high standard and at good value, ensuring the best outcome from the investment of public funds.

3.2.9 The Council is currently delivering £11.7M of maintenance and £2.6M Basic Need investment projects in 21/22 financial year.

3.2.10 There is also available forward funding of £14.6M for future identified condition related projects and £10.3M for Basic Need. This funding has not yet been allocated and therefore brings scope to address more of our backlog and strategic investment in the very short-term. It also allows us to consider how to use the benefits of capital procurement exercises to maximise social, environmental and economic social value by leveraging investment to address local social disparities (heightened by Covid-19) and delivery on the Climate Action Now initiative in line with the Borough Plan.

- 3.2.11 Stockport uses a mixture of funding sources to finance additional school places. Funding sources available include Basic Need grant from central government; Section 106 contributions from developers; Free School funding from the Education and Skills Funding Agency (ESFA) and contributions from schools. New school places must be funded through these means as Stockport has no other grants or funds dedicated to providing school places.
- 3.2.12 Opportunities to access other forms of investment, such as the School Rebuilding Programme and Public Service Decarbonisation Scheme are necessary supplements for the school estate to be maintained, however, these initiatives are currently constrained by the focus and priorities of Central Government which do not always show Stockport as a priority for funding.

### **THREE: EDUCATION IMPROVEMENT AND INCLUSION**

#### **3.3 Operational efficiency, effectiveness, and excellence**

The Children's transformation programme builds on the journey of integration that has taken place since 2012 to put children and families at the heart of service delivery. It aims to realise the Stockport One Borough Plan with an emphasis on prevention, early help, strengths and asset-based approaches, community capacity building and neighbourhood working and as such draw demand downstream giving the greatest potential for meeting needs earlier and resultant reduction in spend. It is informed and underpinned by two key strategic reviews which have taken place over the last two years:

- A strategic review of Stockport Family and education services to align and focus education and family support with key core essential services including schools, education services, employment and training services, housing support and children and young peoples' community health services to maximise resources whilst reducing overall spend. This review identified areas of best practice, duplication and opportunities for integration.
- A review of the Dedicated Schools Grant (DSG) high needs block to ensure that Stockport has a clear and consistent funding framework; sufficient specialist inclusion and SEND support services; spend is sustainable within the DSG high needs budget; to support our understanding of demand and sufficiency; and to ensure positive outcomes for our vulnerable and SEND young people.

3.3.1 This resulting new delivery model is based on the foundation of a locality based integrated service and was coproduced with a variety of stakeholders including schools and voluntary and community sector partners. It focused on:

- An integrated operational team in each locality with common purpose.
- Co-production with people and communities to ensure the best public service offer for children and families
- One family plan – a single holistic plan
- A single point of contact for families (key worker/lead professional model).
- All key partners being appropriately trained and informed to support improved outcomes for all children and young people in particular those with vulnerabilities and SEND.



- Clear pathways to support families.
- All processes of assessment and sharing of information being conducive to supporting improved outcomes for children and young people.
- Strengthening our inclusion agenda for all vulnerable young people including those with SEND
- Effective earlier intervention for families preventing escalation to high needs placements.
- Appropriate, context specific and (where relevant) joint commissioning for children and young people.

3.3.2 To realise this ambition and delivery model, services will be organised around geographical delivery footprints to be bespoke and specific to respond to need and demand of the geographic community. This will involve aligning delivery arrangements for children closer to where they and their families live, and where they learn and play. This is fully in line with the expectation of an Integrated Care Systems model and neighbourhood delivery approach. This will enable children to receive services and support in the locations that make sense to them; providing better continuity of support and enabling the use of data to gain insight for a fuller picture of need and service provision in each locality.

3.3.3 This is now being implemented in a phased approach to September 2022. The aspiration is that it will support schools as anchor organisations to have an important and significant role in their communities. This could lead to more families wanting their children to attend their local school. In time bringing a level of predictability and sustainability to place planning.

3.3.4 This delivery model will support a focussed approach to inclusion in the defined geographic footprint as schools work collaboratively to support inclusion. It will also support a better understanding of community needs through robust data and intelligence gathering which will enable the prediction of 'types' of needs and associated educational place numbers – mainstream, alternative, resourced and special.

3.3.5 **Special Educational Needs, and Disability (SEND)**

Stockport must consider the full educational journey of all of its residents and ensure that all learners have the opportunity to access rich, varied and expansive learning experiences to achieve their full potential and prepare for adulthood and independence.

3.3.6 The full scope of delivery spans from early years through to post-16 and up to the age of 25 for those with an Education, Health and Care plan.

3.3.7 Stockport currently has a blend of graduated provision to meet the needs of all its pupils.

- **Mainstream** – pupils are supported in class having their needs met by a class teacher or teaching assistant
- **Mainstream (SEN support)** - pupils are supported within mainstream classes and may need additional support with their learning

- **Resourced** - pupils attend a mainstream setting but spend over 50% of their time in a support rich environment separate from the mainstream class and receive differentiated learning.
- **Special School** - pupils for whose needs are so significant and complex that they cannot be met in a mainstream or resourced settings.
- **Alternative** - pupils with specific needs or those who would benefit from differentiated learning. This provision offers appropriate placements for pupils who would not receive suitable learning due to exclusion, illness or other reason. This also applies to pupils who struggle to engage with an academic curriculum and would therefore suit vocational based subjects (currently Stockport has no vocational provision for children requiring a vocational offer).

3.3.8 Currently approx. 12% of the pupil population has a special education need or disability, of which 4% of the pupil population has an Education, Health and Care Plan which has been historically higher than regional and national levels. The number of pupils with SEND is projected to grow (upper limit) by 2.85% (approx.56 pupils) each year for at least the next 5 years.

3.3.9 The profile of types of SEND (primary need) is changing with children with Social, Emotional and Mental Health (SEMH) or Autism Spectrum Disorder (ASD) accounting for a greater proportion of children each year (increase of 2.9% and 1.2% respectively each year) whereas Speech, Communication and language Needs (SCLN) is decreasing in relative proportion (decreasing by 2.2% each year).

3.3.10 The historic and current offer within the specialist, alternative and resourced provision is not sufficient for those with more complex SEMH and ASD needs and has led to the commissioning of external school places.

3.3.11 As well as profiles of size and need changing for pupils with SEND, localities contributing the greatest proportion of pupils have changed. Edgeley, Stockport (centre) and Reddish have proportionally higher numbers of children with SEND than other areas of Stockport.

3.3.12 For some children whose needs are significant or complex, it requires a specialised form of provision that cannot always be provided in mainstream schools. The number of special school and resourced places has grown in recent years in both the primary and secondary sector to keep up with demand.

3.3.13 The current 5-year forecast on the need for specialised school places indicates that there are insufficient special school places to meet anticipated need, a shortfall of 130 places in primary and 120 places in secondary. The current profile and location of special, resourced, and specialised places is not sufficiently robust and diverse leading to a greater reliance on expensive special school places.

3.3.14 A greater emphasis on local provision meeting local need is needed, connecting and rooting a pupil within their community. This can be achieved through mainstream inclusion and the commissioning of further resource bases.

- 3.3.15 Inclusive education is education that includes everyone, irrespective of SEND, gender or faith, learning together in our schools, and colleges. The work on the inclusion strategy acknowledges that as well as having inclusion in education, we must also create education and community infrastructure to allow the community a pupil lives in to be inclusive. There is a need to align sufficiency into the wider corporate inclusion agenda.
- 3.3.16 To achieve true inclusion and assure resilience in Stockport, the offer of SEN support, resourced, alternative and specialised places needs to grow and develop, reflecting the changing dynamic across the Borough but also protecting the use of Special School places for the most complex pupils.
- 3.3.17 Using the infrastructure created by the footprint delivery model described above, Stockport must ensure sufficient specialised places exist locally. As a minimum Stockport requires two resource bases (maximum of 12 pupils per base) in Primary phase and one resource base (maximum of 30 pupils per base) in secondary phase within each delivery footprint. This equates to a further 8 resourced bases in the primary phase, attached to existing schools, and a further 3 resource bases in the secondary phase; 168 primary and 210 secondary places.
- 3.3.18 Special schools should sit within the Borough as centres of excellence, places of learning best practice for SEND, with a shifted focus on improving provision, teaching and outcomes across all resource bases in Stockport.

## **THE COUNCIL'S RESPONSIBILITIES**

- 4.1 Effective school place planning is integral to the Council's enduring statutory responsibilities.
- 4.2 Stockport Council has a statutory duty to ensure a sufficiency of school places for its children, this includes to:
- Ensure sufficient childcare is available to meet the Early Years free entitlement as far as reasonably practicable;
  - Ensure sufficient maintained school provision is available to meet the needs of all Stockport children aged up to 16;
  - Ensure sufficient post-16 provision is available for all Stockport children;
  - Give priority at all ages to meet the needs of children with special education needs and disabilities (SEND), learning difficulties and/or disabilities up to 19 (in some cases 25);
  - Support all maintained nurseries, schools and Post-16 provision to function as high-quality, viable and financially efficient services; and to
  - Ensure fair access to educational opportunity and promote diversity and parental choice.
- 4.3 In addition to setting out how Stockport intends to provide a sufficiency of school places, this strategy also intends to support Stockport's key education

and employment objectives as defined below (CYP Strategy and Borough Plan);

- An increase in the percentage of children and young people in Stockport attending 'good' and 'outstanding' provision;
- An increase in attainment at Foundation Stage and progress at Key Stage 2 and 4, so that they are in line with statistical neighbour's data and exceed that of national;
- Close the gaps in attainment and progress for pupils from a deprived background, looked after children, children with Special Educational Needs (SEND), and those who speak English as an additional language, so that they are in line with, or exceed national data;
- Ensuring that students can access a range of suitable post 16 provision to suit their needs and that success rates, match or exceed national data;
- Ensuring that Stockport provides 'local places for local children' across all parts of Stockport and that this strategy accounts for; sufficiency, suitability, standards and parental preference issues;
- Reducing the need for children and young people in Stockport to access 'Home to School' transport services;
- Reducing the number of fixed term and permanent exclusions, in line with Stockport's statistical neighbours;
- Increase school attendance and post 16 retention rates;
- Increase education, employment and training for all 16-25 year olds including those with SEND.
- Engage Schools in design and delivery of high quality school places
- Work together to look at the goods and services we buy to keep the Stockport £ in Stockport and explore opportunities for increased social value, inclusion and corporate social responsibility

## **A RESPONSIVE STRATEGY TO GROW AND DEVELOP THE SCHOOL ESTATE**

### **Challenges**

- 5.1 Stockport schools are some of the lowest funded schools per pupil in England and central funding for maintenance and condition is insufficient.
- 5.2 Our plans therefore reflect how we intend to utilise the funding we have to best effect. We must be realistic with what we can achieve with the funds we have. Any approach must therefore seek to maximise impact, outcomes and value:
  - It must further embed schools in their communities recognising them as anchors and/or hubs
  - It must seek to sustain, underpin, diversify and fully utilise existing schools' capacity. Drawing on the strength and resilience given by the enhanced team around the school (Stockport Family operating model).
  - It must recognise that the quality of teaching, the education offer, and school leadership are as important as physical space in terms of parental preference, school place planning and high-quality sufficiency.
  - Where capital investment is needed, it must seek out opportunities to combine projects to achieve economies of scale, greater inclusion and better value.

- 5.3 Stockport has already articulated its vision for the future. To '*ensure there are sufficient good and improving, inclusive places at local schools that children want to attend.*' (One Stockport Borough Plan [www.onestockport.co.uk/the-stockport-borough-plan/](http://www.onestockport.co.uk/the-stockport-borough-plan/) )

#### 5.4 Response

Our strategy focuses on what can be achieved with our limited funds:

Strategic focus	How we will do this
Secure sufficient funding through central funding streams and developer contributions.	<ul style="list-style-type: none"> <li>- Use our strong understanding of historic trends to predict future needs</li> <li>- Use our understanding the population forecast for 0-25yrs for the next 5 years to highlight sufficiency issues</li> <li>- Use 5-10yr forecasts to highlight infrastructure requirements</li> <li>- We will articulate our understanding of the Stockport context to Government through statutory returns</li> <li>- We will maximise government funding by providing accurate predictions of need through government returns</li> <li>- We will have a robust developer contribution policy through the new Local Plan</li> <li>- We will articulate our sufficiency needs to central government regional leads to help identify potential bidding opportunities for capital investment initiatives.</li> <li>- We will clearly articulate our social infrastructure needs through our new Local Plan</li> </ul>
Prioritise the spend of funding to assure sufficiency from early years, primary, secondary, through to Post-16 in mainstream and SEND	<ul style="list-style-type: none"> <li>- We will use our understanding of the population forecast for 0-25yrs including SEND to identify pressures.</li> <li>- We will use our understand of the risk posed to the Council through lack of sufficiency in each given area to recommend investment plans</li> <li>- We will use our understanding of the nature of solution needed, capital investment or otherwise to provide a robust plan that meets the requirements of the 3 lenses of sufficiency.</li> <li>- We will ensure robust decision making by using our understanding of the costs, site constraints, land requirements and community, political and school response to any given solution to provide accurately costed and supported plans to Board for decision making</li> </ul>
Prioritise maintenance and condition	<ul style="list-style-type: none"> <li>- We will prioritise budget based on our</li> </ul>

work which may impact the accessibility or availability of school places for all children and to ensure safety of our school buildings	<p>understand of the condition and maintenance requirements across our maintained schools</p> <ul style="list-style-type: none"> <li>- We will challenge schools to ensure leaders take responsibility for their duty to plan and prioritise maintenance works to ensure the learning environment is safe, warm, and weatherproof.</li> <li>- We will risk assess presenting issues and identify those likely to close schools or reduce a school's capacity</li> <li>- We will risk assess issues including safety, fire and asbestos</li> <li>- We will accurately present the site constraints for any given solution and the costs</li> </ul>
Prioritise diversification/repurposing of existing school sites that directly reduce the need for external high-cost special school places	<ul style="list-style-type: none"> <li>- We will use our strong relationships with partner schools and academies to develop our Stockport response to inclusion and SEND.</li> <li>- We will deliver a blend of provision needed to meet children's needs and predicted pupil forecasts</li> <li>- We will ensure robust training, support structures and SEND and inclusion experts to wrap around schools and localities to support inclusion</li> <li>- We will assess all school sites to identify and address physical accessibility</li> <li>- We will coproduce an agreed School Inclusion Strategy</li> </ul>

5.5 Where possible capital investment will be identified and prioritised on the basis that it meets more than one strategic focus. (See 6. Risk based Prioritisation for Investment).

## 5.6 Measuring Performance

Outcomes or returns on investment will be used and monitored to assess the performance of the sufficiency and investment strategy. Key performance indicators include:

- Investment made in planning area £
- Social value benefit of the investment
- Level of surplus places in planning area %
- Condition across the planning area, RAG rated
- Proportion of children from planning area with EHCPs attending schools in the same planning area %
- Proportion of children from planning area with EHCPs and the type of provision they attend (Mainstream, Special School, Resource base, SEN unit, PRU) %
- Proportion of children from the planning area attending schools within the same planning area %

- 5.7 Education transformation and inclusion will support school leadership teams during some capital investment projects acknowledging capital works present significant challenges to schools operationally but once complete may fundamentally change the school's provision/offer. By doing so, Stockport can better assure a return on investment and continued excellent teaching and provision.

## **THE ARCHITECTURE FOR GOVERNANCE AND DELIVERY**

### **5.8 Place Planning perspective**

Better decision making can be made when you consider different perspectives; looking at the same problem from different angles. We have agreed to assess estates, sufficiency and inclusion needs by looking at presenting issues through 3 lenses. This forms the basis as to how we will identify, prioritise and deliver on proposed projects and ultimately move towards our vision.

- 5.9 To illustrate how this will work in practice, the following diagram sets out the reporting lines for decision making and the delivery of the programme. The narrative that follows will explain how this structure assembles and agrees plans to prioritise the capital spend and revenue/DSG funded resources to deliver a long-term sufficiency plan for school places and inclusion.

**One Stockport School Place Planning Outcome:  
Sufficient places in good and improving local inclusive schools at  
the heart of the community that children and families want to  
go to**

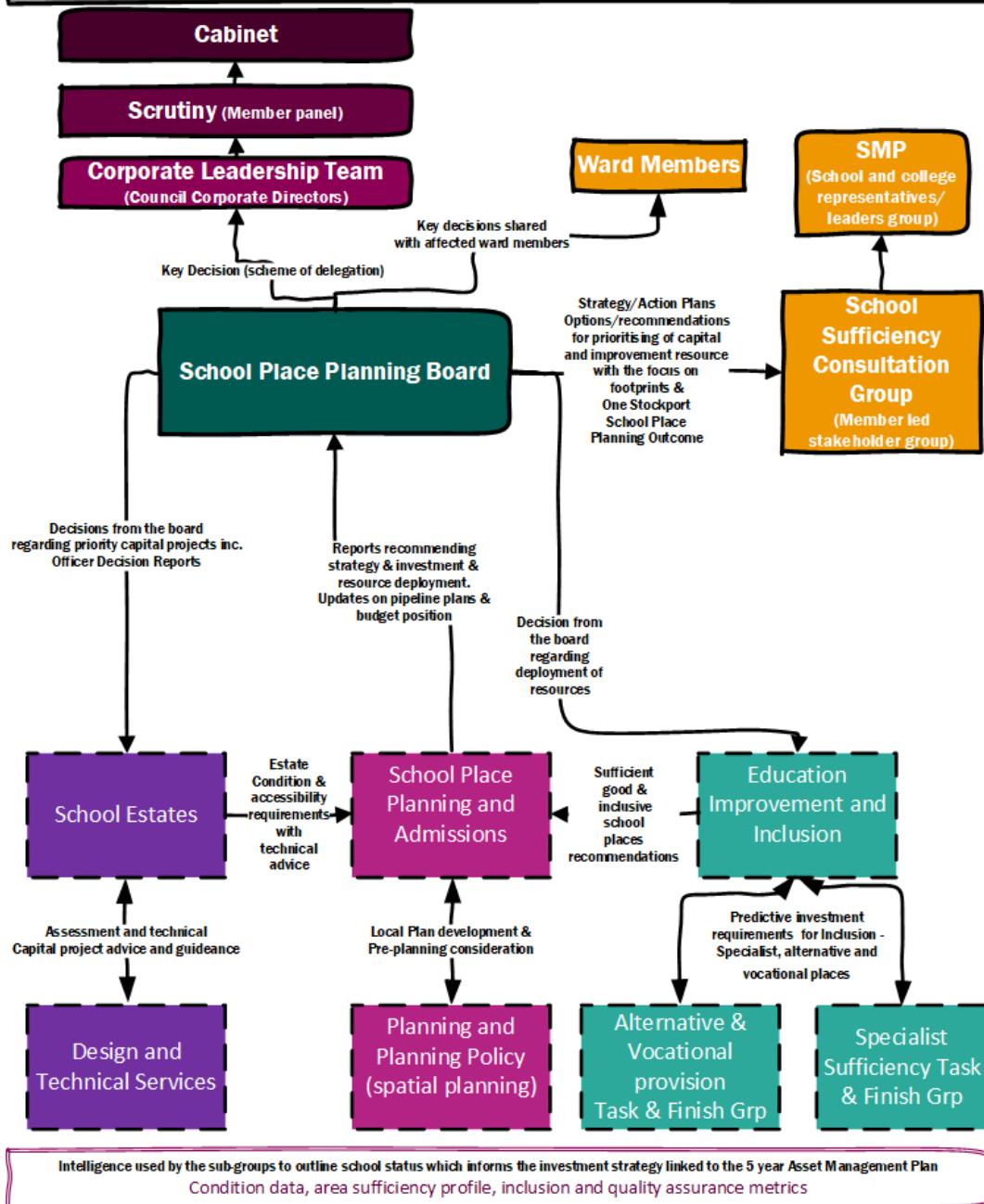


Diagram: Governance and reporting architecture

## 5.10 Place Planning Sub-groups

The Investment Plan relies on 3 key perspectives to enable a robust, representative and considered set of priorities for investment into the education provision in Stockport.

- **Education Improvement and Inclusion** – Supporting the development of good and better local education providers and developing an inclusive and appropriate school place offer. This group is informed by 2 specialist sub-groups that will support the development of the inclusion strategy and give



direction about the associated capacity needed to enable children with SEND to thrive in mainstream, resourced, alternative and specialist places; including supporting more inclusive schools with targeted support from Team Around the School (TAS).

- **School Estates** – managing our building assets and developing accessible and sustainable school fit for the future. This group will coordinate design, technical and construction advice and activity in line with the agreed Schools Asset Management Plan and ad hoc applications for capital works. The Estates Group will have oversight of the capital spend and ensure works are delivered in line with timeframes and agreed costs. The group will report regularly on the Asset Management Plan's delivery and budget position.
  - **School Place Planning and Admissions** – coordinating the application process to access sufficient local places for every level of need in the community. The School Place Planning and Admissions Working Group will have lead representative from Estates, Education Improvement and Inclusion, Admissions and Transport and the Local Plan and will generate options appraisals, recommendations and reports. This will be both ad hoc and timetabled key decisions influenced by the Asset Management Plan. All reports will focus on sufficiency of inclusive local educational places and the capital and revenue support needed to achieve Stockport's ambitions. This group will be responsible for agreeing the SCAP return based on agreed projections and prioritisation of planned school places changes.
- 5.11 All reports requiring a decision will have been consider from the tri-partite perspective of Estates, Education Improvement and Inclusion and Place Sufficiency before further progression to the Place Planning Board to further scrutinise and ultimately ratify recommendations which will be considered by portfolio leaders before progressing the appropriate council governance pathway.
- 5.12 It is important that the Board's work to recommend prioritisation of funds and resources are reflective of the views expressed by residents, schools, and ward members. Consultation and collaboration are central to the approach which is being developed and adopted. The intention is that reports will be scrutinised, commented upon and decisions influenced by the consultation groups (highlighted yellow). It is planned to engage a range of stakeholders including local ward members, parent/carers forums and school representatives affected by recommendations made by the Place Planning Board.
- 5.13 The School Place Planning Board**  
The School Place Planning Board will make investment and deployment recommendations to ensure schools remain at the heart of the communities that they serve and local families have access to sufficient good local inclusive school places that children and families want to go to.
- 5.14 The School Place Planning Board will seek to commission places, when needed, at schools with high levels of parental preference in the local area, in particular those schools that are regularly oversubscribed.

- 5.15 The Board will consider areas that provide easy access in terms of travelling distance, time and nature of the journey, and aim to facilitate the use of sustainable and active modes of transport such as cycling and walking.
- 5.16 The Board will make recommendations on the Schools' Capital Programme and oversee its effective delivery by prioritising spend from the mixture of funding sources to finance additional school places.
- Basic Need and Conditions grant from central government;
  - Ensure that developer contributions to providing school places are secured and maximised through Section 106 / Community Infrastructure Levy contributions from developers;
  - Bidding for capital programmes
  - Free School funding from the Education and Skills Funding Agency (ESFA); and Contributions from schools.
- 5.17 The Board will aim to ensure that disadvantaged groups are not adversely impacted by changes to school locations by completing Equality Impact Assessments.
- 5.18 The Board will ensure all projects assess their environmental impact and have clear and agreed mitigations through the use of Environmental Impact Assessments. This will assist the council to meet its commitment to tackle climate change and its commitment to be a carbon neutral region by 2038.
- 5.19 Any decision that is determined to be a Key Decision, either because of the value of the monies involved or due to the decision affecting more than one ward, will progress through to cabinet for final authorisation. For example, the annual 5-year Asset Management Plan refresh will follow this pathway.

## RISK BASED PRIOTISATION FOR INVESTMENT

- 6.1 Stockport has competing priorities for investment which all relate to and impact upon school place sufficiency. Acknowledging the limited funding available, it is imperative that investment is aligned with our strategy and is targeted at key priorities.
- 6.2 Investment priorities have been identified and feature three key themes;
- **Condition**, ensuring schools are safe and accessible as well as maintaining physical capacity so that it remains operational and accessible.
  - **Sufficiency**, ensuring there are sufficient school places to meet the needs of our all pupils and learners.
  - **Education and Inclusion**, ensuring schools can deliver the national curriculum efficiently and effectively and ensure more complex or enhanced need can be effectively met.

The priorities are as follows:

1. Ensuring our school buildings are safe for staff and children (Estates sub-group)

2. Ensuring our physical capacity remains in adequate condition to ensure school places are accessible (Estates sub-group)
3. Resolving under/oversupply of school places (Sufficiency and Admissions sub-group)
4. Adapting our existing schools to aid operation and efficiency (Education Improvement and Inclusion sub-group)
5. Adapting our existing schools to meet local need (Education Improvement and Inclusion sub-group)

6.3 The priorities listed have been risk assessed based on a simple likelihood/impact based matrix (Appendix 1). The resultant score from comparing likelihood with impact is attributed to a school. School's whose context fits multiple priorities will receive higher compound scores, effectively highlighting the greatest risk, scope for economies of scale and possible value for money.

6.4 **Condition - Safe and operational buildings.**

Methodology to provide a condition rating is based on intensity (Impact) and urgency of need. Intensity is measured as value of surveyed condition need divided by the gross internal area of the school. Urgency (likelihood) is considered by only using surveyed need due within 5 years. Schools therefore have an objective RAG rating based on condition need due within 5 years divided by the area of the school. Schools with an intensity  $>£500/m^2$  are rated RED; schools with an intensity of £200 - £499/ $m^2$  are rated AMBER; schools with an intensity  $<£199/m^2$  are GREEN.

6.5 **Sufficiency - Resolving under/over supply of places.**

Sufficiency has been risk scored using pupil projections. Timing and surplus places (a percentage of the admissions limit) have been used as parameters.

Sufficiency challenges in the next:

- 1-3 years are considered 'probable',
- 3-5 years 'possible' and
- 5+ years 'improbable'.

Surplus places in the range of:

- 0-2% are considered 'intolerable',
- 2-4% 'undesirable',
- 4-6% 'tolerable',
- 6-8% 'acceptable',
- 8-12% 'tolerable',
- 12%+ 'undesirable'

6.6 **Education and Inclusion - Operational efficiency and alignment of need.**

For schools where data suggests that the building (condition or layout) creates a barrier to effectively delivering the national curriculum, inclusion, accessibility, and/or performance, officers will make judgment-based decisions on risk scores. The Ofsted inspection grade, % parental preference and proportion of SEND learners will also be considered for each school.

- 6.7 For each school, under each priority, they will be risk assessed and will receive a risk score. For planning areas that have identified need for more or fewer school places, all schools in that planning area will receive the same risk score. Each priority is weighted so that higher priorities score more. Schools where multiple priorities can be fulfilled will receive higher scores as a result of their compound score. Investment in schools with higher compound scores allows Stockport to seek better value for money and improved outcomes for its residents.

## **0-5 YEARS PRIORITIES AND PIPELINE**

- 7.1 The asset management plan (Appendix 2) should be read alongside this report and details the prioritised projects identified through risk analysis.

## **LEGAL CONSIDERATIONS**

- 8.1 Local authorities must plan for and secure sufficient schools for their area in line with their duties under section 14 of the Education Act 1996.
- 8.2 Section 14 states that a Local Authority shall secure that sufficient schools for providing primary education, and secondary education are available for their area. The schools available for an area shall not be regarded as sufficient unless they are sufficient in number, character and equipment to provide for all pupils the opportunity of appropriate education.
- 8.3 'Appropriate education' means education which offers such variety of instruction and training as may be desirable in view of the pupils' different ages, abilities and aptitudes, and the different periods for which they may be expected to remain at school, including practical instruction and training appropriate to their different needs.
- 8.4 It is a statutory requirement for Local Authorities to identify their strategic priorities and have policies to address these in their local plan document. The local plan will include policies relating to the remodelling and expansion of existing education facilities, and developer contributions required to mitigate the impact of new developments, including in relation to local education provision.

## **EQUALITIES IMPACT**

- 9.1 This investment strategy seeks to consider and prioritise the needs of children with special educational needs and disabilities and where possible provide suitable educational provision in their locality.
- 9.2 An equalities impact assessment has been completed (Appendix 3)

## **ENVIRONMENTAL IMPACT**

- 10.1 The Sufficiency Strategy and Investment Plan (School Estate Asset Management Plan) supports the Council's ambitions to make a difference to climate change with a net zero target for 2038 outlined in the delivery of the

Climate Strategy - Stockport CAN. As we move to implement the sufficiency strategy and investment plan, we will particularly focus to promoting sustainability through low carbon buildings, renewable energy and sustainable transport.

10.2 An environmental impact assessment has been completed (Appendix 4).

## **CONCLUSIONS**

- 11.1 Stockport's physical and socioeconomic landscape is changing. Our local plan, robust intelligence and data can lead us to recommendations of investment that consider sufficiency through the 3 key influencers that will help achieve our ambition of good and improving local schools.
- 11.2 Fundamentally we lack the funding we require to do everything we would aspire to do so therefore we must target our resources to ensure greatest benefits across the school estate delivering a better offer for local families and the local communities.
- 11.3 Increased focus on inclusion and SEND is required to ensure pupils thrive but within a sustainable public budget which has influenced the decisions to prioritise spend in areas of need and expand out differentiated learning offers in line with growing need.

## **RECOMMENDATIONS**

- 12.1 Agree the terms outlined in the strategy and the associated investment plan outlined in the Asset Management Plan.

## **BACKGROUND PAPERS**

Appendix 1 – Risk based assessment model  
Appendix 2 – Education Asset Management Plan  
Appendix 3 – Equality Impact Assessment  
Appendix 4 – Environmental Impact Assessment

Anyone requiring further information should contact Christopher Harland on Tel: 0161 521 1707 or by email on [christopher.harland@stockport.gov.uk](mailto:christopher.harland@stockport.gov.uk)