

## ***CABINET Agenda***

Date Monday 21 October 2019

Time 6.00 pm

Venue Crompton Suite, Civic Centre, Oldham, West Street, Oldham, OL1 1NL

- Notes
1. DECLARATIONS OF INTEREST- If a Member requires any advice on any item involving a possible declaration of interest which could affect his/her ability to speak and/or vote he/she is advised to contact Paul Entwistle or Elizabeth Drogan in advance of the meeting.
  2. CONTACT OFFICER for this Agenda is Elizabeth Drogan Tel. 0161 770 5151 or email [elizabeth.drogan@oldham.gov.uk](mailto:elizabeth.drogan@oldham.gov.uk)
  3. PUBLIC QUESTIONS – Any member of the public wishing to ask a question at the above meeting can do so only if a written copy of the question is submitted to the Contact officer by 12 Noon on Wednesday, 16 October 2019.
  4. FILMING – This meeting will be recorded for live and/or subsequent broadcast on the Council's website. The whole of the meeting will be recorded, except where there are confidential or exempt items and the footage will be on our website. This activity promotes democratic engagement in accordance with section 100A(9) of the Local Government Act 1972. The cameras will focus on the proceedings of the meeting. As far as possible, this will avoid areas specifically designated for members of the public who prefer not to be filmed. Disruptive and anti social behaviour will always be filmed.

Any member of the public who attends a meeting and objects to being filmed for the Council's broadcast should advise the Constitutional Services Officer who will instruct that they are not included in the filming.

Members of the public and the press may also record / film / photograph or broadcast this meeting when the public and the press are not lawfully excluded. Please note that anyone using recording equipment both audio and visual will not be permitted to leave the equipment in the room where a private meeting is held.

Recording and reporting the Council's meetings is subject to the law including the law of defamation, the Human Rights Act, the Data Protection Act and the law on public order offences.

### MEMBERSHIP OF THE CABINET IS AS FOLLOWS:

Councillors Chadderton, Chauhan, Fielding (Chair), Jabbar, Mushtaq, Roberts, Shah and Ur-Rehman

Item No

- 1 Apologies For Absence
- 2 Urgent Business  
Urgent business, if any, introduced by the Chair
- 3 Declarations of Interest  
To Receive Declarations of Interest in any Contract or matter to be discussed at the meeting.
- 4 Public Question Time  
To receive Questions from the Public, in accordance with the Council's Constitution.
- 5 Minutes of the Cabinet Meeting held on 16th September 2019 (Pages 1 - 8)  
The Minutes of the meeting of the Cabinet held on 16<sup>th</sup> September 2019 are attached for approval.
- 6 Education Provision Strategy 2020-2024 (Pages 9 - 130)
- 7 Saddleworth School Update (Pages 131 - 134)
- 8 Broadway Green - Construction of New Link Road (Pages 135 - 138)
- 9 Exclusion of the Press and Public  
That, in accordance with Section 100A(4) of the Local Government Act 1972, the press and public be excluded from the meeting for the following items of business on the grounds that they contain exempt information under paragraph 3 of Part 1 of Schedule 12A of the Act, and it would not, on balance, be in the public interest to disclose the reports.
- 10 Saddleworth School Update (Pages 139 - 148)
- 11 Broadway Green - Construction of New Link Road (Pages 149 - 156)

**Present:** Councillor Fielding (Chair)  
Councillors Chauhan, Jabbar, Mushtaq, Roberts and Shah

1           **APOLOGIES FOR ABSENCE**

Apologies for absence were received from Councillor Chadderton and Councillor Ur-Rehman.

2           **URGENT BUSINESS**

There were two Items of urgent business received, which were accepted in accordance with S.100 B (4) of the Local Government Act 1972, and were considered at Items 10 and 11 of the agenda.

Urgent Cabinet approval was required to enable the Council to make a decision about the Public Space Protection Order in conjunction with Tameside Council's decision making and the proposed changes to the fixed penalty charges impact upon the enforcement powers in relation to the Public Space Protection Order

3           **DECLARATIONS OF INTEREST**

Councillor Roberts declared a personal interest in Items 8 and 13 by virtue of her appointment to the Positive Steps Board.

4           **PUBLIC QUESTION TIME**

There were no public questions received.

5           **MINUTES OF PREVIOUS MEETING**

**RESOLVED** that the minutes of the meeting of the Cabinet held on 19<sup>th</sup> August 2019 be approved as a correct record.

6           **2018/19 ANNUAL STATEMENT OF ACCOUNTS**

The Cabinet gave consideration to a report of the Director of Finance which advised them of the recently approved 2018/19 audited Statement of Accounts and the External Auditor (Mazars LLP) Audit Completion Report (ACR) and Annual Audit Letter.

The report presented the Council's audited Statement of Accounts for the financial year 2018/19, as considered by the Audit Committee on 25<sup>th</sup> June 2019. Delegated authority was given to the Vice Chair of the Audit Committee and the Director of Finance to approve the accounts pending the resolution of two national pension-related issues. The accounts were subsequently approved on 10<sup>th</sup> July 2019, with no changes to the Statement of Accounts that had been presented and accepted at the Audit Committee on 25 June 2019.

The report highlighted:

- The content of the External Auditors Audit Completion Report and Annual Audit Letter containing the

unqualified opinion on the Statement of Accounts and positive value for money opinion.

- The overall revenue outturn position for 2018/19 was a surplus of £0.849m. This was an increase on the favourable variance of £0.255m projected at month 9 that was reported to Cabinet on 25 March 2019.
- The year-end variances that were attributable to each Portfolio.
- Schools balances at 31 March 2019 were £6.925m but were offset by the deficit on the Dedicated Schools Grant (DSG) of £2.723m leaving a net balance of £4.202m held within other earmarked reserves.
- The final Housing Revenue Account (HRA) balance was £21.305m.
- The balance on the Collection Fund was a surplus of £4.147m.
- The small reduction in revenue account earmarked reserves of £2.108m to a level of £80.623m, an increase in other earmarked reserves to a level of £12.935m and an increase in balances to £14.840m reflective of the revenue outturn position.
- Expenditure on the Council's Capital Programme for 2018/19 was £48.564m which was a small increase on the month 9 forecast expenditure of £48.267m. The increase in expenditure required funding allocated to future years to be re-profiled to fully finance the Capital Programme in 2018/19.
- Capital Receipts in year totalled £6.180m, which when taken with the brought forward balance, gave a total of £14.927m, which was used to finance the Capital Programme in year.
- The significant items in each of the primary financial statements.
- Changes to the draft Statement of Accounts.
- The performance of the Finance Team in closing the accounts

Options/Alternatives considered:

No alternatives were presented other than that Cabinet noted the final accounts position for 2018/19, the Statement of Accounts, the Audit Completion Report and the Annual Audit Letter and commended the report and the Statement of Accounts to Council.

RESOLVED that:

1. The Council's final accounts position for 2018/19, the Statement of Accounts, the Audit Completion Report and Annual Audit Letter be noted.
2. The report and Statement of Accounts be commended to Council.

Consideration was given to a report of the Director of Finance which provided the Cabinet with an update on the Council's 2019/20 forecast revenue budget position and the financial position of the capital programme as at 30<sup>th</sup> June 2019 (Quarter 1) together with the revised capital programme 2019/23.

In relation to the Revenue position, the Cabinet was informed that the current forecast outturn position for 2019/20 was a projected deficit variance of £3.805m, after allowing for approved and pending transfers to and from reserves.

Members noted the most significant areas of concern were the People and Place, Children's Services and Community Services & Adult Social Care portfolios. Action was being taken and would continue for the remainder of the financial year to address variances and take mitigating action as detailed in the report.

The overall corporate position was, to a limited extent, being managed by offsetting favourable variances, most noticeably from Capital, Treasury and Corporate Accounting budgets. An update on the major issues driving the projections was provided.

The report reflected the financial position at Quarter 1 and could be regarded as an early warning of the potential year end position if no corrective action was taken. The Cabinet noted that management action had been initiated across all service areas to review and challenge planned expenditure and to maximise income. Although, this action had not yet been fully implemented, it was anticipated that, by the year end, the outturn would be closer to a balanced position and this should start to be demonstrated in the Quarter 2 report which would be presented to Cabinet in December.

Information on the Quarter 1 position of the Dedicated Schools Grant (DSG), Housing Revenue Account (HRA) and Collection Fund was also outlined in the report. There were currently no significant issues of concern in relation to the HRA, however the Collection Fund was forecasting an in-year deficit of £0.480m. The DSG continued to be an area which was facing a financial challenge, with a projected deficit increase in 2019/20. Action was being taken with the aim of reducing the cumulative deficit and bringing the DSG towards a balanced position.

In relation to the Capital position, the Cabinet was informed of the most up to date capital spending position for 2019/24 for approved schemes. The revised capital programme budget was £77.143m at the close of Quarter 1, a net decrease of £10.346m from the original budget of £84.332m. Actual expenditure to 30<sup>th</sup> June 2019 was £6.297m (8.16% of the forecast outturn). It was probable that the forecast position would continue to change before the year end with additional re-profiling into future years.

Options/Alternatives considered:

1. Approve the forecast revenue and capital positions presented in the report, including proposed changes.

2. Approve some of the forecasts and changes included in the report.
3. Not to approve any of the forecasts and changes included in the report.

RESOLVED that:

1. The forecast revenue outturn for 2019/20 at Quarter 1 being a £3.805m overspend be approved.
2. The forecast positions for both the HRA and Collection Fund be approved.
3. The use of reserves as detailed in Appendix 1 to Annex 1 of the report be approved.
4. The revised capital programme for 2019/20 to 2023/24 as at Quarter 1 be approved.

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### **TARGETED YOUTH SERVICES - OPTIONS FROM APRIL 2020**

Consideration was given to a report of the Interim Director of Children's Services and Director of Public Health which informed the Cabinet that the current contract for the delivery of targeted youth services delivered by Positive Steps was due to end on 31st March 2020 and it was intended to undertake a procurement exercise to establish delivery arrangements from April 2020.

The report set out options in respect of how the service might be re-procured with particular reference to the Youth Justice Service. The report also sought Cabinet approval to delegate the decision to award the contract to the successful bidder/bidders to the Director of Children's Services in consultation with the Strategic Director, Communities and Reform and Portfolio Holders for Children's Services and Health and Social Care.

Options/Alternatives considered:

1. Proceed with the procurement plans set out in the report and re-procured the Targeted Youth services in the current lots.
2. Revert to the previous contracting arrangement where the services were brought together under one overarching contract.
3. Do not proceed with the re-procurement exercise either by reason of affordability or in terms of the services currently making up the contract.

RESOLVED that the Cabinet would consider the commercially sensitive information contained at Item 13 of the agenda.

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### **COUNCIL PERFORMANCE REPORT JUNE 2019**

The Cabinet gave consideration to a report of the Head of Business Intelligence which provided a review of Council performance to June 2019.

The report provided the Cabinet with an overview of the Council's performance against priorities outlined within the Corporate Plan, which had been monitored in the period April to June 2019.

Options/Alternatives considered:-

To note the Council performance April to June 2019.

RESOLVED – That the Council Performance Report June 2019 be noted.

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### **PROPOSED PUBLIC SPACES PROTECTION ORDER - MOORLAND AND PUBLIC OPEN SPACES IN SADDLEWORTH**

Consideration was given to a report of the Community Safety Manager which asked the Cabinet to approve the making of the Public Spaces Protection Order relevant to Oldham pursuant to s59 of the Anti-Social Behaviour Crime and Policing Act 2014.

Members were informed that the Anti-Social Behaviour Crime and Policing Act 2014 gave local authorities the power to make Public Spaces Protection Orders (PSPOs) to control behaviours on land to which the public have access, which have caused or may cause a detrimental effect on the quality of life of those in the locality and are likely to be on a continuing or persistent nature and are therefore unreasonable.

In the last two years there had been a significant number of wildfires reported and responded to on moorland across Oldham and Tameside.

Between June 2018 and May 2019 Greater Manchester Police received 27 reports of moorland fires across various areas on Saddleworth Moor in Oldham. Some of the reports related to fires which were already being attended to by the emergency services and military personnel, but which had spread, or fires which had previously been extinguished but had re-ignited. During the same period 10 reports were made to police of people having barbecues on the moorland.

The fires caused major loss to the land, the death of wildlife and damage to property. Without any further fires occurring, it was estimated that the land would take at least five years to recover and approximately ten years for the wildlife to return.

Oldham Council and Tameside Council were working together with the Greater Manchester Fire and Rescue Service, Greater Manchester Police and United Utilities, who owned a significant portion of the moorland, to develop a response which would prevent and disrupt high risk activities, including lighting of fires, possession and use of barbecues, fireworks, Chinese lanterns and other open flame heat sources upon the moorland.

The potential implementation of Public Spaces Protection Orders, which were enforceable by means of fixed penalty

notices or prosecution, had been identified as the most appropriate course of action to respond to the issues and reduce the likelihood of further moorland fires.

Under the provisions of the legislation, prior to the making of a PSPO, a statutory consultation exercise must be undertaken. The consultation exercise had ended on the 5<sup>th</sup> August 2019.

The Cabinet was informed that, should the Orders be made, both Orders would be identical in order to avoid confusion along the contiguous land border.

Options/Alternatives considered:

1. To approve the making of the Public Spaces Protection Order pursuant to s59 of the Anti-Social Behaviour Crime and Policing Act 2014.
2. To reject the making of a Public Spaces Protection Order.

RESOLVED that the making of the Public Spaces Protection Order pursuant to s59 of the Anti-Social Behaviour Crime and Policing Act 2014 be approved.

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## **CHANGES TO DISCRETIONARY FIXED PENALTY CHARGE LEVELS**

The Cabinet gave consideration to a report of the Community Safety Manager and Environmental Health Manager, seeking approval for proposed increases to Fixed Penalty Charge levels and to the use of Fixed Penalty Notices for offences of fly-tipping and breach of the household waste duty of care.

The Cabinet was informed that there were a number of legislative powers to control negative behaviours which impacted upon the environment and communities, which the local authority was able to enforce through the issue of Fixed Penalty Notices (FPNs) as an alternative to prosecution.

Within the respective legislation the maximum values for Fixed Penalty Charges in respect of each of the offences was prescribed, however the local authority was able to set the values at any level up to the maximum allowed and was also able to offer further reductions through the provision of an early payment scheme.

The local authority could seek prosecution if the Fixed Penalty Charges were not paid.

Historically local values had been set at significantly lower levels than the maximum allowed.

The current low value levels were believed to be a contributory factor in continuing negative behaviours, and it was believed that an increase in the values would deter individuals and organisations from such conduct.



Members were informed that there was also an existing power to issue FPNs for fly-tipping and breach of the household waste duty of care, which the local authority did not currently exercise. All fly-tipping and duty of care enforcement was undertaken through prosecution, however this could be resource intensive and could be disproportionate. The ability to use FPNs as an alternative allowed for officer discretion according to the circumstances of the case.

Options/Alternatives considered:

1. To approve the proposed changes to the values of the Fixed Penalty Charges and to approve the use of Fixed Penalty Notices for fly-tipping and breach of the household waste duty of care with the level set at the maximum £400.00 with an option to pay a reduced rate of £280.00 for early payment.
2. To approve the proposed changes to the values of the Fixed Penalty Charges and to approve the use of Fixed Penalty Notices for fly-tipping and breach of the household waste duty of care but set alternative Charge levels.
3. To retain the existing levels of Fixed Penalty Charges.
4. To retain prosecution action only for fly-tipping and breach of the household waste duty of care.

RESOLVED that:

1. The proposed increases to the Fixed Penalty Charge Levels be approved
2. The use of Fixed Penalty Notices for offences of fly-tipping and breach of the household waste duty of care be approved.

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### **EXCLUSION OF THE PRESS AND PUBLIC**

**RESOLVED** that, in accordance with Section 100A(4) of the Local Government Act 1972, the press and public be excluded from the meeting for the following items of business on the grounds that they contain exempt information under paragraph 3 of Part 1 of Schedule 12A of the Act, and it would not, on balance, be in the public interest to disclose the reports.

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### **TARGETED YOUTH SERVICES - OPTIONS FROM APRIL 2020**

The Cabinet gave consideration to the commercially sensitive information in relation to Item 11 – Targeted Youth Services - Options from April 2020.

RESOLVED - That the recommendations as detailed within the report be approved.

The meeting started at 6.00 pm and ended at 6.18 pm

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## Report to CABINET

# Education Provision Strategy 2020-2024

**Portfolio Holder:** Cllr Shaid Mushtaq (Cabinet Member of Education and Skills)

**Officer Contact:** Andrew Sutherland (Director of Education, Skills and Early Years)

**Report Author:** Andy Collinge, Head of School Support Services  
**Ext.** 4239

**21<sup>st</sup> October 2019**

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### Reason for Decision

The Council has a statutory duty to provide sufficient school places within the borough. Education Provision covers all those of statutory school age and also includes pupils with SEND. Both mainstream school places and SEND have been included in this strategy document. In order to deliver a comprehensive offer of places in the borough an Education Strategy has been prepared to clarify the Council's position and intentions with regard to the provision of school places.

### Recommendations:-

1. That the Education Provision Strategy 2020 -2024 be approved and adopted.
2. That authority be delegated to the Member for Education, Skills and Early Years and the Director of Education, Skills and Early Years to update the strategy annually in line with demographic and place pressures over the period that the strategy is in place.

**1 Background**

- 1.1 Oldham Council is facing significant challenges as a result of increasing demand for school places. There are predicted significant increases in demand for pupil places for the foreseeable future and beyond the timeframe of this strategy.
- 1.2 Statute requires the Council to provide a place for every child. This strategy will enable the Council to fulfil that duty. Although not contained in statute it is also the clear target of the Council to ensure that as many of these places as possible are in good and outstanding provision. In addition, it is also the clear target of the Council to ensure that as many parents as possible obtain a school place of their choice.
- 1.3 The strategy clarifies the position regarding Council support for Trusts and other providers wishing to open new provision in the borough. The Council will only endorse new academies and schools where there is a clear demonstrable need for such provision and that provision is overseen by organisations who have a proven, long standing and consistent track record of delivering good and outstanding provision

**2 Current Position**

- 2.1 The draft Education Provision Strategy provides the context and policy for the provision of statutory education places in the borough. Provision in the primary sector is relatively stable, however there is significant pressure and demand on places in the secondary and SEND sectors and this is set to continue as the population in the borough increases over the coming decade.
- 2.2 The framework for making decisions regarding the provision of school places is overseen by the Education Provision Group which comprises of elected members, officers and representatives from academies and maintained schools.
- 2.3 The current process for approving school expansions and the establishment of new provision is, in comparison to other GM authorities lengthy and time consuming. A new process of approving new schools and expansions is contained in the strategy which ensures that all statutory approvals are met and seeks to streamline decision making so new provision can be agreed as quickly as possible without compromising the need for consultation with residents and elected members.
- 2.4 Previously central government had set out a commitment that all schools should convert to academy status by 2022 (White Paper, Education Excellence Everywhere). This is no longer the position and it is clear that for the foreseeable future the school system will be a mixed economy of community, voluntary aided schools and academies/free schools.

**3 Options/Alternatives**

- 3.1 **Option One:** Adopt the Education Provision Strategy as appended to this report. This strategy reflects the Council's position to provide high quality places and provision.

**Option Two:** Suggest amendments to this strategy as presented. This is not the recommended option as the strategy has been developed to address the most pressing requirements in the borough.

**Option Three:** Not adopt the strategy. This is not recommended as it would leave the Council vulnerable in the light of implementing its statutory duty to provide sufficient school places.

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#### 4 **Preferred Option**

4.1 It is recommended that the appended strategy is approved.

#### 5 **Consultation**

5.1 Appropriate consultation has taken place.

#### 6 **Financial Implications**

6.1 There are no financial implications arising directly from this report. However, the Education Provision Strategy will need to operate within the parameters of the existing Capital Strategy and have regard to any revenue implications as outlined in section 5 of the Strategy for any proposed capital investments. Any revenue implications that affect the Council General fund budget will need to be incorporated in the Medium Term Financial Strategy and budget setting process. The revenue implications are included in the Education Provision Strategy (Liz Caygill)

#### 7 **Legal Services Comments**

7.1 Adoption of the Education Provision Strategy would assist the Authority in meeting its statutory duty to provide school places. The strategy should be reviewed in the light of any legislative changes (Alexander Bougatef)

#### 8. **Co-operative Agenda**

8.1 A Co-operative council delivering good value services to support a co-operative borough.

8.2 The provision of sufficient numbers of quality school places is a statutory service and contributes to the Council's outcome around *getting the basics right* (Andy Collinge)

#### 9 **Human Resources Comments**

9.1 There are no HR implications from a statutory perspective. Expansion of existing provision will provide valuable employment opportunities in the borough (Andy Collinge)

#### 10 **Risk Assessments**

10.1 By working within an agreed strategy the risk of running short of school places will be reduced and the likelihood of creating high quality places will be increased. (Mark Stenson)

#### 11 **IT Implications**

11.1 None

#### 12 **Property Implications**

12.1 Adoption of this strategy will aid the implementation of school projects to meet the Authorities Statutory Duty and allow schemes to be prioritized. (Andrew Hall)

#### 13 **Procurement Implications**

13.1 None

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- 14      **Environmental and Health & Safety Implications**
- 14.1     The availability of quality school places will reduce the likelihood that parents will travel beyond a reasonable walking distance in order to take their children to school. This in turn will reduce car journeys within the borough
- 14.2     By attending their preferred choice of school parents and children are more likely to feel confident about their educational experience which can contribute to their sense of well-being (Laura Smith)
- 15      **Equality, community cohesion and crime implications**
- 15.1     Admission authorities have a legal duty to comply with the parental preference wherever possible. Consequently, Oldham’s school place planning approach takes account of identified demand for places. In terms of equality, the proposal will positively increase the supply of school places in the borough.
- 15.2     The LA makes every effort to ensure that parents are not only aware of which schools are available in their local area and beyond but that the information that is published is clear and concise so that parents and young people are able to make informed choices about the school that they would like to attend. The level of satisfaction in terms of the availability of places at a preferred school contributes to community cohesion. (Andy Collinge)
- 16      **Equality Impact Assessment Completed?**
- 16.1     Advice has been sought on EDI and there are no implications for any vulnerable groups. (Andy Collinge)
- 17      **Key Decision**
- 17.1     Yes
- 18      **Key Decision Reference**
- 18.1     EDS-07-19
- 19      **Background Papers**
- 19.1     N/a
- 20      **Appendices**
- 20.1     Education Provision Strategy 2020 – 2024 (Inc Associated Appendices)

# Opportunity for All: Oldham's Strategy for the Provision of Mainstream and Send School Places 2020-2024

**Andy Collinge**  
Head of School Support Service

**October 2019**

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# 1. Foreword

## **Councillor Shaid Mushtaq**

### **Cabinet Member for Education, Early Years and Skills**

The demand for school places in Oldham has increased significantly in recent years, in 2019 there were around 42,000 school age children by 2024 this will have increased to 45,000 and by 2028 to almost 47,000 pupils.

The Council has a statutory role to ensure that every child in the borough has a school place. In addition to this it is the clear aim of the Council is to go beyond statutory requirements and ensure that these places are in good or outstanding schools and that as many people as possible are offered a place in a school of their choice.

Good schools with high attainment rates are crucial if the town is going to develop and thrive in the 21<sup>st</sup> Century. There has been unprecedented reform in the education system in recent years, with many schools becoming academies, forming trusts and federations or becoming MATS (Multi- Academy Trusts) in their own right. This has necessitated a change in the way the Council has to operate and open and honest relationships with all providers will be a cornerstone of the Council's approach to improving and developing outstanding provision in the borough.

The Council is committed to working closely with all education providers on an equal footing. This strategy acknowledges that continuous improvement of the education offer in Oldham cannot be achieved without equal, honest and open relationships with every provider in the borough. Strong partnership arrangements are in place, which include the Council, the Oldham Education Partnership (OEP) and the Opportunity Area (OA). This involves working with all Schools, Academies, Multi Academy Trusts (MATs), Dioceses and Teaching Schools to improve opportunities and outcomes for all. There is a shared strategic vision to improve life chances for all children and young people in Oldham through a combined approach that is owned by all partners. Oldham knows its schools well and is very well placed to continue recent improvements across the educational system.

This strategic document provides the context and policy for the provision of statutory education places in Oldham for children and young people, including those with SEND.

As with mainstream provision analysis of SEND place requirements also shows a significant increase in demand.

Oldham has some of the best SEND provision in the country and we will continue to work with local trusts to develop additional places and pathways for young people with additional needs so that they can contribute fully to the economic and cultural growth of the borough.

We are acutely aware that not every parent and child are offered the school place of their choice. We will strive though the creation of additional places and through working with trusts and schools to achieve a significant increase in the number of children attending good and outstanding schools, particularly in the secondary sector. Choice of place in the primary sector already exceeds national averages and by 2022 we hope to mirror this in the secondary sector.

## 2. Introduction

- 2.1. Councils have a statutory duty to ensure there are enough school places available for local children and young people. No other local or national body shares with them the duty to secure sufficient primary and secondary and special school places. This cannot be achieved without working in partnership with schools, trusts and a range of other partners.
- 2.2. This strategic document provides the context and policy for the provision of education places for children and young people aged including those with SEND. This information may prove useful for schools and education providers in the context of their own development planning and for those organisations who are considering offering education provision in the town or submitting applications to open provision via the annual Free School Wave.
- 2.3. Oldham Council, along with many other local authorities nationally, is facing the significant challenge presented by the increase in demand for school places. Expansions of the primary sector having continued consistently since the early 2000's and the number of children in the primary sector has increased from around 21,000 in 2005 to nearly 25,000 in 2019.

There has been significant increases in primary age children in the borough particularly since 2011 onwards and this has in turn required a subsequent increase in secondary school places. The current pressure on the secondary sector is set to continue until at least the mid 2020's. Additional secondary provision will be provided to cope with this demand.

- 2.4. Future demand for school places is predicted using an agreed formula that takes account birth rates, inward migration and proposed new housing. Current projects in the secondary sector have provided an extra 222 places for 2019. Additional capacity will also be provided by 2 brand new Secondary Academies in 2020 and 2022 which will eventually (when full) provide an additional 2,700 places.
- 2.5. In order to deliver its statutory responsibilities in the provision of school places, Oldham Council will seek to provide standardised design solutions based on the Education and Skills Funding Agency's (ESFA) baseline template wherever possible, in order to minimise costs and timescales. Oldham Council will always fully consult with all stakeholders prior to reaching into reaching decisions.
- 2.6. The Regional Schools Commissioner (RSC) for Lancashire and West Yorkshire works with school leaders to promote and monitor academies and free schools and is responsible for decisions regarding new academy and free school sponsors, approving new academies in the area and intervening in underperforming academies and free schools.
- 2.7. The population growth forecast across the Greater Manchester authorities will continue to create increased demand and consequent pressure on school places. Consideration is being given to the development of a GM pupil forecasting model as part of the proposed GM Education, Employability and Early Years Devolution Programme. The aim would be to consolidate fragmented pupil place planning processes and school estate capital. The Council will fully engage with any GM wide strategy on the development of school's places.

### 3. Principles and Local Context

- 3.1. The Council's Corporate Plan encompasses themes of driving change, delivering high performance and encouraging investment and regeneration. None of this can be achieved without a first-class education offer that promotes opportunities and enables young people to make the most of their talent and ambitions.

In order to attract the best employers and deliver skilled jobs and drive economic prosperity it is crucial that our education system produces literate, motivated and confident young people. We want people to succeed and remain in the borough offering their skills and talents to local employers.

- 3.2. When seeking to manage the demand and supply of school places in Oldham, Oldham Council will take into account the diverse range of provision and educational organisation arrangements that are working well and those that are not working as well. When new or changed provision is considered the Council will seek to influence any proposals to secure high quality educational provision for its citizens.

The Council works with all education institutions, the RSC and academy and free school sponsors to secure high standards ensuring parents have a real choice in selecting appropriate provision for their children. The current school and college estate is shown at Appendix A.

- 3.3. Oldham Council policies for Academies and Free Schools set out the Council's policy when schools convert to academy status or when Free Schools are established or proposed in the borough. Academies become independent of local authorities and conversion leads to changes in responsibilities, finance and working relations between local authorities and academies.

The policies and guidance outline the approach that will be taken by the Local Authority and offers practical advice and guidance on how governing bodies should approach the issue of conversion and how the local authority (LA) will engage with the conversion and free school process. The applicable policies can be found at Appendix B.

- 3.4. There has been a rise in the number of special school places from 780 places in 2015 to 923 in 2018. Between 2015-19 we have seen a significant increase in the number of special school places across all primary need categories for SEND.

The number of pupils with Autistic Spectrum Disorder (ASD) attending a special school in Oldham has seen a 152% increase from 2015 to 2019 with 71 pupils attending a special school in 2015, compared to 179 pupils in 2019.

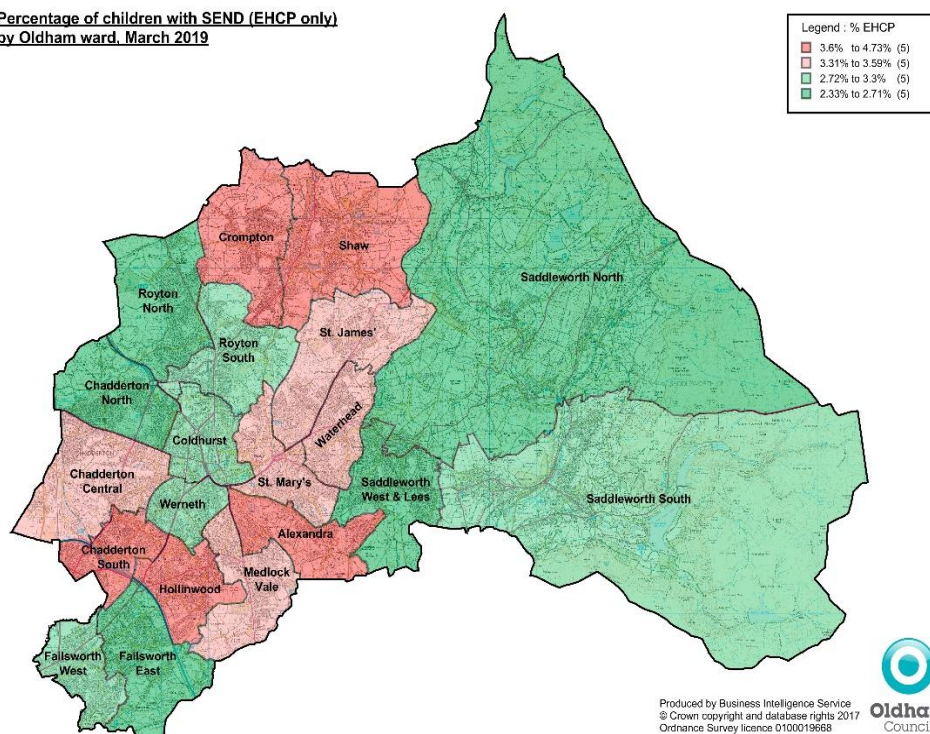
The significant increase in places can be attributed to the increase in Education, Health and Care Plans that we have seen from 2015-19 and the sheer demand for children and young people to attend a special school in Oldham.

In addition, Oldham's population has also seen an increase and according to the Office for National Statistics (ONS), Oldham's population is projected to reach 255,200 by 2041 – a 9.2% increase from the 2017 population. Oldham also has a high proportion (22.5%) of residents aged under 16 and proportionally fewer (15.7%) aged 65 and over.

Taking these factors into consideration, the assumption is that Oldham will see a continuous rate of growth for special school places from 2019 to 2025.

The prevalence of EHC Plans across the borough is illustrated below:-

**Percentage of children with SEND (EHCP only)  
by Oldham ward, March 2019**



The number of EHC Plans issued by the LA has significantly increased from 2014-15 to 2018-19, illustrated in Table A. The increase in demand of EHC Plans is closely linked to the rise in demand for special school places. If the current rate of growth continues and no plans are rescinded, we can expect a total of 4220 EHC Plans by 2023-24.

**Table A: EHC Plans issued by year in Oldham**

Year	Total number of EHC Plans issued
2014-15	1160
2015-16	1261
2016-17	1498
2017-18	1718
2018-19	2056

Source: SEN2 report

Social Finance (a finance specialist third sector organisation) were commissioned by Oldham Council to carry out an extensive review between January to June 2019 on the High Needs Block to better understand the local context and funding for SEND in Oldham. Qualitative evidence from interviews carried out during this review suggested that there are two main reasons behind the increasing number of children going to special schools during the period of 2013-2018.

The first is the higher demand for EHC Plans in mainstream schools, particularly for Speech, Language and Communication Needs (SLCN) and Social, Emotional and Mental Health (SEMH) needs, which may be leading to more referrals into special school.

The second reason is a greater emphasis on parental preference since the introduction of the 2014 reforms, as many parents prefer their child to be in a special school.

Furthermore, the total number of pupils who attend an independent school or who are educated out of borough has also increased from 78 pupils in 2015 to 109 pupils in 2017-18.

Consequently, Social Finance noted that spending on out of borough or independent sector placements more than doubled from £1.8m in 2014/15 to £3.7m in 2018/19. That rise can be explained by a combination of a rising number of placements, and a rise in the median cost of each placement. For 2018-19 the median cost of placement was £39,813.21.

The reasons for a rising number of out of borough placements are likely to again be a combination of parental preference and capacity issues due to rising numbers of children with SEND in mainstream and special schools, leading to more out of borough referrals. 32% of pupils with SEMH identified as their primary need in an EHC Plan are educated out of borough, highlighting that demand is currently not met in-borough for this cohort of pupils.

However, Oldham Council has prioritised reducing out of borough placements over the last 18 months, introducing stronger decision-making processes and ensuring that local provision can meet the needs of children and families.

Consequently, there were 89 out of borough placements in 2018-19 which was an 18% reduction from 2017-18. This number is likely to continue to reduce which will inevitably have an impact on the provision available in borough.

Appendix C highlights the historical and predictive data in relation to SEND place demand and also lists the broad areas of need in the borough.

### In-Borough Special School Provision

School	Official PAN	Revised Sept 2019 PAN	On Roll for Sept 2019	Surplus in September 2019	Commissioned Places for April 2020
Kingfisher	175	185		185	175
New Bridge	360	394		394	360
Hollinwood Academy	140	215		215	215
Spring Brook	78	78		78	78
Spring Board	30	30		30	30
North Chadderton Resource	12	12		12	12
Hathershaw Resource	12	12		12	12
<b>TOTALS</b>	<b>807</b>	<b>926</b>	<b>0</b>	<b>926</b>	<b>882</b>

- 3.5. Pupil place planning will be closely aligned to the Council's performance in relation to school admissions and appeals. Currently there are not enough good and outstanding places available to families in the secondary sector. This inevitably results in a number of parents not receiving an offer of a place in the school of their choice.

Future provision will attempt to address this by ensuring the Council only supports new and expanded provision where there is clear evidence that the providers can achieve and maintain a favourable Ofsted rating and demonstrate clear progress and enhanced achievement for pupils.

The Council will seek to ensure that as we progress with developing additional provision there is a corresponding increase in the number of pupils gaining a place at their first choice school. We would also expect to see a significant decrease in the number of school place appeals over the course of the next 3 to 4 years as parents are increasingly able to gain a place at their first preference school.

The current performance of the LA in relation to admissions and appeals can be seen at Appendix D.

## 4. Needs Analysis

- 4.1. The school capacity survey (SCAP) is a statutory data collection that all local authorities must complete every year. The 2019 SCAP return and commentary is at Appendix E.

SCAP is based on data collected in the January Schools Census about:

- school capacity (i.e. the number of places and pupils in a school)
- pupil forecasts (i.e. an estimation of how many pupils there will be in future)
- capital spend (i.e. the money schools and local authorities spend on their buildings and facilities)

- 4.2. The Department for Education (DfE) and the EFA use the data to identify areas where there may not be enough school places and also use projections of pupil numbers to calculate the basic needs funding local authorities receive to provide enough school places to meet future demand.

- 4.3. Oldham Council has developed an agreed forecasting methodology, set out at Appendix F. The forecast is refreshed on a termly basis to reflect the latest trends and maintain accurate data.

- 4.4. The Decision Support Matrix (DSM) is an evidence-based methodology to support the LA's decision-making process for school expansion projects. The DSM, set out at Appendix G, will ensure that the process is open, fair and transparent and that decisions are made consistently based on evidenced criteria thresholds. At the pre-decision consultative stage, schools within the locality will be approached to gain their views on any proposals.

## 5. Funding Streams for Capital Works

5.1 Capital expenditure can be funded from a number of different sources, the most common of which are expanded on in further detail below.

### 5.2 Basic Needs Funding

On an annual basis the DfE awards Basic Needs funding to individual Local Authority areas. This is a sum based upon the perceived need for additional school places calculated from the SCAP data. Although non-ring fenced this annual grant is intended to be used by local authorities to provide additional school places. Basic needs funding, whilst being an annual award, is notified 3 years in advance to help local authorities to plan and prioritise their capital investment programmes. The current position regarding basic funding spend and remaining allocation is contained at Appendix H.

### 5.3 Free Schools

Free schools are schools set up by Trusts, funded by the government but not controlled by the local authority.

Under a government initiated programme to provide additional school places and to provide an alternative model to local authority controlled schools the ESFA run a programme to create new free schools on an annual basis.

When considering the need for additional school places in the borough it may be possible, subject to elected members' agreement, to work with the ESFA to promote the creation of one or more free schools to create additional places. The capital funding and construction of free schools is centrally run by the ESFA and any funding spent by the ESFA under this route is likely to be reflected in basic need funding awarded to the local authority.

### 5.4 Prudential borrowing / Council resources

Should the Council consider the provision of additional school places or physical improvements in existing buildings to be a priority, and for which there is not sufficient external funding, Members may decide to approve use of council resources.

Sources of council funding include:

- Capital receipts – generated from the sale of council owned land or property;
- Prudential Borrowing – which would be paid for in future years over the life of the asset and create a charge annually to the revenue budget.
- Revenue funding – it is possible to allocate revenue funding to directly finance capital expenditure.

### 5.5 Devolved Formula Capital (DFC)

DFC is capital funding devolved direct to schools by the DfE with the aim of enabling individual schools to target capital funding in line with their own asset management priorities. The asset management priorities are listed in each schools asset management plan which is agreed with the school and its governors and property officers.

### 5.6 Government Grants (Time Limited)

On an occasional basis central government organise programmes or discretionary grant processes which are directed towards the funding of projects related to school building.

Current grants schemes include:-

- School Nurseries Capital Fund
- SEND Capital Fund

The Council has historically been relatively successful in applying to these programmes they are not a predictable source of funding and as such cannot be relied upon as part of a sustainable strategy. Officers will however through their best endeavours ensure that if and when should they arise in the future, the funding programmes will be reviewed and discussed with Members. This will include a review of potential projects to determine whether any applications should be made and, if so, for which schemes.

- 5.7 If a school under local authority control elects to convert to Academy status there will under certain circumstances be a need for the carrying out of capital works. The need for and the extent of these works will be evaluated in line with the policy position outlined in the Academies Policy.

## 6. Revenue Funding Implications

- 6.1 Where a free school is a Special School the top up funding (i.e. the amount above the per-place rate of £10,000) is funded from the commissioning Local Authority's DSG. The current Oldham top up rate ranges from £2,707 per place to £34,236 dependent upon the severity and complexity of the young person's special educational needs.

The place funding for Special Free schools was previously funded directly to the school for 2 years by the ESFA before the funding was transferred to the Local Authority. For all free schools opened before the 2019/20 academic year, place funding is now included in the local authorities high needs allocations in 2019/20. Funding for these places will be deducted from local authorities' high needs allocations by ESFA, and paid directly to schools, as for special academies.

For Special Free schools opening in the 2019/20 academic year, the ESFA will fund the place funding directly to the school for 12 months before transferring the funding into local authorities' high needs blocks in 2020/21. If the Special School is still growing the local authority funds the additional places from its DSG even though funding for these places will never be received in the DSG. There is currently no growth in the high needs block of the DSG so the LA will be required to fund the £10,000 per place for any growing Special School whether it is an academy or not.

- 6.2 If the Council builds a new school, it will open as an Academy. In this case the Council will have to fund start-up costs for the new school from the DSG. The start-up costs will consist of:

- resources needed for the new school to open and function from its first day
- Pre-opening costs for staffing, recruitment etc

- 6.3 Where there is a significant growth in pupil numbers as a result of the local authority's duty under section 13(1) of the 1996 Act to secure sufficient primary and secondary education places are available to meet the needs of the population of their area, the Local Authority can retain a growth fund from the DSG.

Oldham's criteria for growth reflect actual pupil number increases above capacity of the school and schools are funded on pupil numbers above capacity multiplied by the Basic Amount per Pupil and also those occasions where there has been a significant number of new arrivals in school.

The LA will not receive any additional funding in the DSG for the estimated increase of pupils



in year as the DSG settlement will be based on the October census from the previous year and will not be re-determined. The cost of the increase in PAN will therefore have to be met from the LA's Growth fund and will be replicated for the next 4 or 6 years.

The cost each year for 10 new pupils for September – March would be £16,251 for 10 new primary aged pupils and £22,845 for 10 new secondary pupils. Growth funding is within local authorities' schools block allocations. For 2019 to 2020, growth funding has been allocated to local authorities using a new formulaic method based on lagged growth data.

## 7. Decision Making and Governance

- 7.1 Education provision in Oldham is kept under review by the Education Provision Group. Terms of Reference for the EPG are set out at Appendix I. The main function of the group is to make recommendations on the annual schedule of proposed capital investments consequent to completion of the needs analysis using the agreed forecasting methodology and by application of the matrix to determine demand and supply priorities.
- 7.2 Officers will establish and update an annual schedule of priority for Capital schemes based on:
- Availability of suitable land and buildings
  - Matrix of school demand vs. places provided
  - Priority maintenance schedule
  - Pupil locations and anticipated locations (normally illustrated on dot maps but additional methods of presentation are considered)
  - Pupil number predictions
  - Availability of readily developed schemes.
- 7.3 A prioritised schedule of education capital investment projects will be prepared and updated by officers on an annual basis looking at predicted spend over the immediate programme, the three future years that basic need funding is visible and into the medium term (3-7 years).
- 7.4 Proposed capital investments will be initially be discussed and proposed by, the EPG before being presented to the Capital Investment Programme Board for discussion, and where appropriate, incorporation into the Council Capital Strategy and Programme subject to member or cabinet approval. Appendices J and K outlines the agreed decision making processes for both maintained schools and academies/free schools.
- 7.5 To enable officers to maximize opportunities available to create and fund new projects to satisfy demand a number of enabling factors will be required to be agreed:
- Establish an annual revenue budget to support development of scheme proposals ahead of allocation to capital programme
  - Development of specific school building condition reporting
  - Development of specific schools standards and admissions data reporting tools.
- 7.6 Need and the local national context can change relatively quickly. Others are currently waiting on a number of strategies to provide school places and improve local provision. Project currently agreed as priority one listed at Appendix L.

## 8. Variables over the lifetime of the Strategy

- 8.1. Oldham Council has developed a robust method for forecasting future pupil population. Our current priorities for use of Basic Need allocations and Targeted Basic Need projects are based on the local forecast. Any future GM forecast could potentially impact on the programme subject to a review of priorities across GM. Priorities must therefore remain under review initially under the auspices of the Education Provision Group.
- 8.2. Inward migration has increased for a considerable period of time, it is not known what the impact of the UK leaving the European Union will have. Any changes will be reflected in the annual pupil place forecast completed in July each year. As the Education Funding Agency allocates basic need funding based on this data it is vital that we keep abreast of local and regional changes and adjust our forecasts accordingly.
- 8.3. Indications are that there will be an increase in the number of large family houses as part of new developments, attracting families with multiple siblings requiring several places in different year groups in the same school. In order to meet this type of demand it is necessary to carry a reasonable level of surplus capacity in order to avoid siblings being split. Every effort will be made to plan provision so that it reflects local need and that a reasonable surplus of places remains in the system. The strategy will be updated in line with developments in the Greater Manchester Spatial Framework (GMSF).

## 9. Strategic Principles

- 9.1 Oldham Council will only support the establishment of Free Schools where there is clear demonstrable evidence of need in the local area.
- 9.2 Council support for new academy sponsors or potential free school providers will only be offered to Multi Academy Trusts who can demonstrate a long standing record of continuous school improvement and who have a track record of working closely with local authorities in the areas of pupil place planning, school to school support and school improvement.
- 9.3 Free school providers and academy trusts wishing to open new provision in the borough must be able to demonstrate that their admissions policies will be fair and equitable and closely aligned to local need.
- 9.4 Analysis of SEND predictions indicates a substantial increase of SEND places/provision will be needed. The Council will actively work to ensure that any new mainstream provision in the borough will offer in house provision for SEND pupils in order to reduce the number of places required in the Special School sector and ensure that as many pupils as possible remain in the mainstream sector.

# Glossary

## **Academy**

Academy schools are state-funded schools in England which are directly funded by the Department for Education and independent of local authority control.

## **Basic needs funding**

On an annual basis the DfE / EFA notify local authorities of the monies they will receive for the next 3 years to provide for anticipated increases in pupil place requirements. This funding whilst being awarded in relation to pupil place provision this funding is not specifically ring fenced to the provision of places.

## **Capital funding**

The cost of providing buildings and major elements of expenditure e.g. fixed play equipment, replacement boilers, and major repairs to buildings.

## **Department for education**

The Department for Education is responsible for education and children's services in England. It works to achieve a highly educated society in which opportunity is equal for children and young people, no matter what their background or family circumstances.

## **Early Years education**

The full range of provision, activities and experiences aimed at children prior to their entry into primary school, encompassing education and wider child development, as well as childcare.

## **Education and Skills Funding Agency**

The ESFA is an Executive Agency of the Department for Education (DfE), responsible for the operation of the education capital and revenue funding system and the delivery of capital programmes.

## **Free school**

A Free School in England is a type of Academy, a non-profit-making, independent, State-funded school which is free to attend but which is not controlled by a Local Authority. Under current legislation any new provision built must be a Free School.

## **Primary phase**

Statutory education provision for children aged 4 to 11 years

## **Regional Schools Commissioner**

RSCs are responsible for approving new academies and intervening in underperforming academies and free schools in their area. They act on behalf of the Secretary of State for Education.

The RSCs are accountable to the Schools Commissioner and are supported by a board of 6 to 8 experienced academy headteachers and other sector leaders.

**Revenue funding**

The cost of running schools in day to day expenses.

**School Capacity survey**

Annual data return to the Department for Education setting out LA pupil forecasts, capital projects and proposed capital allocations

**School census**

The school census is a statutory census that takes place during the autumn, spring, and summer terms. Council maintained schools and academies must complete statutory censuses by law unless there's a good reason not to.

**Secondary phase**

Statutory education provision for children aged 11 to 16 years

**Published admission number**

The number of pupils that a school plans to admit in each relevant age group.

# Appendix A: Schools in Oldham

## Primary, Secondary and Special School on maps

School Name	DFE No.	Ofsted URN	Type of School	Faith Designation	VA / VC	Phase	Category
Alexandra Park Junior	353/2000	105626	LA Maintained			Primary	Community Junior Primary
Alt Primary (Harmony Trust Academy)	353/2013	141333	Academy			Primary	Primary Academy
Bare Trees Primary	353/3506	135258	LA Maintained			Primary	Community Infant & Junior Primary
Beal Vale Primary	353/2091	105672	Academy			Primary	Primary Academy
Beever Primary	353/2002	105627	LA Maintained			Primary	Community Infant & Junior Primary
Blackshaw Lane Primary	353/2058	105652	LA Maintained			Primary	Community Infant & Junior Primary
Blessed John Henry Newman RC College	353/4608	136432	LA Maintained	RC	VA	Secondary	Secondary
Blue Coat (Cranmer Education Trust)	353/4600	137133	Academy			Secondary	Secondary Academy
Broadfield Primary	353/2095	105676	LA Maintained			Primary	Community Infant & Junior Primary
Buckstones Primary	353/2085	105671	LA Maintained			Primary	Community Infant & Junior Primary
Burnley Brow Primary	353/2099	105680	LA Maintained			Primary	Community Infant & Junior Primary
Christ Church CE Primary (Chadderton)	353/3341	105707	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
Christ Church CE Primary (Denshaw)	353/3011	105693	LA Maintained	CE	VC	Primary	Voluntary Controlled Primary
Co-op Academy Failsworth	353/4006	144627	Academy			Secondary	Secondary Academy

School Name	DFE No.	Ofsted URN	Type of School	Faith Designation	VA / VC	Phase	Category
<b>Coppice Primary (Focus Academy Trust)</b>	353/2009	139704	Academy			Primary	Primary Academy
<b>Corpus Christi RC Primary</b>	353/3358	105718	LA Maintained	RC	VA	Primary	Voluntary Aided RC
<b>Crompton House CE</b>	353/4605	137294	Academy	CE		Secondary	Secondary Academy
<b>Crompton Primary School</b>	353/2110	133286	LA Maintained			Primary	Community Infant & Junior Primary
<b>Delph Primary School</b>	353/2079	105669	LA Maintained			Primary	Community Infant & Junior Primary
<b>Diggle School</b>	353/2075	105665	LA Maintained			Primary	Community Infant & Junior Primary
<b>East Crompton St George's CE Primary (Cranmer Trust)</b>	353/3355	142271	Academy	CE		Primary	Primary Academy
<b>East Crompton St. James' CE Primary School (Dove Shell Federation)</b>	353/3345	105710	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
<b>Fir Bank Primary</b>	353/2069	146813	Academy			Primary	Community Infant & Junior Primary
<b>Freehold Community Primary Academy (Focus Trust)</b>	353/2008	142425	Academy			Primary	Primary Academy
<b>Friezland Primary</b>	353/2076	105666	LA Maintained			Primary	Community Infant & Junior Primary
<b>Glodwick Infant &amp; Nursery School</b>	353/2047	105645	LA Maintained			Primary	Community Infant & Junior Primary
<b>Greenacres Primary Academy</b>	353/2010	145537	Academy			Primary	Primary Academy
<b>Greenfield Primary School &amp; Nursery</b>	353/2077	105667	LA Maintained			Primary	Community Infant & Junior Primary
<b>Greenfield St. Mary's CE Primary</b>	353/3366	105723	LA Maintained	CE	VA	Primary	Voluntary Aided Primary

School Name	DFE No.	Ofsted URN	Type of School	Faith Designation	VA / VC	Phase	Category
<b>Greenhill Academy (The Harmony Trust)</b>	353/2097	140579	Academy			Primary	Primary Academy
<b>Hathershaw College of Technology and Sport</b>	353/4011	137039	Academy			Secondary	Secondary Academy
<b>Hey with Zion Primary School</b>	353/3012	105694	LA Maintained		VC	Primary	Voluntary Controlled Primary
<b>Higher Failsworth Primary School</b>	353/3504	134784	LA Maintained			Primary	Community Infant & Junior Primary
<b>Hodge Clough Primary School</b>	353/3509	136223	LA Maintained			Primary	Community Infant & Junior Primary
<b>Hollinwood Academy (New Bridge Multi Academy Trust)</b>	353/1101	140388	Academy				Special School
<b>Holy Cross CE Primary School</b>	353/3393	135720	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
<b>Holy Family RC Primary School</b>	353/3400	105724	LA Maintained	RC	VA	Primary	Voluntary Aided RC
<b>Holy Rosary RC Primary School</b>	353/3328	105701	LA Maintained	RC	VA	Primary	Voluntary Aided RC
<b>Holy Trinity CE Dobcross Primary School</b>	353/3009	105691	LA Maintained	CE	VC	Primary	Voluntary Controlled Primary
<b>Horton Mill Primary School</b>	353/2098	105679	LA Maintained			Primary	Community Infant & Junior Primary
<b>Kingfisher Special School</b>	353/7013	143304	Academy			Primary	Special Schools Academy
<b>Knowsley Junior School</b>	353/2080	105670	LA Maintained			Junior	Community Junior Primary
<b>Limehurst Primary School</b>	353/2033	105638	LA Maintained			Primary	Community Infant & Junior Primary
<b>Littlemoor Primary School</b>	353/2044	105642	LA Maintained			Primary	Community Infant & Junior Primary
<b>Lyndhurst Primary School (Focus Trust)</b>	353/2018	142471	Academy			Primary	Primary Academy

School Name	DFE No.	Ofsted URN	Type of School	Faith Designation	VA / VC	Phase	Category
<b>Mather Street Primary School</b>	353/2054	105649	LA Maintained			Primary	Community Infant & Junior Primary
<b>Mayfield Primary School (Cranmer Trust)</b>	353/2034	142550	Academy			Primary	Primary Academy
<b>Medlock Valley</b>	353/2111	133710	Academy			Primary	Primary Academy
<b>Mills Hill Primary School</b>	353/2052	105648	LA Maintained			Primary	Community Infant and Junior Primary
<b>New Bridge Learning Centre (New Bridge Multi Academy Trust)</b>	353/7014	138697	Academy			Post 16	Special School
<b>New Bridge School (New Bridge Multi Academy Trust)</b>	353/7014	138697	Academy			Secondary	Special School
<b>North Chadderton School</b>	353/4027	141248	Academy			Secondary	Secondary Academy
<b>Northmoor Academy (Harmony Trust)</b>	353/2016	142412	Academy			Primary	Primary Academy
<b>OASIS Academy</b>	353/6905	136027	Academy			Secondary	Secondary Academy
<b>Oasis Academy Clarksfield</b>	353/2025	146767	Academy			Primary	Primary Academy
<b>Oasis Academy Limeside</b>	353/2017	137479	Academy			Primary	Primary Academy
<b>Oasis Leesbrook</b>	353/4008	145723	Free School			Secondary	Secondary Academy
<b>Oldham Academy North EACT</b>	353/6906	136115	Academy			Secondary	Secondary Academy
<b>Propps Hall Primary (The Ivory Federation)</b>	353/2071	105663	LA Maintained			Primary	Community Infant & Junior Primary
<b>Richmond Primary Academy (Harmony Trust)</b>	353/2007	139651	Academy			Primary	Primary Academy



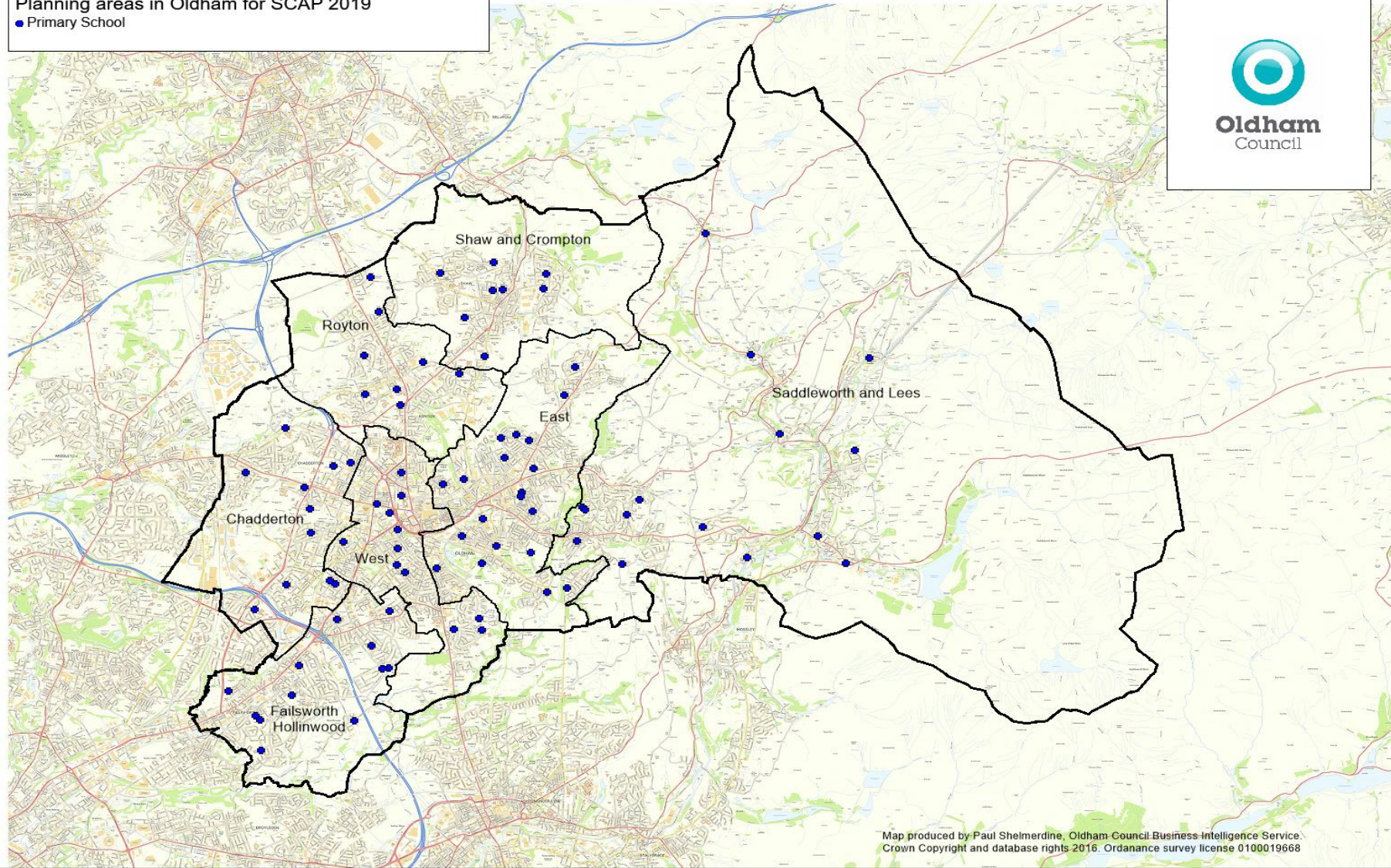
School Name	DFE No.	Ofsted URN	Type of School	Faith Designation	VA / VC	Phase	Category
<b>Roundthorn Primary (Focus Academy Trust)</b>	353/2022	140100	Academy			Primary	Primary Academy
<b>Royton &amp; Crompton (E-ACT)</b>	353/4022	105734	Academy			Secondary	Secondary Academy
<b>Royton Hall Primary School</b>	353/3507	135341	LA Maintained			Primary	Community Infant & Junior Primary
<b>Rushcroft Primary School</b>	353/2065	105659	LA Maintained			Primary	Community Infant & Junior Primary
<b>Saddleworth School</b>	353/4026	105736	LA Maintained			Secondary	Secondary
<b>South Failsworth Primary School</b>	353/2062	105656	LA Maintained			Primary	Community Infant & Junior Primary
<b>Spring Brook Lower (New Bridge Multi Academy Trust)</b>	353/7012	143472	Academy				Special School
<b>Spring Brook Upper (New Bridge Multi Academy Trust)</b>	353/7012	143472	Academy				Special School
<b>Springhead Infant &amp; Nursery School (The Ivory Federation)</b>	353/2078	105668	LA Maintained			Primary	Community Infant & Junior Primary
<b>SS Aidan &amp; Oswald RC Primary</b>	353/3363	105721	LA Maintained	RC	VA	Primary	Voluntary Aided RC
<b>St Agnes CE Primary School</b>	353/3326	105700	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
<b>St Anne's CE Lydgate Primary (Sola Fide Trust)</b>	353/3007	144000	Academy	CE		Primary	Primary Academy
<b>St Anne's CE Royton Primary</b>	353/3353	105715	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
<b>St Anne's RC Primary</b>	353/3401	105725	LA Maintained	RC	VA	Primary	Voluntary Aided RC
<b>St Chad's CE Primary School (Sola Fide)</b>	353/3008	140589	Academy	CE		Primary	Primary Academy

School Name	DFE No.	Ofsted URN	Type of School	Faith Designation	VA / VC	Phase	Category
St Edwards RC Primary School	353/3362	105720	LA Maintained	RC	VA	Primary	Voluntary Aided RC
St Herbert's RC Primary School	353/3364	105722	LA Maintained	RC	VA	Primary	Voluntary Aided RC
St Hilda's CE Primary School	353/3329	105702	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
St Hugh's CE Primary School	353/3325	105699	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
St John's CE Primary School (Sola Fide)	353/2024	146670	Academy	CE		Primary	Primary Academy
St Joseph's RC Primary School	353/3359	105719	LA Maintained	RC	VA	Primary	Voluntary Aided RC
St Luke's CE Primary School	353/3342	105708	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
St Margaret's CE Primary School	353/3333	105705	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
St Martin's CE Primary School	353/3330	105703	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
St Mary's CE High Crompton Primary School	353/3346	105711	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
St Mary's RC Primary School	353/3403	105727	LA Maintained	RC	VA	Primary	Voluntary Aided RC
St Matthews CE Primary School	353/3344	105709	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
St Patrick's RC Primary School	353/3402	105726	LA Maintained	RC	VA	Primary	Voluntary Aided RC
St Paul's CE Primary School	353/3503	131848	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
St Theresa's Primary School	353/2003	136825	LA Maintained	RC	VA	Primary	Voluntary Aided RC
St Thomas CE Leesfield Primary	353/3351	105714	LA Maintained	CE	VA	Primary	Voluntary Aided Primary

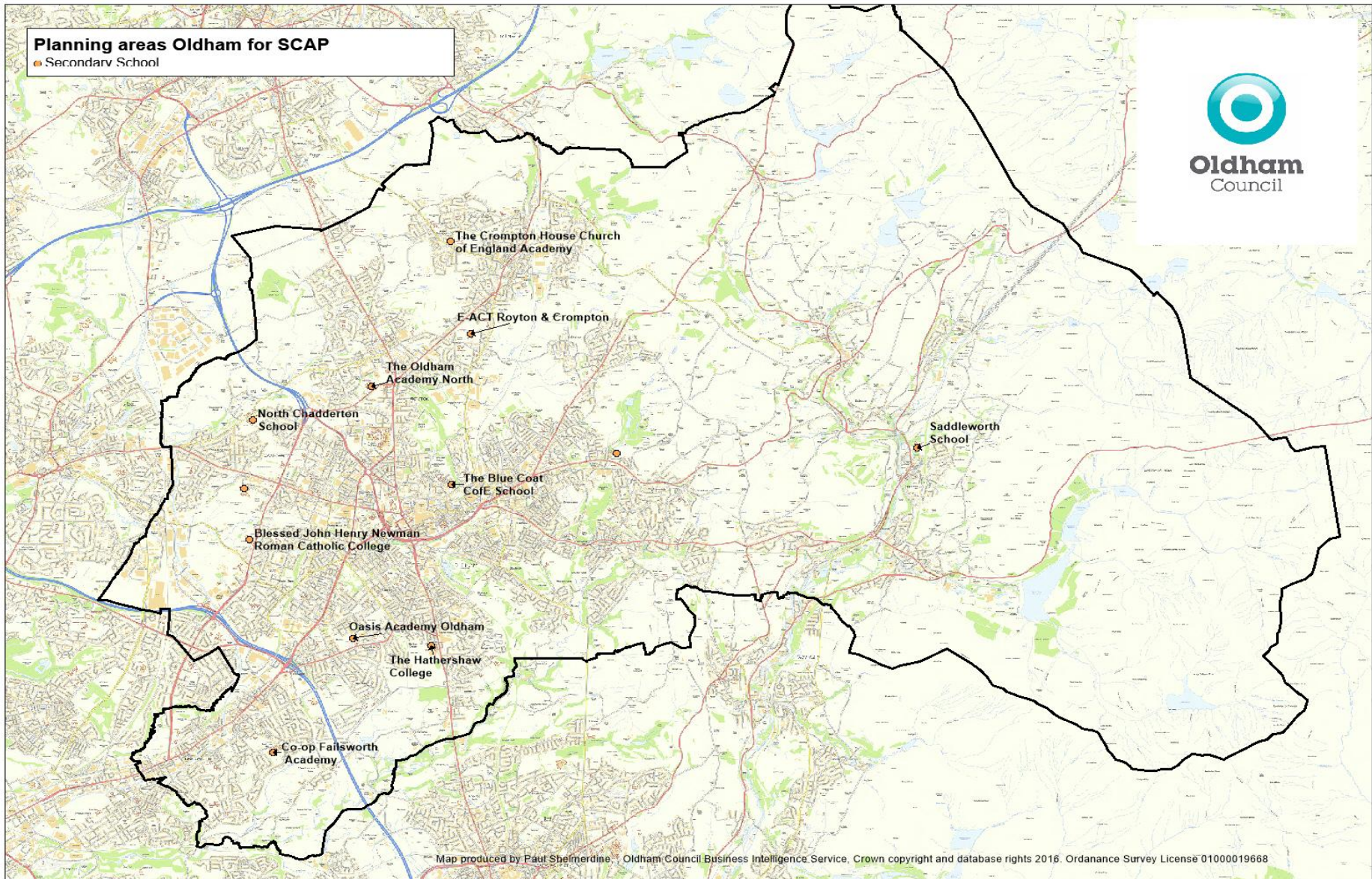
School Name	DFE No.	Ofsted URN	Type of School	Faith Designation	VA / VC	Phase	Category
<b>St Thomas CE Primary Moorside (Dove Shell Federation)</b>	353/3303	105695	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
<b>St. Thomas CE Werneth Primary</b>	353/3315	105698	LA Maintained	CE	VA	Primary	Voluntary Aided Primary
<b>Stanley Road Community Primary School</b>	353/2109	105686	LA Maintained			Primary	Community Infant & Junior Primary
<b>The Kingsland</b>	353/1100	134759	LA Maintained			PRU	Pupil Referral Unit
<b>The Radclyffe Specialist Technology College</b>	353/4028	105738	LA Maintained			Secondary	Secondary
<b>Thornham St. James' CE Primary School</b>	353/3010	105692	LA Maintained	CE	VC	Primary	Voluntary Controlled Primary
<b>Thorp Primary School (Oak Trust)</b>	353/2093	146811	Academy			Primary	Primary Academy
<b>Waterhead Academy (South Pennine Multi Academy Trust)</b>	353/4004	144508	Academy			Secondary	Secondary Academy
<b>Werneth Primary Academy (Pinnacle)</b>	353/3508	140597	Academy			Primary	Primary Academy
<b>Westwood Primary Academy (Harmony Trust)</b>	353/2014	141401	Academy			Primary	Primary Academy
<b>Whitegate End Primary School</b>	353/2064	105658	LA Maintained			Primary	Community Infant & Junior Primary
<b>Willow Park Primary Academy (South Pennine Multi Academy Trust)</b>	353/2023	144507	Academy			Primary	Primary Academy
<b>Woodhouses Voluntary Primary School</b>	353/3005	105688	LA Maintained		VC	Primary	Voluntary Controlled Primary
<b>Woodlands Academy (South Pennine Multi Academy Trust)</b>	353/2020	144025	Academy			Primary	Primary Academy
<b>Yew Tree Community School</b>	353/2113	133712	LA Maintained			Primary	Community Infant & Junior Primary

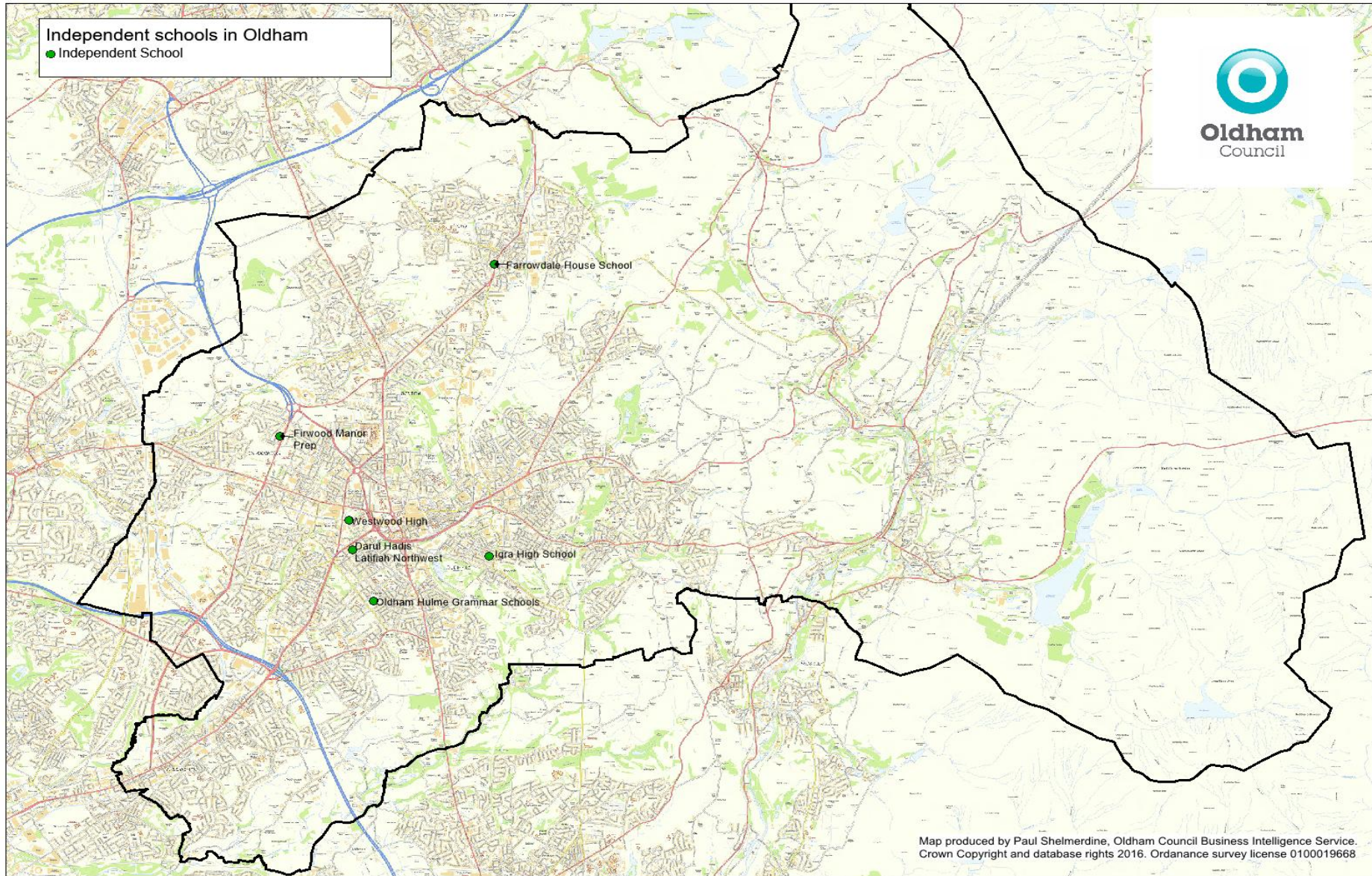
Planning areas in Oldham for SCAP 2019

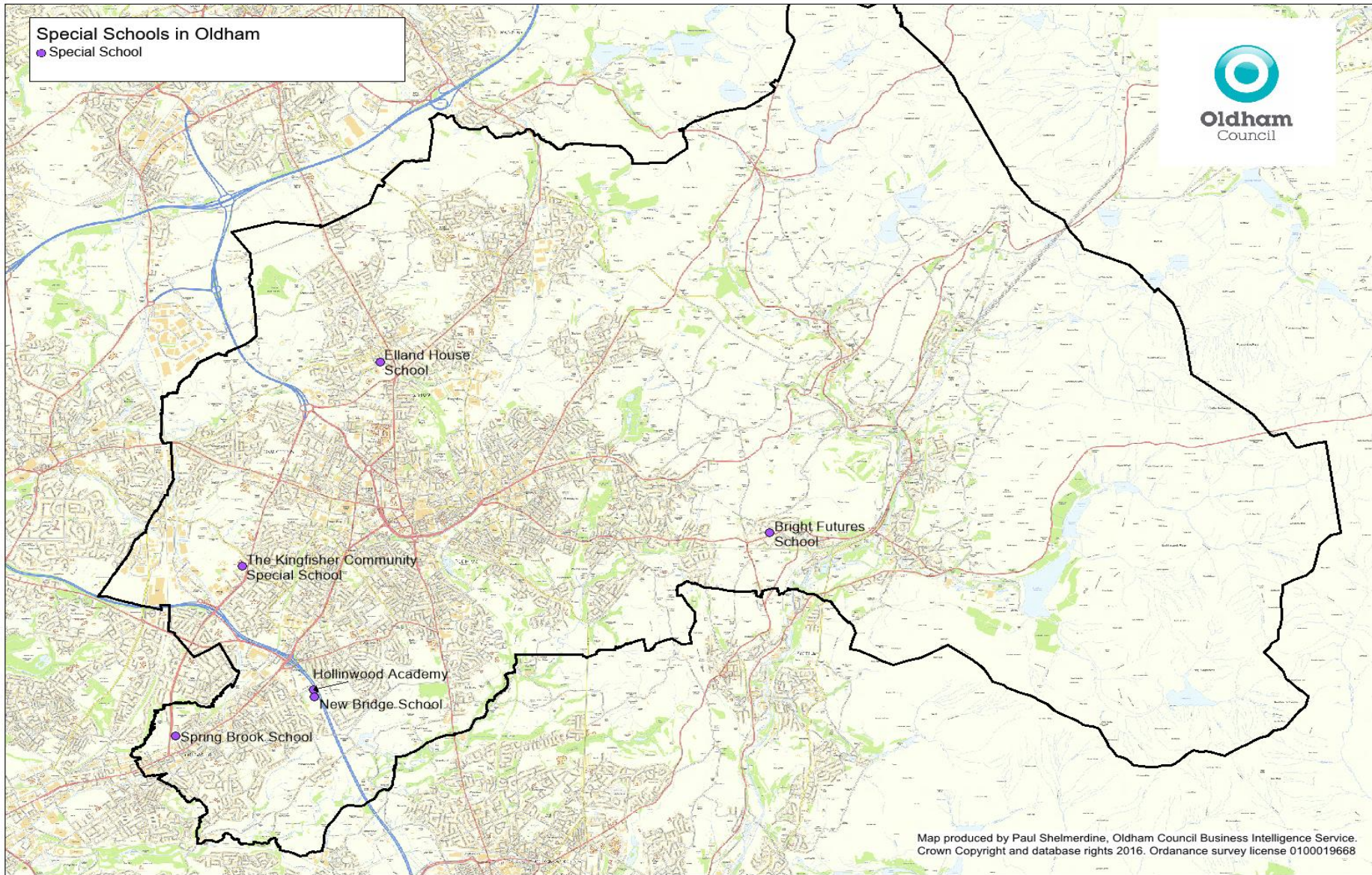
● Primary School

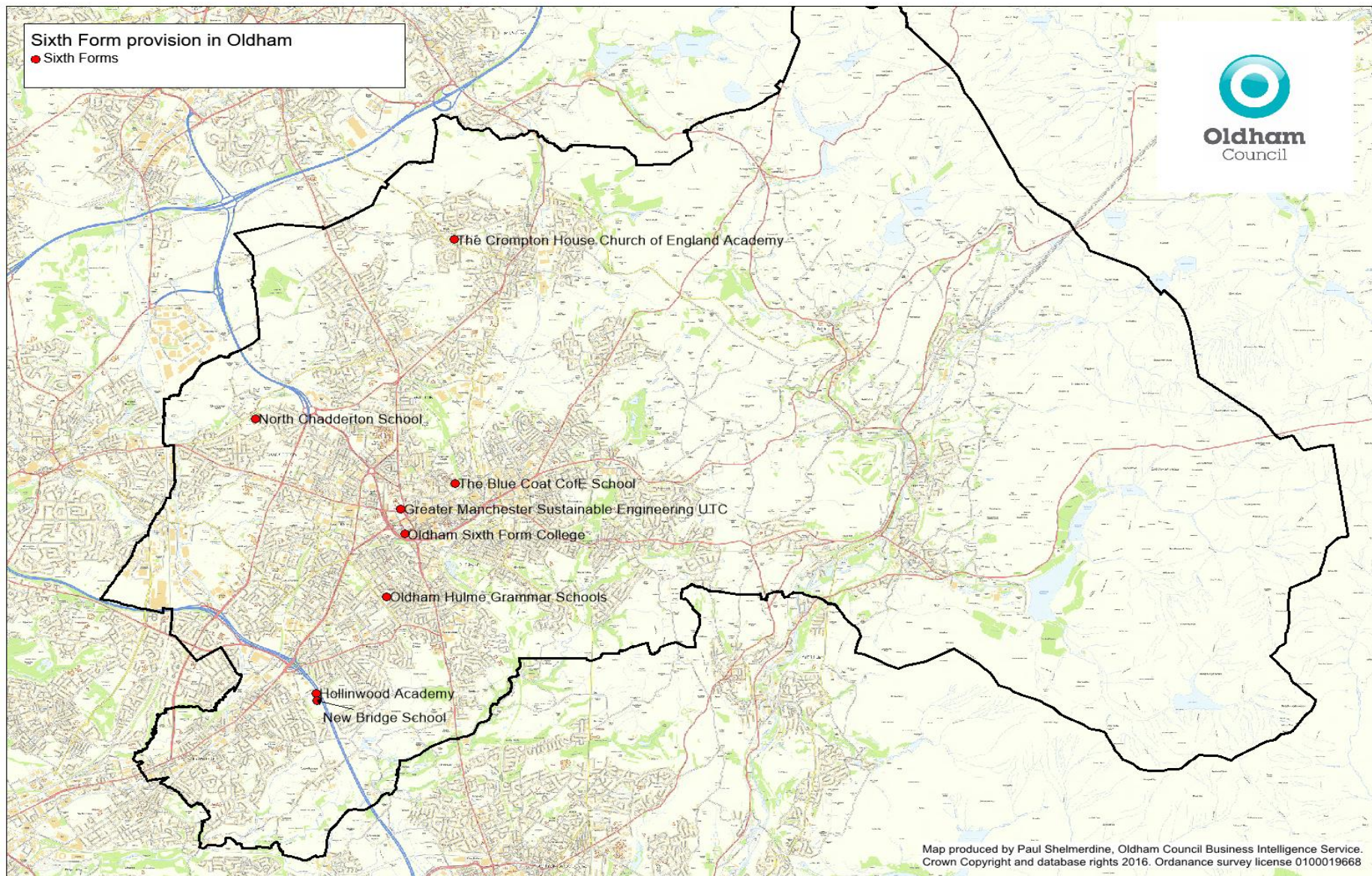


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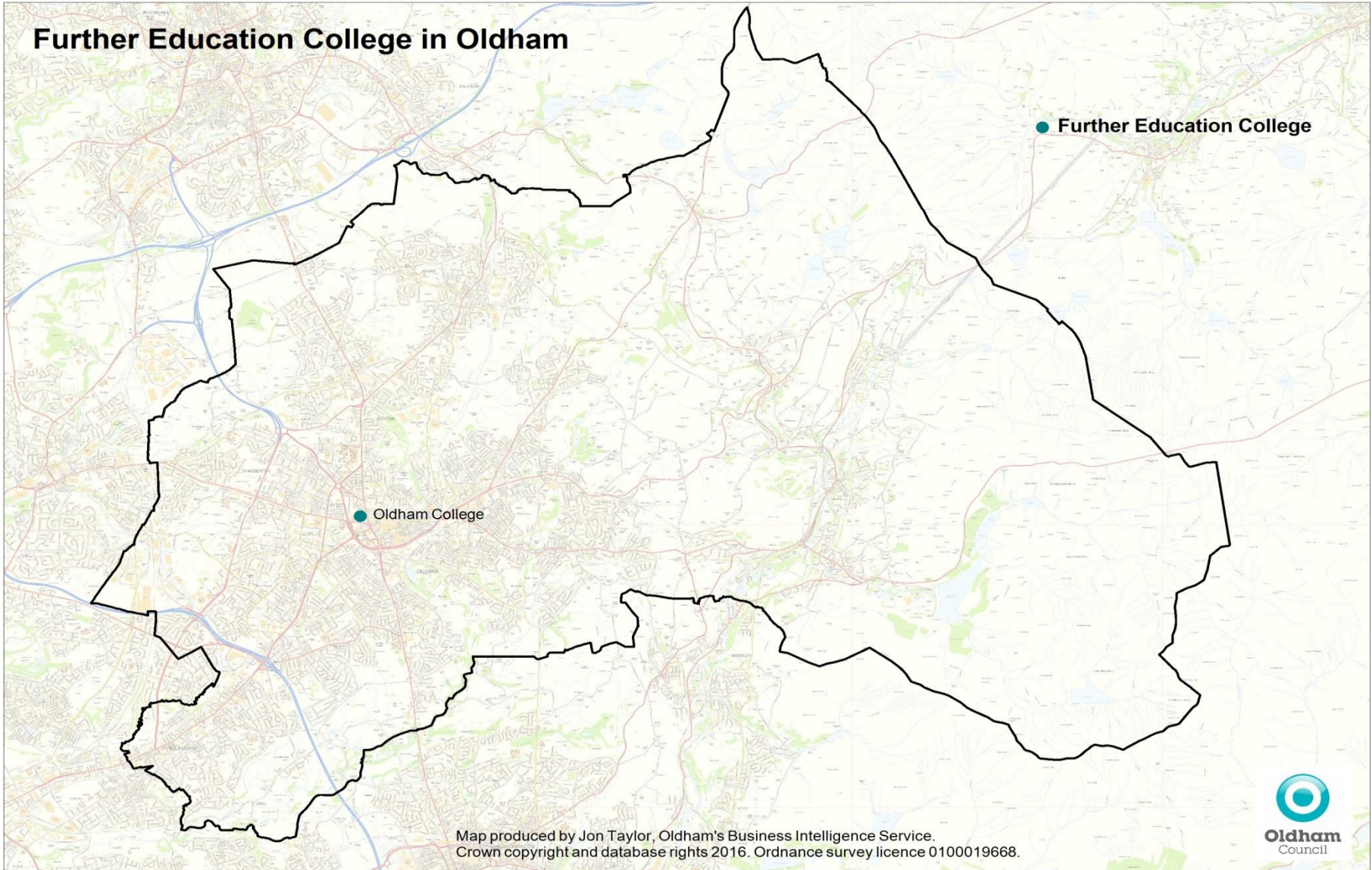








# Further Education College in Oldham



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## Appendix B

# Oldham Local Authority Policy and Guidance on Academy Conversions (2016)

## **Section One: Policy**

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# Academy Conversion Policy

## 1. Introduction

- 1.1 The policy and associated guidance outlines the Local Authority's position with regard to schools who either wish to convert to academy status or those who are required by legislation to convert to academy status. The policy and guidance cannot override the requirements of primary legislation specifically the Academies Act 2010 and the Education and Adoption Bill 2015.
- 1.2 The introduction of the Education and Adoption Bill 2015 requires the Local Authority to set out how it will work with schools who wish to convert to academy status including those schools who as a result of underperformance before eligible for intervention by the Secretary of State. This policy provides a framework for determining Local Authority decisions
- 1.3 Academies become independent of local authorities and conversion leads to changes in responsibilities, finance and working relations between local authorities and academies. This policy and guidance outlines the approach that will be taken by the Local Authority and offers practical advice and guidance on how the Local Authority will manage conversion and how governing bodies should approach the issue of conversion.
- 1.4 The educational vision of the Local Authority includes the whole family of schools in Oldham regardless of whether they are academies or maintained schools. This vision envisages all schools, stakeholders and the Local Authority working together in partnership to provide the best possible outcomes for all children and young people.
- 1.5 Secondary Head Teachers and Primary Head Teachers continue to discuss matters and work together in their representative groups (OASHP) and Executive Primary Heads Group regardless of their school status. The Local Authority's policy will be to continue to include all Oldham Schools in its communications, consultations and discussions for the benefit of all Oldham children and young people.
- 1.6 The Local Authority recognises that as a result of the academy conversion agenda that its overall revenue funding received from the Education Services Grant (ESG) will reduce as academies receive the Education Services Grant as part of their revenue funding. The current amount for 2015-16 of £87 per pupil would have been used by the Local Authority for statutory duties relating to services relevant to the Education Services Grant. The LA undertakes that it will work to mitigate any financial or job losses by promoting the services and those of its strategic partners with academies in order to ensure the highest level of buy back possible. The LA will ensure that where appropriate contracts are novated as part of the CTA (Commercial Transfer Agreement).
- 1.7 The LA is the employer for staff in Community Schools and Voluntary Controlled schools and the monitoring and maintaining authority for all non-

academy schools. There is an expectation that all schools will inform the LA if they are considering voluntary conversion to academy status.

## 2. Definitions and Abbreviations

- 2.1 DfE means The Department of Education
- 2.2 PFI means Private Finance Initiative
- 2.3 TUPE means Transfer of Undertakings Protection of Employment Regulations
- 2.4 CTA means Commercial Transfer Agreement
- 2.5 CIPB means Capital Investment Programme Board
- 2.6 CIF means Condition Improvement Fund
- 2.7 ETO means Economic, Technical and Organisational
- 2.8 NJC means National Joint Council
- 2.9 STPCD means the School Teachers Pay and Conditions Document
- 2.10 ICO means Information Commissioners Office
- 2.11 LA means Local Authority

## 3. Conversion costs

- 3.1 Converting schools are entitled to a DfE grant of £25,000 to prepare for conversion (£37,000 for PFI schools). The local authority receives no additional funding in order to deal with the financial impact and increased workloads created by and associated with the conversion work. Schools will be charged for work over and above that normally undertaken by the LA.
- 3.2 As the ceding employer, and in order for each academy conversion to happen, the Local Authority is obliged to carry out a number of functions on behalf of the school, these functions include:
  - Providing initial information to the DfE
  - Leading or supporting the formal TUPE process
  - Carrying out the financial reconciliation and closure of accounts
  - Preparing documents for the transfer of land and assets
  - Liaising with the schools appointed solicitors on the CTA (Commercial Transfer Agreement)
  - Preparation of documents for the transfer of pensions
- 3.3 These activities involve a number of different departments with the LA and require a considerable amount of officer time. There is therefore a not inconsiderable cost to the Local Authority whenever a school becomes an Academy. Therefore the Local Authority will make the following charges for Academy Conversions to cover these costs:

- Converter Academies £4.5 K
- Sponsored £6.5 K
- PFI Conversion costs will be agreed on a case by case basis.
- The LA will not fund additional legal costs connected with the conversion of PFI schools to academy status.

**3.4** In addition to the above, schools should note that Unity Partnership will invoice schools for any fees associated with property transactions.

## 4. Data and Records

**4.1** The LA is responsible for the accurate recording and safety of all pupil data and records prior to the schools conversion to academy status.

**4.2** As part of the CTA (Commercial Transfer Agreement), the LA will require all converting schools to deliver to the LA all ex-pupil records boxed, logged and stored by destruction date and alphabetically. A list of contents of each box must be attached to each box.

**4.3** The LA will expect all converting schools to comply with the Education (Pupil Information, England) Regulation 2005 and any associated guidance produced by the ICO.

**4.4** The LA will expect that Academies will share with them all data and records relevant to pupil wellbeing and performance.

**4.5** A data sharing agreement will be drafted and agreed with each new academy to enable the sharing of financial and pupil related data. This will form an appendix to the CTA for each conversion.

## 5. Council's Preferred Sponsor

**5.1** The LA will work closely with schools and the RSC (Regional Schools Commissioner) to ensure that academy sponsors share the LA's vision for high performing schools which are responsive to local needs and offer a valuable contribution to the borough education offer to parents.

**5.2** Oldham Local Authority is an ambitious authority and good and outstanding schools are a key part of the authority's vision for a thriving forward looking and prosperous borough.

**5.3** The Local Authority recognises that the educational landscape is changing at a fast pace and will work in partnership and co-operation with a range of autonomous providers of education and related services.

**5.4** The Local Authority recognises the value of a wide range of provision and great strides have been made in the primary sector with 95% of provision for primary pupils either 'good' or 'outstanding'. It is the Local Authority's vision that this success be quickly replicated in the secondary sector and to that end the Local Authority is committed to working in partnership with a range of providers. As part of the educational offer to Oldham parents the Local Authority expects academy sponsors to demonstrate the following:-

The ability to:

- Secure effective leadership which will demonstrate an ambitious vision for the school and high expectations for what every pupil and teacher can achieve and set high standards for quality and performance including management of learning and teaching.
- Offer sharp challenge and the impetus to act where improvement is needed based on clearly identifying strengths and weaknesses.
- Promote rigour in school self –evaluation enhancing a school's capacity to drive its own improvement
- Secure rapid improvement in attainment for all pupils
- Offer targeted professional development to secure good or better teaching throughout the school
- Develop a curriculum which meets children's needs, engages them and prepares them for a variety of career paths.
- Gain the confidence of the community in the school and position the school in order that it plays a significant part in supporting families to meet high aspirations for the all pupils
- Build on existing partnerships with parents and carers and the community and ensure that all stakeholders are valued partners in the life of the school
- Ensure that residents and service users actively inform decision making and co-produce services with communities in line with co-operative values and principles
- Ensure the environs of the school are fit for learning and accessible to the community
- Work in partnership with the Local Authority to enable the LA to fulfil its statutory responsibilities with regard to safeguarding, SEN, school performance outcomes and school admissions. This includes an agreed process for sharing key information with the LA.



In addition the Local Authority would expect sponsors to demonstrate:-

- A willingness to adhere to local terms and conditions of employment (including signing up to the Fair Employment Charter and the Living Wage)
- A willingness to engage local professional associations and a commitment to developing that engagement.
- That they understand and can pay heed to the values and aspirations of the local community and can contribute to the wider community served by the school.
- That they will engage in meaningful consultation with all stakeholders regardless of whether the school is eligible for intervention or converting on a voluntary basis.
- That they will actively engage with the work of the OESC (Oldham Education and Skills Commission)

## 6. Capital Works

**6.1** The allocation of funds to undertake capital maintenance work on schools are proposed by the Local Authority CIPB (Capital Investment Program Board). This body is not a decision making body but its role includes recommending funding allocations and priorities for capital works that are required across the school estate. Any works identified need to be approved either by the Cabinet Member for Education or for works of a value in excess of £0.400m full Cabinet. As such, schools converting to or considering converting to academy status should not assume that because works may feature in the CIPB Plan that they are agreed by the Council. Only works agreed by the Cabinet Member or by Cabinet if the value is over £0.400m can be deemed to be agreed by the Local Authority.

**6.2** Academies and schools with a signed academy order are able to gain funding for capital projects through the Condition Improvement Fund (CIF). The LA strongly encourages schools in the process of conversion to bid for funding from this source as a matter of course prior to making any approaches to the LA for funding. The LA position on funding for Capital Maintenance works will take into account the following factors prior to any project being fully or partly funded:-

- Prioritisation according to need and in relation to the needs of other schools utilising condition survey information, currently this means that only Priority 1 projects will be considered.
- The availability of capital maintenance funding.
- The availability of the schools own funding, including any devolved capital funding

- The degree of certainty and likely timescale for transfer to academy status.
- Whether the school is intending to become part of a local or national Academy Trust or is converting in its own right
- School performance issues
- The extent to which the school supports other schools
- The local regeneration and place shaping context.
- The ability of the converting Academy to access future funding via the Condition Improvement Fund (CIF)
- Any significant health and safety or safeguarding initiatives or concerns.

The LA will not fund any works once a school has attained academy status.

## 7. Financial Considerations

- 7.1** The Governing Bodies of schools converting to academies will be responsible for the school budget and financial management arrangements in the period leading to conversion.
- 7.2** School should not enter into any new leasing agreements or contracts in the name of the old school that extend beyond the conversion date. Advice should be sought regarding any existing leasing arrangements to ensure these are dealt with (which may mean termination and re-establishment) in the correct way.
- 7.3** The school will need to have an up to date copy of the school inventory.
- 7.4** Schools converting to academies need to ensure the only transactions that appear in their old school budget relate to the period before the school converts to an academy. Transactions relating to the academy should not be charged to the old school budget.
- 7.5** Schools looking to convert to an academy need to ensure they buy into any service level agreements up to the proposed conversion date and set up new service level agreements with services for the academy after conversion.
- 7.6** When the conversion of the school is approved a budget plan should be calculated up to the date of conversion.
- 7.7** If a school has surplus balance when it converts to academy status, the 2013 Regulations provide that:

*The LA must determine and notify the amount of that surplus within four months of the date of conversion.*

- 7.8** If a school is a converter academy and is in deficit the EFA will recover the deficit through the General Annual Grant
- 7.9** The Local Authority will work closely with schools to manage any potential deficit at conversion.
- 7.10** Schools converting to academy status that have chosen to operate their own bank account with either the Local Authority bankers or an approved financial institution of their choice need to ensure all direct debits/credits are cancelled, the bank account is closed and any stationary (unused cheque books etc) are returned to the LA. Monthly cheque book returns will still need to be completed and balanced by the school until the bank account is closed. Schools converting to academy status that have an imprest account need to ensure the bank account is closed and any stationery is returned to the LA. Schools will also need to ensure that the initial imprest advance is returned to the LA.

## **8. TUPE and Service Recognition**

**8.1** Staff in schools that are re-designated as academies have their employment transferred from one establishment to the other, following the Transfer of Undertakings (Protection of Employment) TUPE Regulations. The LA directly and via its HR Service provider (Unity Partnership) will support converting schools to ensure that correct processes are followed. This will include the following:-

- Due diligence work on HR records and personal data.
- Completion (where possible) of all outstanding HR issues
- Support and attendance for all consultation meetings with staff and associated paperwork.

**8.2** The Local Authority will not fund any staffing changes or school restructures that occur for ETO reasons as a result of measures taken by the Academy Trust in connection with the conversion.

**8.3** Staff transfers from an LA school or voluntary aided school to an academy have ALL employment rights protected upon transfer, however if a member of staff accepts a new academy contract or subsequently moves of their own volition back to the Local Authority the contractual rights that transfer are different for support and teaching staff.

### **8.4 Support staff**

NJC terms are protected because of TUPE and continuous service is protected by the Modification Order. Academies are members of the Modification Order

and as such should an employee return back to the Local Authority from an Academy their continuous service will be recognised for calculation of the following:-

- Redundancy pay entitlement
- Occupational maternity pay
- Occupational sick pay
- Annual leave entitlement

## **8.5 Teachers**

STPCD (School Teachers Pay and Conditions) and Burgundy Book are primarily concerned with LA employment only. Continuous service for the purposes of calculating Redundancy pay entitlement is recognised under the Modification Order, however the following elements would not be recognised by the LA for teachers who return from an Academy to an LA School.

- Teacher's maternity pay starts from zero as teachers maternity rights are linked contractually to LA service and continuity is broken once a teacher leaves LA employment.
- Teacher's occupational sick pay is also linked to LA service and so continuity is broken as soon as they leave the LA. Employment with the Academy will not count. However sickness entitlement is based on aggregated LA service therefore prior LA service will be recognised but not the intervening period of employment with the Academy.

In the event of any member of staff returns to the LA as a result of a TUPE transfer from the Academy then all employment rights and continuous service are again protected (in reverse) and in accordance with TUPE legislation.

## **9. Pensions**

**9.1** With regard to the treatment of existing pension the liabilities the following will apply in respect of schools that have converted to academy status and free schools within the borough:-

**9.2** The Local Authority will give consideration to pension pooling arrangements for converting Academies and Free Schools within the borough of Oldham in respect of non-teaching employee pensions. This will be subject to an assessment of the following criteria:-

- A commitment to adhere to the criteria listed in section 5 of this policy.
- The Local Authority is satisfied that such schools are financially secure and can demonstrate that they can meet their obligations as a scheme employer.

- The extent to which Academy or Free School Sponsors will assist with the mitigation of any residual local authority risks that are associated with Pension Fund transfers, pooling and Admitted Body arrangements.
- That the establishment of such schools is aligned to the Council's overall strategy for pupil place planning.

## 10. PFI Schools

- 10.1** The Local Authority has a number of PFI (Private Funded Initiative) schools within the borough. Three secondary schools in Oldham have either been built or refurbished using PFI funds.

The conversion process is more complex as these schools operate under PFI contracts. To allow these conversions to take place the LA, Governing Body, Academy Trust, DfE and PFI Contractor must enter into a suite of contracts to reflect the schools change in status and transfer the assets required for the Academy Trust to operate the school.

- 10.2** To enable PFI schools to convert to academy status the LA will require that the Academy Trust enter into the following agreements.

- 1) Commercial Transfer Agreement (CTA). This covers the transfer of staff, assets and contracts held by the Governing Body and the LA in respect of the converting school to the Academy Trust.
- 2) Lease Agreements to grant a 125 year leasehold to the Academy Trust.
- 3) A 'School Agreement' to flow down the relevant rights, obligations and liabilities enjoyed by the LA pursuant to the Project Agreement to the Academy Trust
- 4) Deeds of Variation to the Project Agreement to vary the Project Agreement in recognition of the schools change in status. The LA will also provide a LGCA Certificate in respect of this agreement.
- 5) Principal Agreements to provide a guarantee from the DfE in respect of some of payment liabilities of the Academy Trust in the event of non-payment.

- 10.3** The LA can contribute towards the annual repayments (a contribution towards the building running costs/facilities management charge) and to capital repayments (affordability gap). In the event of any of these schools either being subject of an Academy Order or opting to convert to academy status then neither the Academy nor the local authority (LA) should be better or worse off financially than if the Academy had remained an LA maintained school.

LAs and schools will honour the payment commitments that were agreed at the time that the PFI contract was signed. The contract remains between the LA and the contractor, regardless of the number of schools within that contract converting to academy status.

## 11. Leases

**11.1** As part of the conversion process a schools land and buildings will transfer to the academy on a 125 year lease. The terms of such leases will be as required by the DfE and the following will be key features of all leases to academies;

- The property can only be used for educational purposes set out in the Academy Trusts 'Article of Association'.
- The lease cannot be assigned to another body without the permission of the Secretary of State.
- The lease will allow the Local Authority to forfeit the lease and re-enter the Property if the Academy Trust fails:-
  - To use the property for purpose originally agreed
  - Becomes dissolved, struck off or removed from the Register of Companies or otherwise ceases to exist.
- The lease will automatically end if the Academy funding agreement is terminated and there is no replacement funding agreement for educational purposes.
- In the event of the lease being forfeited or ending due to some other reason the site would revert back to the Council as the freehold owner

**11.2** Where the LA considers that a school has land surplus to its needs the LA will seek to retain any surplus land this land forms part of a strategic need related to the delivery of educational or children's services.

**11.3** The LA will, as part of any lease negotiations seek to protect the interests of third parties such as community groups or before and after school clubs who share facilities with schools seeking academy status.

**11.4** The LA reserves the right to include or exclude land beyond the school's physical boundary if that land formed part of the original school footprint.

## 12. Sources of Information and Support

**12.1** Department of Education website - [www.education.gov.uk](http://www.education.gov.uk)

**12.2** Finance (Liz Caygill - [liz.caygill@oldham.gov.uk](mailto:liz.caygill@oldham.gov.uk))

**12.3** HR & General Information (Andy Collinge – [andy.collinge@oldham.gov.uk](mailto:andy.collinge@oldham.gov.uk))

**12.4** Legal (Doug Chisholm – [doug.chisholm@oldham.gov.uk](mailto:doug.chisholm@oldham.gov.uk))

**12.5** Pensions (John Hoskins – [john.hoskins@oldham.gov.uk](mailto:john.hoskins@oldham.gov.uk))

**12.6** Pupil Records (Tim Hanstock – [tim.hanstock@oldham.gov.uk](mailto:tim.hanstock@oldham.gov.uk))

**12.7** Capital Works (Peter Wood – [peter.wood@oldham.gov.uk](mailto:peter.wood@oldham.gov.uk))

## 13. Interpreting the Policy

In the event of a dispute regarding the interpretation of this policy, advice must be sought from the LA Legal Department. The LA may seek further advice before issuing any guidance.

Any advice regarding interpretation will automatically become incorporated into this policy.

## Section Two: Guidance

### Guidance for Schools on Academy Conversion.

<b>Introduction and Content</b>	Page 14
<b>The Academy Decision Making Process and Consultation</b>	Page 15
<b>Working Party Considerations (Pre-Consultation)</b>	Page 17
<b>Academy Conversion: Considering Differences, Implications and Costs</b>	Page 19
<b>Academy Conversion: The Application Process</b>	Page 31
Appendix A – The Decision Making Process Flowchart	Page 34
Appendix B – Pro-forma Consultation Document	Page 35
Appendix C – Unit Costs	Page 39
Appendix D – The process from Resolution to Conversion	Page 40
Appendix E – Data Sharing Agreement	



## Introduction and Content

This guidance has been designed to support Governing Bodies in giving full consideration to all implications of conversion to academy status, and whether it is an appropriate step for the school.

Conversion to academy status is probably one of the most important decisions any Governing Body can make and has significant and far reaching implications for the school.

There are a number of different forms academy conversion can take and this guidance is specifically focused at those schools who are considering becoming 'converter academies', however schools who are eligible for intervention should also follow this guidance in order to ensure that the conversion process is well managed and full consideration is given to all the implications of conversion and the necessary practical steps that need to be taken.

There are several requirements in order for a school to be able to convert to academy status and these can be summarised as follows:-

- The Academies Act 2010 allows maintained schools judged as Outstanding or Good by Ofsted to convert to Academy status.
- Conversion follows governor led local consultation, and governor application to the Secretary of State for approval to convert.
- Converter academies are not new schools and retain their original DfE number.
- Schools that are not judged to be Outstanding or Good by Ofsted can apply to become an academy, however they would need an approved sponsor in order for this to become a possibility.
- The process typically takes around 3 to 4 months to complete.

This guidance is non statutory but represents good practice and assists Governing Bodies in giving full consideration to the key aspects of conversion which include:-

- The decision making process.
- Consultation
- Cost and practical implications
- The application process

# Academy Conversion Guidance

## The Academy Decision Making Process and Consultation

Initial Considerations

### Step One

The GB should consider the following:

- 1 The views of Governors
- 2 The view of the Head Teacher and views expressed by staff governors about the likely feelings of staff.
- 3 In the case of VC/VA schools, obtain the view of the diocese.
- 4 Invite the Local Authority to discuss the process with the full Governing Body.

If the view is that the GB wish to explore academy conversion, they should move to step two.

### Step Two

The Governing Body (GB) sets up a working party of 2-3 governors to obtain and consider more details and make recommendations to the GB.

The recommendation may be that:

- On balance there are clear advantages and the GB has the capacity to take on academy status now (If this is the recommendation, the working party should draft a consultation document for GB to approve).
- On balance the advantages outweigh the disadvantages but the GB and school is not yet ready to take on extra responsibility and will need to be strengthened in a number of areas.
- On balance there are insufficient advantages – and significant disadvantages – to justify continued interest.

### Step Three

Working party reports back to GB with recommendations.

### Step Four

GB considers working party recommendations and decides:

1. to proceed to consultation OR
2. to ready itself to consider academy status later OR
3. not to proceed with the proposal.

## **Step Five**

In the case of (1) the working party should proceed as follows:-

- a. Consult stakeholders.
- b. The GB should consider stakeholder responses
- c. If following consultation exercise, the GB wish to pursue academy status the GB should record their decision and communicate this to stakeholders.

## **Step Six**

In the case of (2) the working party should proceed as follows:

1. Identify training needs
2. Arrange for governors (and senior staff) to attend relevant training
3. Identify organisational (and staffing) requirements
4. Decide and implement strategy to strengthen the organisation and staffing
5. Meanwhile, keep abreast of developments which may change the advantages vs. disadvantages assessment.
6. When governors feel the time is right, the GB will need to check that:
  - a. The balance of advantages points to academy conversion.
  - b. The GB and school now have the capacity to convert to academy status.

There is a decision making process flow chart at **Appendix A**

There is a suggested pro-forma for initial consultation at **Appendix B**.

## Working Party Considerations (Pre-Consultation)

Issue	Suggestions	Notes
Who to notify/consult?	Foundation/Trust Parents Pupils Staff LA: Staff unions/associations Diocese Other local schools	Do we have contacts for all these groups before proceeding to consultation? Staff don't have to be consulted except for TUPE later in the process Consulting the full list would be considered good practice
When?	Before the GB makes its final decision	Avoids the perception of the decision already having been taken
How to inform?	Hard copy letter On-line website Newsletter Meetings – School Council, Parent Forums, staff meetings Community or parish magazines	Who decides on the way in which groups are informed? GB/Working Party/school Questions raised in Meetings of e.g. School Council, Parent Forums. The GB should publish the answers any formal questions.
What information should be provided	We suggest you consult parents, students, staff and local partners. In order for the consultation to be meaningful, full information on the implications would need to be provided. Information could include: <ul style="list-style-type: none"> <li>• main advantages identified by the GB – including what you would do differently with constraints removed</li> <li>• the disadvantages that the GB considered</li> <li>• details of the proposed academy arrangements;</li> <li>• details of the proposed governance arrangements including details of the trustees of the charity which will enter into the Academy arrangements and details of the composition of the GB;</li> <li>• any proposed changes in the arrangements for the curriculum,</li> </ul>	The conclusions you reach as you consider each of the 'differences and implications' should have been noted so that they can be included in your consultation document.

Issue	Suggestions	Notes
	<p>for special educational needs, for pupil discipline, exclusion and for complaints, and confirmation that there will be no change in the admissions arrangements;</p> <ul style="list-style-type: none"> <li>• details of any additional obligations and costs which fall on the school if it became an academy; and details of the support that is proposed to be given to other schools and any other possible effect on other schools</li> </ul>	
Timescale	Deadline for responses	Allowing reasonable time for stakeholders to respond while maintaining momentum
How to collect and collate views?	<p>Do we know what we want to get out of the pre consultation process?            What kind of information would be useful?            Methods of collection – questionnaire/statement inviting comments/interviews/meetings? Sample size?            Responses to go to....</p>	Once you have the data, will it be easy to analyse?
Reporting the results of consultation to the GB	<p>Agree working party members who will collate responses.            Schedule working party meeting to agree report for GB</p>	

## Academy Conversion - Considering Differences, Implications & Costs

Before focusing on the differences, governors should be reminded of the things that remain the same:

- Academies are still part of the community. They serve children and families in a particular area and they retain the same responsibilities as any maintained school as part of the learning community. Governors are advised to consider how they ensure their institution is seen as part of the community, whatever the decision they make.
- The Headteacher still needs to work in partnership with governing body on strategic matters.
- Academies are still subject to the law on employment, equality, admissions and special educational needs.
- Academies are required to follow the same rules over pupil exclusion as maintained schools.
- Academies need to operate a complaints policy in the same way as any maintained school.
- Academies are still subject to Ofsted inspection.
- Academies are still subject to Freedom of Information legislation.

In considering the differences described below, governors are advised to refer to the Governing Body's vision and values. In considering each of the differences, it is suggested that governors ask themselves the questions listed in the second column. Some of the differences may mean additional income and/or additional costs/ Additional staff time may be required for the associated tasks. The fourth column allows governors to set out more clearly the possible or probable financial implications for their own school. Governors should not be expected to make a decision to proceed without the best estimate of financial implications.

### School Performance

Differences	Questions	Notes	Indicative costs
Freedom from National Curriculum – although still required to be 'broad and balanced'	Do we currently feel constrained? What would we do differently? How would our children benefit? On balance what do we gain?	Schools already have more freedom from the national curriculum than people realise. Academies must include English, Maths and Science in the curriculum for all students up to the age of 16. It is important to take account of the 'The National Curriculum 2014' when considering options.	
Freedom from	Do we currently feel	Schools already have	

Differences	Questions	Notes	Indicative costs
the LA	<p>constrained?            What would we do differently?            How would our children benefit?            On balance what do we gain?</p>	<p>considerable autonomy with issues such as finance and staffing.</p> <p>A major part of the school's budget is generated through pupil formula funding.            Spending decisions are then delegated to schools.</p> <p>An academy will need to, for example:</p> <ul style="list-style-type: none"> <li>• Ensure that leadership is secure when key leaders are out of action.</li> <li>• Have robust emergency business continuity plan.</li> <li>• Replace external audits with robust internal systems e.g. H&amp;S</li> <li>• Apply for a number of registrations e.g. data controller</li> <li>• Purchase legal advice on for example complex freedom of information requests and conflict resolution situations</li> <li>• Ensure it maintains a working relationship with the LA School Performance Team.</li> </ul>	
Academies are expected to	Do we already work in partnership?	Formal contractual arrangement with SoS	

<b>Differences</b>	<b>Questions</b>	<b>Notes</b>	<b>Indicative costs</b>
support other schools	Might we prefer to federate/collaborate? What more can we offer and to which school? What effect would becoming an academy have on our local and partner schools?	DfE contact person helps broker the support for other schools	

### **Governance**

<b>Differences</b>	<b>Question</b>	<b>Notes</b>	<b>Indicative costs</b>
GB no longer subject to existing statutory governance regulations but following them is deemed to be good practice	Do we feel constrained? What would we do differently? How would our children benefit? On balance what do we gain?	GB has to agree articles of association, with the SoS, which contain operating rules.	
Composition of GB may be different as outlined in the Articles of Association	Do we feel constrained? What would we do differently? How would our children benefit? On balance what do we gain?	GB/Trust can retain its current members if it so wishes but would need to agree it in a new article of association agreed with DfE.  There should be at least two parent governors. Up to a third of an academy's GB may be made up of staff governors (including the Principal).  Schools who join a MAT (Multi Academy Trust) should not that Trusts are under no legal obligation to have a GB in each school within the trust.	



<b>Differences</b>	<b>Question</b>	<b>Notes</b>	<b>Indicative costs</b>
Principal (Headteacher) is governor ex-officio (no opportunity to opt out)	Will this make any difference?	Will only affect headteachers who have previously decided not to be governors	

## HR

<b>Differences</b>	<b>Question</b>	<b>Notes</b>	<b>Indicative costs</b>
The Academy Trust is the employer of staff	Have we considered the implications? Do we currently feel constrained? What would we do differently? How would our children benefit? Will we need to spend more than we do currently on HR advice? On balance what do we gain?	Only different for community and VC because in VA and Foundation schools the GB is already the employer.  Any redundancy costs must be met from academy budget. The Trust/ governing body is the legal respondent in Employment Tribunal Cases and other legal challenges.	
Ability to set own pay and conditions	Have we considered the implications? Do we currently feel constrained? Do we use current flexibilities? What would we do differently? How would our children benefit? On balance what do we gain?	STPCD is set in law, so maintained schools must work within it – Academies do not have to comply. However, TUPE transfer applies for existing staff so some pay and conditions are likely to apply initially, but may change subsequently following consultation with staff and unions.  In practice very few academies have deviated	

Differences	Question	Notes	Indicative costs
		from national or local terms and conditions.	

### Finance

Differences	Question	Notes	Indicative costs
Academies will receive funding from the LA to pay for 'EHC' plans for mainstream and early years pupils. Funding is also paid by LA's for 3 and 4 year old children accessing free entitlement to early education.		In addition to the individually assigned resources (IAR) i.e. Notional SEN, for pupils requiring more support above 9.5 hours, academies will receive funding for SEN pupils from the High Needs Block. Academies must comply with 'SEN obligations imposed on governing bodies of maintained schools'.	
		<p>Note: Funding of Academies is for the academic year – not financial year.</p> <p>Academies will still need to purchase services. They may be able to purchase services from LA.</p> <p>Do we need to have extra staff and governor time to deal with additional decisions. The DfE is recommends that a qualified accountant is employed.</p> <p>Responsibility for certain services and functions such as school improvement, audit and asset management that local authorities perform on behalf of maintained</p>	

Differences	Question	Notes	Indicative costs
		schools transfer to the Academy. Academies receive money for these services for the pupils who are their responsibility through the Education Services Grant.	
Surplus or deficits – On becoming an academy, schools may be able to carry forward any surplus. Circumstances when budgets can be carried forward are included in the ‘Scheme for Financing Schools’. Schools with deficits must have a repayment plan in place	What is our current financial situation?	If the school is in deficit, the repayment plan needs to be agreed by the Education Funding Agency (EFA) not the local authority.	
Academies must pay VAT	Will we need to employ qualified accountant to complete VAT returns?	Academies will receive additional funding to take account of needing to pay VAT. Governors should note that VAT needs to be paid on goods and services (not staff salaries) in their cost/benefit calculations.  Some elements of VAT are reclaimable.	
Governors need to arrange for annual audits of	Will we need to employ more/different staff?	Staff training possibly required. Academies need to ensure arrangements are made to	

Differences	Question	Notes	Indicative costs
accounts and submit accounts to Secretary of State and principal regulator by the deadline.		produce financial accounts and may choose to employ a qualified accountant to do this Academies will need to employ an auditor to audit the financial accounts	

### Legal

Differences	Question	Notes	Indicative costs
GB subject to Trust which will: 1) Register land 2) Appoint governors 3) Have a broad strategic oversight	How helpful will this be? On balance what do we gain?	Governors (also known as directors or trustees) will be appointed to the GB by the academy trust (made up of members)	
Academy Trust is a charitable trust subject to charity law	Have we considered the implications? What will we do differently? On balance do we gain?	Members of the converting school's GB will decide, in discussion with the Secretary of State, who will be a member of the academy trust and who will be a governor (it is possible to be both a member and a governor).  Academies are charitable trusts that are publicly funded independent schools. If the academy was to become bankrupt the members of the Trust body could be held liable to the amount set out in the Articles of Association. The most common level of liability is set out as £10 per trustee.	

## Premises

Differences	Question	Notes	Indicative costs
GB has total premises responsibility	<p>Have we considered the implications?</p> <p>Do we currently feel constrained?</p> <p>What will we do differently?</p> <p>How would our children benefit?</p> <p>On balance do we gain?</p> <p>What condition is our school building in?</p>	<p>VA and foundation schools already are responsible for their premises. This will only be different for community and VC schools.</p> <p>Refer to your LA's current schedule of centrally funded repairs and maintenance which would no longer be available to Academies.</p>	

## Behaviour & Attendance

Differences	Question	Notes	Indicative costs
<p>GB does not have to consult LA when considering an exclusion</p> <p>Attendance service free for maintained schools but academies must pay for services except for prosecutions and statutory work.</p>	Do we currently feel constrained?	<p>GB is not expected to seek the advice of a local authority officer when considering exclusion but parents can request LA Officer attendance and/or an SEN expert attendance.</p> <p>Academy will need to organise (or buy in) Independent Review Panel for Permanent Exclusions.</p> <p>Academies must comply with all other requirements in national guidance on exclusion.</p>	
		In addition to the individually assigned resources (IAR) for pupils requiring more support, academies will receive funding for SEN pupils. Academies must comply with 'SEN obligations imposed on governing	

Differences	Question	Notes	Indicative costs
		bodies of maintained schools'.	

### Admissions

Differences	Question	Notes	Indicative costs
Ability to determine own admission arrangements; however academies can be subject to direction from the SoS.	Do we currently feel constrained? What would we do differently? How would our children benefit? On balance what do we gain?	VA and Foundation schools already set their own admissions. This will only be different for community and VC schools. All schools must comply with the National Admissions Code of Practice and participate in Coordinated Admissions organised by the LA.  Academies are not allowed to introduce selection but may continue existing selection arrangements.  Academy will be responsible for independent Appeal Panel arrangements for school admissions.	
Ability to change length of terms and school days	Do we currently feel constrained? What would we do differently? How would our children benefit? On balance what do we gain?	Schools already have the power to change the length of the school day, providing they follow the appropriate Regulations. Some schools (specifically foundation and voluntary aided schools) have the ability to change the school term.  Need to consider implications for families and school transport.	

### Insurance

<b>Differences</b>	<b>Question</b>	<b>Notes</b>	<b>Indicative costs</b>
Academy Trust needs to purchase own indemnity insurance	What are the options?	<p>A governor as trustees/director has a limited liability £10. Governors need liability insurance because anyone acting as a trustee/director of an Academy Trust has unlimited liability for his/her own defaults.</p> <p>A trustee/director is not liable for any debts or liabilities providing s/he acts properly and within the powers and authority delegated to her/him. If s/he acts outside those parameters a trustee/director can be liable, without limit, for the loss caused to the Academy Trust. Liabilities to external parties would ordinarily be those of the academy trust (not the governors).</p> <p>Governors of academies need to have indemnity insurance, taken out by the trust, and are subject to charity law. Whereas GB's of maintained schools have their own legal identity and corporate responsibility and local authorities normally provide indemnity insurance.</p>	

### **Health & Safety**

<b>Differences</b>	<b>Question</b>	<b>Notes</b>	<b>Indicative costs</b>
GB has total responsibility for Health and	Have we considered the implications? What will we do	VA and foundation schools already are responsible for their premises, staff and	

<b>Differences</b>	<b>Question</b>	<b>Notes</b>	<b>Indicative costs</b>
<p>Safety</p> <p>No 'employer' role or responsibilities exist for the LA.</p> <p>Academy must obtain H&amp;S advice / support from a 'competent person'</p>	<p>differently?</p> <p>As we will have no health and safety support from the LA, will we need to spend more than we do currently on H&amp;S advice and support?</p> <p>On balance do we gain?</p>	<p>visitors. This will only be different for community and VC schools.</p> <p>Academies will need to purchase specialist advice from a 'competent health and safety person' and implement sufficient H&amp;S management systems. These systems will need to be regularly reviewed and audited to ensure compliance with all H&amp;S related legislation.</p>	

### Other Considerations

<b>Differences</b>	<b>Question</b>	<b>Notes</b>	<b>Indicative costs</b>
<p>Academies accountable to SoS</p>	<p>How do we feel about this?</p> <p>What would we do differently?</p> <p>How would our children benefit?</p> <p>On balance what do we gain?</p>	<p>SIPs employed by DfE will support and challenge academy. SIPs will not support Performance Management of the Headteacher.</p> <p>This is deemed to be the responsibility of the Academy governing body. Academy can purchase external adviser time to support governors in headteacher Performance Management</p>	
<p>Sustainability – of senior leadership team</p>	<p>Does our current headteacher and senior leadership team have the skills and attitudes to lead a successful academy?</p> <p>When the time comes, how likely are we to be able to appoint a headteacher with the</p>	<p>Academies are tied into a seven year funding agreement. The decision to become an academy cannot be reversed.</p>	



Differences	Question	Notes	Indicative costs
	<p>skills to continue academy development?  How can we ensure that the leadership is secure when key leaders are out of action?  Who will facilitate finding acting headteachers for us to consider?</p>		
Sustainability of governors and trustees	<p>Do governors have the capacity to be effective trustees as well as governors?  How likely is it that the level of skills and commitment can be maintained as governors and trustees retire?</p>	A Governance Handbook is available for trustees of academies, and multi academy trusts and governors of maintained schools.	
Changing role of clerk and administrative staff	<p>How keen are staff who would have to take on new responsibilities, for example secretary to the governing body and those dealing with finance?  Do they have the appropriate skills?  Will they require additional training and more time to complete additional tasks?</p>		

## Academy Conversion – The Application Process

When you have considered the differences and implications above, you are advised to consider the additional work and costs involved in making an application. The process is outlined below so that you can take this into account in your recommendation.

Note: Schools seeking academy status will receive a one-off grant of £25K. Governing bodies will need to consider whether the school and governing body have the capacity to complete the application and how might the one-off grant be spent to increase capacity? It will be essential to agree who or what group will be involved in each aspect of the application process.

In addition the Local Authority will also charge schools for work undertaken by LA Officers for the purpose of conversion.

Prior to application	By whom?	With whom?	Notes including estimated time required	Indicative costs
Consultation	Governing Body	Stakeholders – see above		
Report on responses leading to governing body decision	Governing Body	All governors		

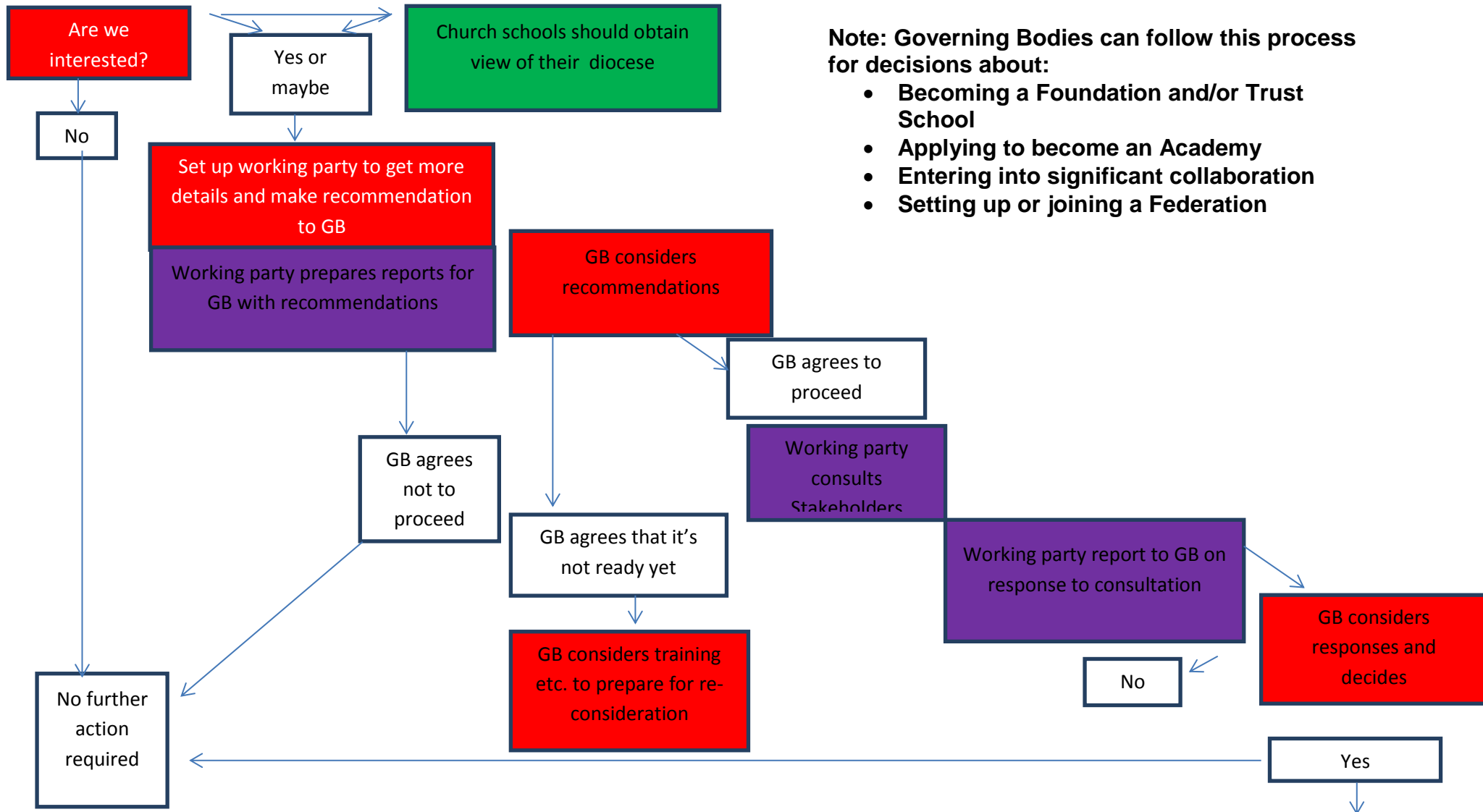
Application task	By whom?	With whom?	Notes including estimated time required	Indicative costs
Seek formal agreement from Trustees/Foundation and the body responsible for appointing foundation governors for example the diocese	Governing Body	Trustees/Foundation and the body responsible for appointing foundation governors	Only required if school if Foundation, Voluntary Aided or Voluntary Controlled	
Submit on-line application to convert (to academy) form	Governing Body	DfE	DfE will assign a Civil Servant to advise and assist the governing body through the	

<b>Application task</b>	<b>By whom?</b>	<b>With whom?</b>	<b>Notes including estimated time required</b>	<b>Indicative costs</b>
			conversion process	
Start TUPE (Transfer of Undertakings Protection of Employment) consultation and negotiation	Governing Body	Unions, LA and staff		
Seek Secretary of State approval and Academy Conversion Order.	Secretary of State	Governing Body		
Completion of registration form to register the Academy as an independent school	Governing Body	DfE		
Establish Academy Trust – Memorandum and Articles of Association	Governing Body		These documents will need to then be posted on the school's website	
Register the Academy Trust with the Charity Commission	Governing Body	Charity Commission		
Set up a bank account for the newly-formed Academy Trust	Governing Body	Bank		
Agree land and building leasing arrangements with the Foundation/Trust/LA	Governing Body	Foundation/Trust/LA		

<b>Application task</b>	<b>By whom?</b>	<b>With whom?</b>	<b>Notes including estimated time required</b>	<b>Indicative costs</b>
Agree asset and property transfer arrangements	Governing Body	Foundation/Trust/LA		
Ensure all required consultation has been undertaken	Governing Body	LA	All consideration and decisions must be recorded in the governing body minutes	
Complete TUPE process	Governing Body	Unions, staff and LA		
Sign Funding Agreement – legally binding for 7 years	Academy Trust	Secretary of State	Funding Agreement will state when the Academy will open and the date of conversion. This is the date when the LA will cease to maintain the converting school	

**Appendix A**

**THE DECISION-MAKING PROCESS**



**Note: Governing Bodies can follow this process for decisions about:**

- **Becoming a Foundation and/or Trust School**
- **Applying to become an Academy**
- **Entering into significant collaboration**
- **Setting up or joining a Federation**

**Appendix B**

**XXXXXXXXXXXXXXXXX School Consultation on the proposal to apply for Academy status**

As you will know, the government is encouraging schools such as ours to apply for academy status. The Governing Body set up a working party to consider the differences and implications.

It has recommended that we consult on a proposal to move to academy status. When we are considering significant changes, we always take into account the views of our stakeholders and this is what we are now doing.

The Governing Body has not made the decision on whether to apply for academy status. We are interested to hear and consider the views of stakeholders before we make a final decision.

The working party consider the following factors to be significant advantages which will lead to benefits for pupils at the school.

The main things that the school would do differently if it were to become an academy are:

(Include here any proposed changes in the arrangements for the curriculum, for special educational needs, for pupil discipline, exclusion and for complaints....)

There are a number of things which will remain unchanged. These are:  
(....and confirmation

that there will be no change in the admissions arrangements)	
The working party identified the following possible disadvantages:	
We believe that we can avoid or overcome them in the following ways:	
<p>The school could expect to receive additional funding because it will receive its share of the Education Services Grant currently held by the local authority to provide specified services.</p> <p>We have calculated the extra amount we would receive as £XXXXXX per year. This represents X% of the school budget.</p> <p>The services that were previously provided through the Education Services Grant and that we would need to purchase are shown below, together with the anticipated cost of purchasing.</p>	
<p><b>Services that the school would need to purchase</b></p> <p><b>Examples may include:</b></p>	<p><b>Anticipated cost per year</b></p>
Legal Services	
Insurance	
Licences	
Property Services	

There are additional costs associated with the following features of academies

See examples below	Anticipated cost per year
Academies are subject to charity law	
Academies are liable for VAT	

There are additional costs associated with increased freedoms and responsibilities.

Freedom	Responsibility	Estimated additional costs per year
Control of own premises	Pay for professional premises advice	
Direct employer of staff	Pay for all HR services and pay roll	
Control own admissions	Pay for all admissions appeals	

The working party considered whether the school has the capacity to complete all the processes which would be required if the Governing Body were to agree to make an application for academy status.

There will be a grant of £25K to help with this but the costs we have estimated are:

A few examples are shown below	Estimated cost
Land transfer	
Legal advice	
Administration of application process	
Cost of rebranding, signage etc.	
LA charges	
Total cost	
Net cost (subtract £25K grant)	

If the school were to become an academy it would support at least one other local school. Our current thoughts on this are:



The school recognises that it has a responsibility, shared with all other schools in its locality, for the young people and families in the area. We would seek to work with other schools and agencies in the following ways:	
The trustees who propose to enter into the academy arrangements will be:	
The Governing Body of the proposed academy will be made up of: Headteacher ex-officio....plus	

**The consultation process will run from.....date to.....date.**

**If you have any comments on these proposals please provide them in writing and send them to:**

**The Governing Body plans to consider the outcomes of this consultation at its meeting on.....date.**

**Signed.....  
Chair of Governors**

## Appendix C

## Unit Costs

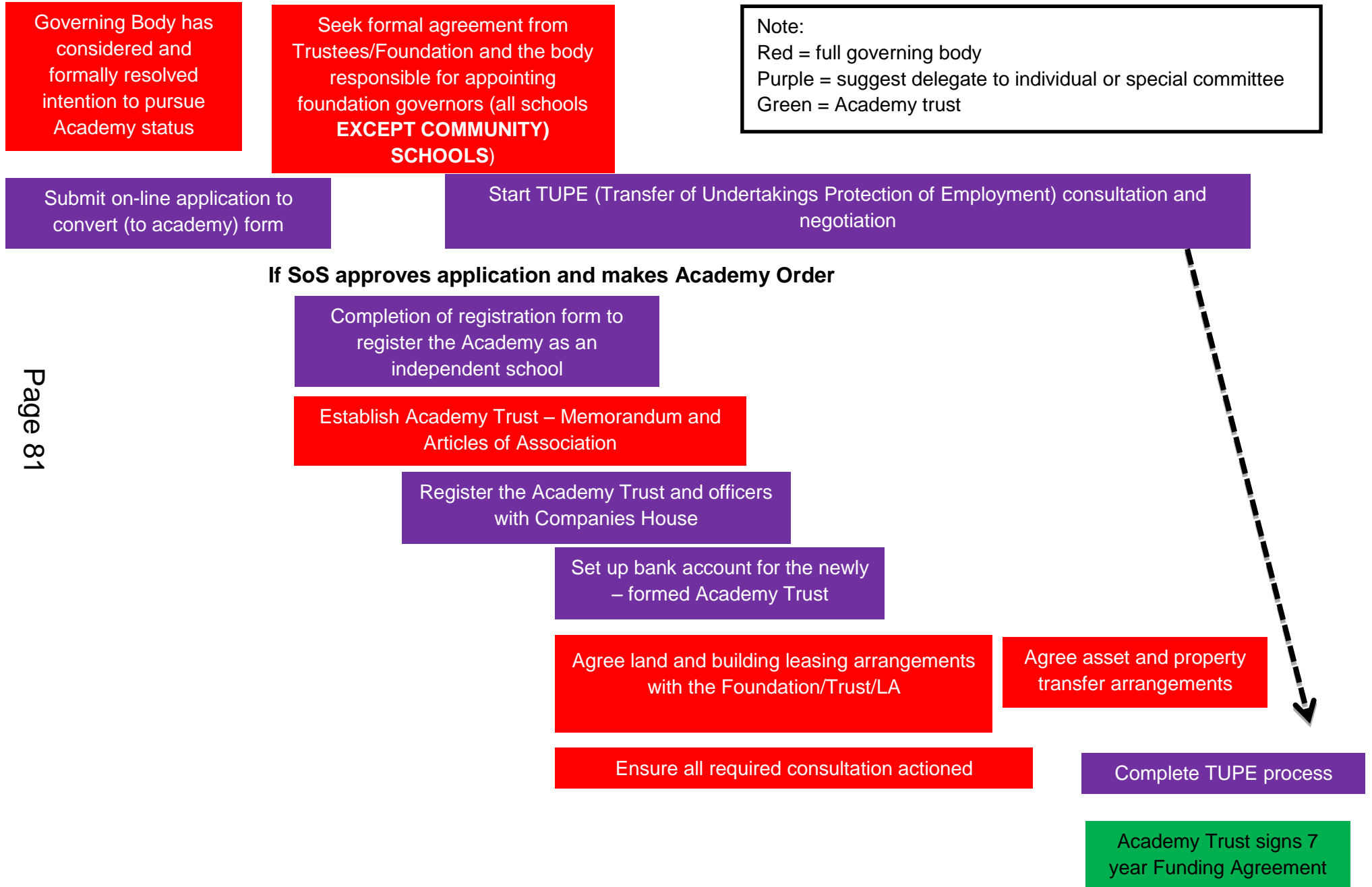
**Note:** The list below is an example of potential costs associated with academy conversion. Schools are strongly advised to contact specific service area leads to establish which costs may be incurred on conversion to academy status.

### EXAMPLE ONLY

Services and costs funded from the local authority's Schools Budget	Estimated cost of purchasing
<ul style="list-style-type: none"> <li>• Special educational needs (SEN) support services (see next section)</li> </ul>	
<ul style="list-style-type: none"> <li>• Behaviour support services</li> </ul>	
<ul style="list-style-type: none"> <li>• 14-16 practical learning options</li> </ul>	
<ul style="list-style-type: none"> <li>• Schools meals and milk</li> </ul>	
<ul style="list-style-type: none"> <li>• Assessment of free school meals eligibility</li> </ul>	
<ul style="list-style-type: none"> <li>• Repair and maintenance of kitchens</li> </ul>	
<ul style="list-style-type: none"> <li>• Museum and library services</li> </ul>	
<ul style="list-style-type: none"> <li>• Licences and subscriptions</li> </ul>	
<ul style="list-style-type: none"> <li>• Central staff costs (maternity, long term sickness and trade union duties)</li> </ul>	
<ul style="list-style-type: none"> <li>• Costs of certain employment terminations</li> </ul>	
Services and costs funded from other local authority sources	
<ul style="list-style-type: none"> <li>• Costs of a local authority's statutory/regulatory duties</li> </ul>	
<ul style="list-style-type: none"> <li>• Asset management costs</li> </ul>	
<ul style="list-style-type: none"> <li>• School improvement services</li> </ul>	
<ul style="list-style-type: none"> <li>• Monitoring national curriculum assessment</li> </ul>	
<ul style="list-style-type: none"> <li>• Education welfare service</li> </ul>	
<ul style="list-style-type: none"> <li>• Pupils support (e.g. clothing grants)</li> </ul>	
<ul style="list-style-type: none"> <li>• Music services</li> </ul>	
<ul style="list-style-type: none"> <li>• Visual and performing arts services</li> </ul>	
<ul style="list-style-type: none"> <li>• Outdoor education services</li> </ul>	
<ul style="list-style-type: none"> <li>• Certain redundancy and early retirement costs</li> </ul>	
<ul style="list-style-type: none"> <li>• Admissions appeals</li> </ul>	
<ul style="list-style-type: none"> <li>• Independent exclusion appeals</li> </ul>	
<ul style="list-style-type: none"> <li>• Accountants and Auditors</li> </ul>	

Appendix D

THE PROCESS FROM RESOLUTION TO CONVERSION



<b>POLICY ADOPTION AND REVISION DETAILS</b>			
<b>LEAD ADVISER</b>	Andy Collinge	<b>NEXT REVIEW DUE</b>	
<b>SIGNED OFF BY L.A. DATE</b>	May 2016	<b>L.A</b>	Summer 2016

# Oldham Local Authority Policy and Process on Free Schools (2016)

## Section One: Policy

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# Free Schools Policy

## 1. Introduction

- 1.1 The policy and associated guidance outlines the Local Authority's position with regard to free schools in Oldham
- 1.2 The Education Act 2011 changed the arrangements for establishing new schools and introduced section 6A (Free School Presumption) to the Education and Inspections Act 2006. Where the Local Authority identifies a need for a new school in its area it must seek proposals to establish a Free School. This policy and the Department of Education Guidance Documents provide a framework for determining Local Authority decisions with regard to Free Schools established through the Free School Presumption Process and for those who seek to establish Free Schools through direct applications to the Department of Education.
- 1.3 Free schools are independent of local authorities. This policy and guidance outlines the approach that will be taken by the Local Authority with regard to the establishment of free schools and offers practical advice and guidance on how the Local Authority will support and assist free schools and how proposers should approach free school applications.
- 1.4 The educational vision of the Local Authority includes the whole family of schools in Oldham regardless of whether they are free schools, academies or maintained schools. This vision envisages all schools, stakeholders and the Local Authority working together in partnership to provide the best possible outcomes for all children and young people.
- 1.5 Secondary Head Teachers and Primary Head Teachers continue to discuss matters and work together in their representative groups (OASHP) and OSA the Executive of Primary Heads Group regardless of their school status. The Local Authority's policy will be to continue to include all maintained, academy and free schools in its communications, consultations and discussions for the benefit of all Oldham children and young people.
- 1.6 The LA undertakes that it will promote its services and those of its strategic partners with free schools in order to ensure the highest level of buy back possible. The LA will seek to establish its services with the free school community in order to ensure the full benefits of collaborative working.
- 1.7 The LA is the employer for staff in Community Schools and Voluntary Controlled schools and the monitoring and maintaining authority for all non-academy schools. There is an expectation that all Oldham schools, regardless of governance arrangements and status will discuss proposals with the LA if they are considering initiating or supporting a free school bid for proposers outside of Oldham the Council expects that the key principles in this policy are followed.
- 1.8 The LA will base its support and endorsement of Free School applications on the proposers' ability to demonstrate their capability to fulfil the expectations of this policy and on no other criteria.

## 2. Definitions and Abbreviations

- 2.1 DfE means The Department of Education
- 2.2 NJC means National Joint Council
- 2.3 STPCD means the School Teachers Pay and Conditions Document
- 2.4 ICO means Information Commissioners Office
- 2.5 LA means Local Authority

## 3. Council Support & Guidance

- 3.1 Where there is local demand and demonstrable need for school places the LA will engage constructively with those proposing to set up free schools.
- 3.2 The LA will operate the following guiding principles with regard to free school applications:
  - OMBC will have as its central aim to facilitate a process through which parents can be consulted and engaged to have their say in achieving the best possible educational provision in their area.
  - Impartial advice and information will be provided on an equal basis to any group wishing to make a submission.
  - OMBC does not make the final decision on whether to accept a free school submission that decision is taken by the DfE. However the DfE usually consults with local authorities before making its decision. In responding to any consultation OMBC will provide impartial feedback reflecting the criteria set out below and the criteria listed in section 5 of this policy.
- 3.3 The LA will only consider support for free school proposals which: -
  - Enhance parental choice.
  - Provide sufficient time for meaningful consultation with the local community.
  - Help address the need for additional school places.
  - Adhere to the admissions and SEND codes.
  - Demonstrate an intention to work with the OESC (Oldham Education and Skills Commission), the LA and other local schools to ensure inclusive provision for all children including those at risk of exclusion.
  - Can evidence the capacity to provide provision which would be judged as good or outstanding by Ofsted.
  - Adhere to the requirements set out in section 5 of this policy.
- 3.4 For those proposals that are supported the LA will provide access to: -
  - Guidance on meaningful consultation.
  - Relevant impartial data.
  - Guidance on admissions and SEND arrangements.
  - Information held about available buildings or sites.



- Signposting to other relevant agencies and support.
- Provision of information about LA and other services that may be available to free schools.

**3.5** For the avoidance of doubt the LA will not undertake: -

- Project management.
- Bespoke research.
- Broker contracts.
- Provide inspections and or surveys of potential sites.
- Undertake conveyance work (unless a site is to be transferred or leased from the LA).
- Print, record or distribute publicity material.

## 4. Data and Records

- 4.1** The Free School is responsible for compliance with the Data Protection Act to ensure the accurate recording and safety of all pupil data and records.
- 4.2** The LA will expect all free schools to comply with the Education (Pupil Information, England) Regulation 2005 and any associated guidance produced by the ICO.
- 4.3** The LA will expect that free schools will share with them all data and records relevant to pupil wellbeing and performance.
- 4.4** A data sharing agreement will be drafted and agreed with each new free school to enable the sharing of pupil wellbeing and performance data.

## 5. Council's Preferred Provider

- 5.1** The LA will work closely with schools and the RSC (Regional Schools Commissioner) to ensure that free school sponsors and trusts share the LA's vision for high performing schools which are responsive to local needs and offer a valuable contribution to the borough education offer to parents.
- 5.2** Oldham Local Authority is an ambitious authority and good and outstanding schools are a key part of the authority's vision for a thriving forward looking and prosperous borough.
- 5.3** The Local Authority recognises that the educational landscape is changing at a fast pace and will work in partnership and co-operation with a range of autonomous providers of education and related services.
- 5.4** The Local Authority recognises the value of a wide range of provision and to that end the Local Authority is committed to working in partnership with a range of providers. As part of the educational offer to Oldham parents the Local Authority free school providers to demonstrate the following:-

The ability to:

- Secure effective leadership which will demonstrate an ambitious vision for the school and high expectations for what every pupil and teacher can achieve and set high standards for quality and performance including management of learning and teaching.
- Offer sharp challenge and the impetus to act where improvement is needed based on clearly identifying strengths and weaknesses.
- Promote rigour in school self –evaluation enhancing a school’s capacity to drive its own improvement
- Secure high standards in attainment and progress for all pupils
- Offer targeted professional development to secure good or better teaching throughout the school
- Develop a curriculum which meets children’s needs, engages them and prepares them for a variety of career paths.
- Gain the confidence of the community in the school and position the school in order that it plays a significant part in supporting families to meet high aspirations for the all pupils
- Build on existing partnerships with parents and carers and the community and ensure that all stakeholders are valued partners in the life of the school
- Ensure that residents and service users actively inform decision making and co-produce services with communities in line with co-operative values and principles
- Ensure the environs of the school are fit for learning and accessible to the wider community
- Work in partnership with the Local Authority to enable the LA to fulfil its statutory responsibilities with regard to safeguarding, LAC, SEND, school performance outcomes and school admissions. This includes an agreed process for sharing key information with the LA.

In addition, the Local Authority would expect sponsors to demonstrate:-

- A willingness to adhere to local terms and conditions of employment (including signing up to the Fair Employment Charter and the Living Wage Foundation)
- A proven track record of running a successful school.
- A willingness to engage local professional associations and a commitment to developing that engagement.

- That they understand and can pay heed to the values and aspirations of the local community and can contribute to the wider community served by the school.
- That they will engage in meaningful consultation with all stakeholders.
- That they will actively engage with the work of the OESC (Oldham Education and Skills Commission)

## 6. Land / Buildings

- 6.1** When free school proposers submit an application to establish a new school the EFA will work with them to secure suitable premises for the Free School.
- 6.2** Where a free school proposal is supported by the LA the LA will seek to assist in securing premises which may be suitable for use as a school.
- 6.3** The LA will seek to resist and make representations to appropriate authorities regarding the transfer of any land or buildings for use by Free School proposers who do not adhere to the criteria outlined section 5 of this policy.
- 6.4** The LA will not make any financial contributions to the refurbishment of sites or properties for use as Free Schools.

## 7. Financial Considerations

- 7.1** Where a free school is a Special School or Alternative Provision School the top up funding (i.e. the amount above the per-place rate of £10,000) will be funded from the Local Authority's DSG.
- 7.2** The current Oldham top up rate will range from £2,800 per place to £35,000 dependent upon the severity and complexity of the young person's special educational needs and may be subject to change in subsequent years
- 7.3** The place funding for Special Free schools is funded by the EFA and may vary over time as changes are made to schools and high- needs funding systems.
- 7.3** If the Special School is still growing after the place funding has been transferred to the DSG the Local Authority will fund the additional places from the existing Dedicated Schools Grant Resources.
- 7.4** The Local Authority will not fund any additional places beyond those for which it has a clear statutory responsibility.

## 8. Pensions

- 8.1** Where Free Schools are seeking Admitted Body status to the Greater Manchester Pension Fund for non- teaching staff backed by a Council indemnity or guarantee, the Council adopts a default position of operating non-pooled arrangements on closed scheme basis. However, if for statutory, policy, service or value for money reasons, it is appropriate to seek terms that are different to the default position then the rationale for agreeing alternative terms should be disclosed as part of the business case for entering into the arrangement.
- 8.2** Decisions to approve specific pension funds transfer and/or pooling arrangements will be made by the Cabinet Member for Finance and HR and the Cabinet Member for Education in consultation with the Director of Finance and the Director of Education and Early Years.

## 9. Leases

- 9.1** As part of the free school the LA may transfer land and buildings on a 125 year lease. The terms of such leases will be as required by the DfE and the following will be key features of all leases to free schools;
- The property can only be used for educational purposes set out in the Academy Trusts 'Article of Association'.
  - The lease cannot be assigned to another body without the permission of the Secretary of State.
  - The lease will allow the Local Authority to forfeit the lease and re-enter the Property if the Free School Trust fails:-
    - To use the property for purpose originally agreed
    - Becomes dissolved, struck off or removed from the Register of Companies or otherwise ceases to exist.
  - The lease will automatically end if the free school funding agreement is terminated and there is no replacement funding agreement for educational purposes.
  - In the event of the lease being forfeited or ending due to some other reason the site would revert back to the Council as the freehold owner
- 9.2** Where the LA considers that a school has land surplus to its needs the LA will seek to retain any surplus land this land forms part of a strategic need related to the delivery of educational or children's services.

- 9.3** The LA will, as part of any lease negotiations seek to ensure that the interests of third parties such as community groups or before and after school clubs who will have access and use of buildings should this be applicable.
- 9.4** The LA reserves the right to include or exclude land beyond the schools physical boundary.

## 10. Sources of Information and Support

- 10.1** Department of Education website - [www.education.gov.uk](http://www.education.gov.uk)
- 10.2** Finance (Liz Caygill - [liz.caygill@oldham.gov.uk](mailto:liz.caygill@oldham.gov.uk))
- 10.3** HR & General Information (Andy Collinge – [andy.collinge@oldham.gov.uk](mailto:andy.collinge@oldham.gov.uk))
- 10.4** Legal (Doug Chisholm – [doug.chisholm@oldham.gov.uk](mailto:doug.chisholm@oldham.gov.uk))
- 10.5** Pensions (John Hoskins – [john.hoskins@oldham.gov.uk](mailto:john.hoskins@oldham.gov.uk))
- 10.6** Pupil Records (Tim Hanstock – [tim.hanstock@oldham.gov.uk](mailto:tim.hanstock@oldham.gov.uk))
- 10.7** Pupil Place Planning (Andy Wood – [andrew.wood@oldham.gov.uk](mailto:andrew.wood@oldham.gov.uk))
- 10.9** SEND (Dr Shirley Woods-Gallagher – [S.Woods-Gallagher@oldham.gov.uk](mailto:S.Woods-Gallagher@oldham.gov.uk))
- 10.10** Estates (Andrew Hall – [andrew.hall@oldham.gov.uk](mailto:andrew.hall@oldham.gov.uk))
- 10.11** The New Schools Network – [www.newschoolsnetwork.org](http://www.newschoolsnetwork.org)

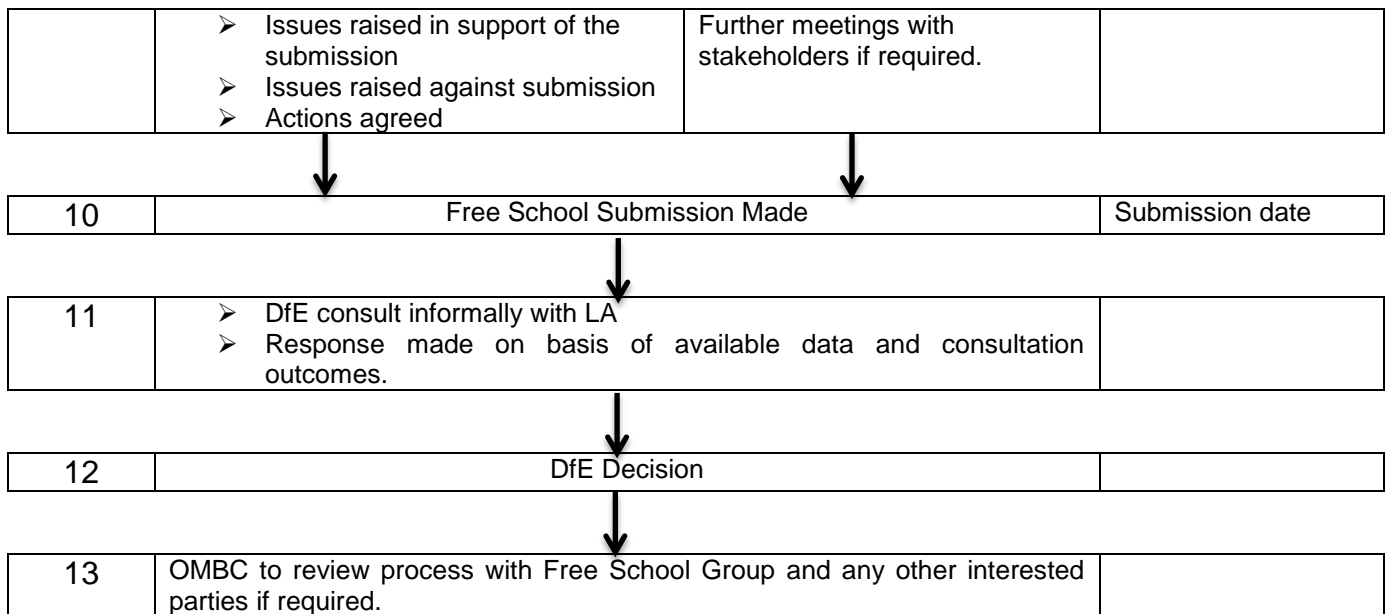
## 11. Interpreting the Policy

In the event of a dispute regarding the interpretation of this policy, advice must be sought from the LA Legal Department. The LA may seek further advice before issuing any guidance.

Any advice regarding interpretation will automatically become incorporated into this policy.

## Section Two: Free School Application Flowchart

	<b>ACTION</b>	<b>TIMESCALE</b>
1	The free school proposer to contact DfE and the New Schools Network.	6 months prior to submission
2	The free school group to inform OMBC that they are considering a free school submission and request a meeting with the cabinet member for Education and senior LA officers.	
3	<ul style="list-style-type: none"> <li>• Business Support will confirm receipt of notification by email</li> <li>• Proposed date for the meeting to be sent by Business Support within 10 days.</li> </ul>	
4	Meeting with cabinet member and senior officers to: - <ul style="list-style-type: none"> <li>➤ Clarify the vision for the free school and potential business case</li> <li>➤ Clarify the intended timescale for submission</li> <li>➤ Clarify what information is needed from               <ul style="list-style-type: none"> <li>○ School Support Services</li> <li>○ Schools Admissions Team</li> <li>○ Estates and valuation</li> <li>○ SEND</li> </ul> </li> <li>➤ Agree a named contact at OMBC to assist with information gathering.</li> <li>➤ Obtain information regarding other agencies who may be able to assist.</li> <li>➤ Plan consultation and agree how OMBC can help broker contacts with other local providers.</li> </ul>	5 months before submission
5	Cabinet member to make a decision as to whether the LA will support the proposal. This decision will be communicated proposer within 10 working days.	
6	Business Support will collate information requested within 16 days and forward to Free School proposer within 3 weeks.	
7	OMBC offers guidance regarding community consultation.	
8	Meeting to finalise arrangements for community consultation.	
9	Community consultation carried out and report written to indicate: <ul style="list-style-type: none"> <li>➤ Info regarding interested parties</li> <li>➤ Numbers of participants for local community</li> </ul>	3 months before submission



<b>POLICY ADOPTION AND REVISION DETAILS</b>			
<b>LEAD ADVISER</b>	Andy Collinge	<b>NEXT REVIEW DUE</b>	
<b>SIGNED OFF BY L.A. DATE</b>	December 2016	<b>L.A</b>	Summer 2017

# Appendix C

## Historical Data

Primary Need	2015			2016			2017			2018			2019		
	No of EHCPs	No of SS Places	SS %	No of EHCPs	No of SS Places	SS %	No of EHCPs	No of SS Places	SS %	No of EHCPs	No of SS Places	SS %	No of EHCPs	No of SS Places	SS %
ASD	201	71	35.3%	235	129	54.9%	287	151	52.6%	341	173	50.7%	384	179	46.6%
HI	24	1	4.2%	22	1	4.5%	22	1	4.5%	24	1	4.2%	29	1	3.4%
MLD	49	0	0.0%	49	1	2.0%	49	2	4.1%	59	1	1.7%	67	3	4.5%
MSI	1	0	0.0%	3	0	0.0%	2	0	0.0%	2	0	0.0%	3	0	0.0%
OTH	8	0	0.0%	9	0	0.0%	11	0	0.0%	13	0	0.0%	15	0	0.0%
PD	46	8	17.4%	43	9	20.9%	44	10	22.7%	38	12	31.6%	45	13	28.9%
PMLD	40	35	87.5%	39	32	82.1%	35	35	100.0%	44	32	72.7%	41	36	87.8%
SEMH	58	29	50.0%	47	33	70.2%	68	32	47.1%	77	34	44.2%	93	34	36.6%
SLCN	83	11	13.3%	83	10	12.0%	91	10	11.0%	107	13	12.1%	128	17	13.3%
SLD	33	19	57.6%	33	26	78.8%	39	31	79.5%	34	32	94.1%	40	31	77.5%
SPLD	18	0	0.0%	22	0	0.0%	29	0	0.0%	38	0	0.0%	44	1	2.3%
VI	13	2	15.4%	13	2	15.4%	10	3	30.0%	16	3	18.8%	13	3	23.1%



## Projections Data

Primary Need	2020		2021		2022		2023		2024	
	EHCPs	SS Places	EHCPs	SS Places	EHCPs	SS Places	EHCPs	SS Places	EHCPs	SS Places
ASD	451.6	231.3	531.2	272.1	624.8	320.0	734.9	376.4	864.3	442.7
HI	30.6	1.3	32.2	1.3	34.0	1.4	35.8	1.5	37.7	1.6
MLD	72.7	2.2	78.9	2.4	85.6	2.6	92.8	2.9	100.7	3.1
MSI	4.6	0.0	7.1	0.0	11.0	0.0	16.9	0.0	26.1	0.0
Page 95	17.6	0.0	20.6	0.0	24.1	0.0	28.2	0.0	33.0	0.0
P5	45.1	11.7	45.1	11.7	45.2	11.8	45.3	11.8	45.3	11.8
PMLD	41.6	35.7	42.3	36.2	42.9	36.8	43.6	37.3	44.2	37.9
SEMH	106.9	52.9	122.8	60.8	141.2	69.9	162.3	80.3	186.5	92.3
SLCN	143.0	17.3	159.7	19.4	178.4	21.6	199.3	24.2	222.7	27.0
SLD	42.3	34.9	44.7	36.9	47.3	39.0	50.0	41.3	52.9	43.6
SPLD	55.1	0.3	69.0	0.4	86.4	0.5	108.2	0.6	135.4	0.8
VI	13.6	3.0	14.2	3.1	14.9	3.2	15.5	3.4	16.2	3.5

### Cognition and Learning (C&L)

PMLD	SLD	MLD	SpLD
Profound and multiple learning difficulties	Severe Learning Difficulties	Moderate Learning Difficulties	Specific Learning Difficulties
Functioning between P1 and P3. Cognition and language development at 18 month level or below. Require high level of support in all areas.	Functioning between P2 and P5 at primary age and up to P7/8 at high school.	Functioning within the P3 to Level 1c range primary age and P4- Level 2 range at high school.	e.g. dyslexia (words), dyscalculia (numbers), dyspraxia (physical coordination)

### Communication & Interaction (C&I)

SLCN	ASD
Speech, language and communication needs	Autistic spectrum disorder
Delayed or disordered speech and language. Difficulties with receptive and expressive language and/ or social communication and interactions with others.	Medical diagnosis of ASD (including Asperger's Syndrome and Autism). Difficulties with social interaction and/ or with language, communication and imagination.

### Physical and Sensory (P&S)

HI	VI	MSI	PD
Hearing impairment	Visual impairment	Multi-sensory impairment	Physical disability
A severe to profound impairment in hearing. Require adaptations to the learning environment.	A severe to profound impairment in vision. Require adaptations to the learning environment.	Deaf blind children and young people. Require significant adaptations to the learning environment.	Significant physical disability. Require adaptations to the learning environment.

### Social, Emotional and Mental Health (SEMH)

A wide range of social and emotional difficulties. May include becoming withdrawn or isolated, challenging, disruptive or disturbing behaviour. May reflect underlying mental health difficulties such as anxiety or depression, self-harming, substance misuse, eating disorders or physical symptoms. May include attention deficit disorder, attention deficit hyperactive disorder or attachment disorder.

# Appendix D

## Admissions and Appeals Performance

### Primary:

Primary allocation preferences	2017	2018	2019
Oldham 1st preference	91%	92%	93%
National 1st preference	90%	91%	91%
Oldham 1-3 preference	97%	97%	98%
National 1-3 preference	97%	98%	98%

- Oldham remains above the national average for parents receiving their first choice of primary school. This is due to the wide range of good / outstanding schools and the expansions work done by the LA in recent years.

### Secondary:

Secondary allocation preferences	2017	2018	2019
Oldham 1st preference	75%	73%	75%
National 1st preference	84%	82%	81%
Oldham 1-3 preference	90%	88%	89%
National 1-3 preference	95%	94%	93%

- Oldham remains below the national figures for both 1<sup>st</sup> and top 3 preferences being offered.

The below table shows the difficulty faced in Oldham.

- The most popular schools are very popular and attract a lot of the LA's 1<sup>st</sup> and top 3 preferences.
- Blue Coat for example were a 1<sup>st</sup> preference for 618 applications but have a PAN of 245. 8 out of the 13 Secondary Schools in Oldham received more 1<sup>st</sup> preference applications than they had places available.

School Name	% of PAN compared to number of 1 <sup>st</sup> preferences
Blue Coat C.E. Secondary School	252%
Crompton House Church of England School	123%
Co-op Academy Failsworth	102%
North Chadderton School and Sixth Form Centre	128%
Oasis Academy Oldham	70%
Oasis Academy Leesbrook	20%
Royton & Crompton Secondary School	52%
Saddleworth Secondary School	115%
The Blessed John Henry Newman RC College	175%
The Hathershaw College Academy Trust	107%
The Oldham Academy North (EACT)	60%
The Radclyffe Secondary School	134%
Waterhead Academy	63%

## Appeal Figures (September 2004 – Present)

Academic Year	Admission Appeals	Exclusion Appeals/Reviews
2004/05	69	2
2005/06	140	1
2006/07	212	1
2007/08	362	10
2008/09	439	5
2009/10	424	3
2010/11	361	3
2011/12	476	5
2012/13	473	2
2013/14	642	2
2014/15	763	2
2015/16	670	1
2016/17	926	2
2017/18 (23.03.18)	267	2

**No. admissions upheld to 23.03.18 – 63 (2017/18)**

**No. exclusion reviews upheld to 27.11.17 – 1 (2017/18)**

**No. admissions upheld to 14.07.17 – 187 (2016/17)**

**No. exclusion reviews upheld to 07.06.17 – 0 (2016/17)**

**No. admissions upheld to 08.07.16 – 180 (2015/16)**

**No. exclusion reviews upheld to 07.01.16 – 0 (2015/16)**

**No. admissions upheld to 16.07.15 – 218 (2014/15)**

**No. exclusion reviews upheld to 05.06.15 – 0 (2014/15)**

**No. admissions upheld to 17.07.14 – 129 (2013/14)**

**No. exclusion reviews upheld to 13.01.14 – 0 (2013/14)**

**No. admissions upheld to 17.07.13 – 114 (2012/13)**

**No. exclusion reviews upheld to 15.05.13 – 0 (2012/13)**

**No. admissions upheld to 17.07.12 – 99 (2011/12)**

**No. exclusion appeals upheld to 20.07.12 – 0 (2011/12)**

**No. admissions upheld to 20.07.11 – 82 (2010/11)**

**No. exclusion appeals upheld to 22.07.11 – 2 (2010/11)**

# Appendix E

## SCAP Data and Commentary

### Schools Capacity Survey 2019

#### Local Authority Commentary

<b>Local Authority Name</b>	Oldham LA
<b>Local Authority Number</b>	353
<b>Contact Names</b>	Andy Wood
<b>Tel.</b>	0161 770 3722

You are asked to provide a commentary to assist the Department in its analysis of current and projected pupil place pressures and available capacity. PLEASE SUBMIT YOUR COMMENTARY ON THIS TEMPLATE ONLY. It provides an opportunity to qualify the impression that might be obtained from capacity data, pupil forecasts and capital spend data.

The commentary should provide a brief explanation where school capacity is an issue. This may be where there is a surplus or a shortfall of capacity. Where schools/planning areas currently have or are projected to have a shortfall of places, please record the steps being taken to address these. Please use the commentary to explain where there is planned action to secure additional capacity, for at least the next two academic years.

You should also use the commentary to provide an explanation of any other significant changes to capacity and the effect this would have on school places available. Where issues and/or solutions cross planning area boundaries, please indicate this in the relevant section below.

The commentary is distinguishable from the separate Methodology Statement in which you will indicate how these issues have been factored into your pupil forecasts. You should refer to the separate guidance for detail of requirements.

#### **1. General LA overview indicating LA wide trends (including both primary and secondary age)**

The general population in the borough has increased in the last five years. For schools it means the number of children needing a school place at the start of the academic year is also increasing. In year transfers have also increased since 2013. This is largely due to additional housing and the number of children and young people moving into the borough from abroad. In the main the above families are moving into council owned and private rented housing in two of the six planning areas; East Oldham and West Oldham.

Total primary aged mainstream pupils at January Census 2018 was 24257. This figure had risen to 24340 in January 2019 Census, an increase of 0.3% in 12 months. There are currently 476 empty places in the primary sector. The majority of these places are in KS1 due to a primary expansion programme over recent years. There are minimal places in year 3- year 6 throughout the borough.

Total secondary aged mainstream pupils Yr 7 – Yr11 at January Census 2018 was 15,388. This figure had risen to 15,735 in January 2019 Census. An increase of 2.3% over the 12-month period. There are currently 154 empty places.

3239 pupils have been offered Oldham schools for Reception 2019. There are currently 272

reception vacancies for September 2019. These vacancies are across all of the six planning areas. The surplus places are as a result of a significant programme of primary school expansion over the last 5 years.

3548 pupils have been offered Oldham schools for Secondary Allocation 2019. There are currently 40 spaces with schools being willing to voluntarily go over PAN. We have also secured 20 extra places at Blue Coat School. Blue Coat have current bulge classes in year 8 and year 9. Oldham was affected by the sudden closure of Collective Spirit which has seen schools in Oldham take the pupils at short notice. Those Collective Spirit pupils are still within the current secondary cohort.

**2. Factors affecting overall LA pupil numbers e.g. migration, housing development, live births. If you experience cross local authority boundary movement, please identify the other local authorities involved and the scale of places affected.**

**Cross border movement;**

Oldham LA is a net importer of pupils and this trend continues. Secondary allocation offer day 2019; 115 Oldham residents were offered out of borough schools and 286 out of borough pupils were offered Oldham schools - +171. Primary allocation offer day 2019; 48 Oldham residents were offered out of borough schools and 111 out of borough pupils were offered Oldham schools - +63.

**Fair Access and In year Transfers:**

<b>Primary;</b>	<b>Number of FA allocations;</b>	<b>Secondary;</b>	<b>Number of FA allocations;</b>
2016/17	609	2016/17	257
2017/18	563	2017/18	356
2018/19	499	2018/19	234

The largest volumes of Fair Access pupils include primary aged new arrivals with no command of the English language and those that have been out of education for more than two months in the secondary sector.

Below shows primary and secondary transfers processed from 2016/17 (where the pupil has gone on to the roll of an Oldham school mid-year). These are additional to the Fair Access Admissions above.

<b>Primary;</b>	<b>Number of transfers;</b>	<b>Secondary;</b>	<b>Number of transfers;</b>
2016/17	1452	2016/17	714
2017/18	1442	2017/18	626
2018/19	1326	2018/19	505

## Housing Development

The council's Housing Strategy

([https://www.oldham.gov.uk/downloads/file/5561/housing\\_strategy\\_2019](https://www.oldham.gov.uk/downloads/file/5561/housing_strategy_2019)) and underpinning delivery plan sets out how we will seek to deliver an Oldham Housing Offer that is attractive and meets the needs of different sections of the population at different stages of their lives.

Oldham's local housing need, based on the central government's standard methodology is 692 dwellings a year. This is a significant increase on the housing requirement set out in the current Local Plan (adopted November 2011) which requires delivery of at least 289 new homes a year.

Furthermore, the 2019 draft Greater Manchester Strategic Framework: GM Plan for Homes, Jobs and the Environment proposes a target of around 201,000 additional homes (net) to be delivered over the period 2018-2037 to accommodate its growing population. It is proposed to phase the provision of these new homes: in Oldham it proposes the provision of 450 new homes per year between 2018-2023, increasing up to 860 new homes per year between 2024 and 2037. This equates to 752 a year over the plan period (2018-2037).

In addition to the baseline housing land supply position, details of which have been used to inform this submission, the 2019 draft GMSF proposed a number of strategic allocations across the borough with the potential to deliver around 4,000 new homes over the plan period (2018 to 2037). Given their scale it will be important to ensure that these sites are developed in a comprehensive manner that delivers a mix of housing to meet our local housing needs, high quality places and neighbourhoods and the supporting infrastructure required, thereby contributing to mixed and balanced sustainable communities.

The GMSF proposal has not been included into our forecasts, the forecasts are based on the natural development of the population. This is because we have no confirmed plans or dates for the delivery of the proposal.

### **3. Summary of primary places in individual planning areas: include information about planning areas that are experiencing pressure on places (either current or projected) and where action is required to address this, or where PAs are experiencing sustained surpluses in capacity and where action is required to address this.**

You should include the local factors affecting each area identified and the impact of those factors, relating them, where appropriate, to the Local Authority wide factors described in section 2 above in addition to area specific issues.

Schools experiencing particular shortfall of places, current or projected, should be identified here. Where possible, please identify schools by their establishment number as well as name to help us match this up to your data submission.

If you plan at Local Authority level only and do not use planning areas, you should complete this section to illustrate regional variations where these create pressures on places that require actions to address impacts. Where there are no regional variations, you should provide all the information in section 3a only. Where issues and/or solutions cross planning area boundaries, please indicate this in the relevant section.

Please copy and paste additional rows as needed.

<b>Total number of planning areas across the Local Authority.</b>	
---	--

<b>Planning area name / ID</b>	
<b>a.</b>	<b>Overview</b>
<b>NAME: Chadderton</b>  <b>ID: 0001</b>	40 spaces out of 278 in the Primary Allocation 2019 are in this planning area with 6 schools with spaces.
	30+ spaces current Reception and year 2. Pressure on places in year 1 and KS2. No spaces in current year 1, year 3 and year 5.
	<b>Actions (current and planned) to address shortage/excess of places. Include the number of places to be added or removed in each school and by what date.</b>
	Looking at further expansion. Bid submitted for a free school that was unsuccessful. A shortfall in places is expected in this planning area and the LA are already investigating suitable schools to expand.
	<b>Please indicate relationship with issues and solutions in other planning areas (including identification of the planning area)</b>
	Bordering West Oldham, Failsworth & Hollinwood and Royton & Shaw. Close proximity means cross planning area preferences are common.
<b>b.</b>	<b>Overview</b>
<b>NAME: East Oldham</b>  <b>ID: 0002</b>	29 out of 278 spaces in the Primary Allocation 2019 are in this planning area with 4 schools with spaces.
	Spaces in all year groups but year 5.
	<b>Actions (current and planned) to address shortage/excess of places. Include the number of places to be added or removed in each school and by what date.</b>
	Clarksfield and Mayfield will be adding an additional 60 places for allocation 2020. Additional pressure to be supported by neighbouring planning areas.
	<b>Please indicate relationship with issues and solutions in other planning areas (including identification of the planning area)</b>
	West Oldham, East Oldham and parts of Saddleworth & Lees all support each other in terms of cross planning area placements.
<b>c.</b>	<b>Overview</b>
<b>NAME: Failsworth and Hollinwood</b>  <b>ID: 0003</b>	33 out of 278 spaces in the Primary Allocation 2019 are in this planning area with 8 schools with spaces.
	10 or more spaces in all year groups bar Year 5 which has 4 vacant spaces.
	<b>Actions (current and planned) to address shortage/excess of places. Include the number of places to be added or removed in each school and by what date.</b>
	There is no action needed.
	<b>Please indicate relationship with issues and solutions in other planning areas (including identification of the planning area)</b>
	There is no action needed.



<b>d.</b>  <b>NAME:</b> <b>Saddleworth and Lees</b>   <b>ID: 0004</b>	<b>Overview</b>
	66 out of 278 spaces in the Primary Allocation 2019 are in this planning area with 9 schools with spaces.  Spaces through year groups, pressure in year 3 and year 5.
	<b>Actions (current and planned) to address shortage/excess of places. Include the number of places to be added or removed in each school and by what date.</b>
	Greenfield School have had a 1FE expansion which has been included in the Primary 2019 allocation.
	<b>Please indicate relationship with issues and solutions in other planning areas (including identification of the planning area)</b> West Oldham, East Oldham and parts of Saddleworth & Lees all support each other in terms of cross planning area placements.
<b>e.</b>  <b>NAME:</b> <b>Royton and Shaw</b>   <b>ID: 0005</b>	<b>Overview</b>
	54 out of 278 spaces in the Primary Allocation 2019 are in this planning area with 7 schools with spaces.  Currently spaces throughout year groups. Some pressures in KS2.
	<b>Actions (current and planned) to address shortage/excess of places. Include the number of places to be added or removed in each school and by what date.</b>
	There is no action needed.
	<b>Please indicate relationship with issues and solutions in other planning areas (including identification of the planning area)</b> There is no action needed.
<b>f.</b>  <b>NAME: West Oldham</b>   <b>ID: 0006</b>	<b>Overview</b>
	56 out of 278 spaces in the Primary Allocation 2019 are in this planning area with 9 schools with spaces.  Currently spaces in all year groups, some pressure in KS2.
	<b>Actions (current and planned) to address shortage/excess of places. Include the number of places to be added or removed in each school and by what date.</b>
	<b>Please indicate relationship with issues and solutions in other planning areas (including identification of the planning area)</b> West Oldham, East Oldham and parts of Saddleworth & Lees all support each other in terms of cross planning area placements.

**4. Summary of secondary places in individual planning areas: include information about planning areas that are experiencing pressure on places (either current or projected) and where action is required to address this, or where PAs are experiencing sustained surpluses in capacity and where action is required to address this.**

You should include the local factors affecting each area identified and the impact of those factors, relating them, where appropriate, to the Local Authority wide factors described in section 2 above in addition to area specific issues.

Schools experiencing particular shortfall of places, current or projected, should be identified here. Where possible, please identify schools by their establishment number as well as name to help us match this up to your data submission.

If you plan at Local Authority level only and do not use planning areas, you should complete this section to illustrate regional variations where these create pressures on places that require actions to address impacts. Where there are no regional variations, you should provide all the information in section 4a only. Where issues and/or solutions cross planning area boundaries, please indicate this in the relevant section.

Please copy and paste additional rows as needed.

<b>Total number of secondary planning areas across the Local Authority.</b>		
<b>Planning area name / ID</b>		
<b>a.</b>	<b>Overview</b>	
<b>NAME: Secondary</b>	For September 2019 allocation we have 5 schools with spaces totalling 41 spaces.	
	Blue Coat School have taken an extra 20 spaces as a bulge class.	
	All pupils that have requested a year 7 place have been allocated / offered a place.	
<b>ID: 0007</b>	<b>Actions (current and planned) to address shortage/excess of places. Include the number of places to be added or removed in each school and by what date.</b>	
	Oasis Leesbrook to move to a new site and move to 300 PAN in September 2020. Oasis Leesbrook are currently only able to operate at 150 PAN due to their current temporary building, the former GMUTC site.	
	Expansion work at Crompton House, PAN increase from 224 to 336 completed and included in the 2019 allocation.	
	Expansion work at The Oldham Academy North, 2FE, completed and included in the 2019 allocation.	
	This is the total additional places of 171 for September 2019 from 2018.	
	Agreement on a 8FE Secondary Free School announced run by the Cramner Trust. Aiming to be complete September 2022, the announcement was made June 2019.	
	Saddleworth School's new build still not started but will add an additional 20 places.	

	North Chadderton have expanded to 270 for allocation since September 2017.
	<b>Please indicate relationship with issues and solutions in other planning areas (including identification of the planning area)</b>
	N/A as only one secondary planning area.

<b>5. Any further information</b>
<p>Both Secondary and Primary Fair Access Protocols in Oldham allow the LA to place pupils over number in schools should a place not be available to offer. In Secondary that means all schools are full in the year group. In primary that means no places within the prescribed walking distances, 2 miles under 8 years old, 3 miles from 8 onwards. Capacity within the primary sector will move through from the KS1 as the expansion work previously undertaken moves through the year groups.</p>

## SCAP 2019 – LA Pupil Forecasting – Oldham & Districts – 10 Years from 2019/20

**PROVISIONAL 4<sup>th</sup> Draft**

### SCAP 2019 – OLDHAM (ALL)

Oldham LA Pupil Forecasting - 10 year forecast from 2019-20																							
Oldham																							
Age 31st August	Residence-based totals					School-location-based totals													Total	Total	Total	Change	
	0 (Births)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	Primary	Secondary		Pri/Sec
School Year Group					N2	R	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13				
2004-05	3,203	0	0	0	0	2,927	2,992	2,979	3,057	2,967	2,946	2,969	3,100	3,195	3,245	3,221	3,160	445	380	20,837	16,746	37,583	
2005-06	3,293	0	0	0	0	2,939	2,928	2,993	2,965	3,057	2,945	2,927	3,002	3,088	3,196	3,231	3,174	464	392	20,754	16,547	37,301	-282
2006-07	3,361	0	0	0	0	2,965	2,942	2,917	2,981	2,945	3,043	2,953	2,982	2,996	3,058	3,195	3,215	457	404	20,746	16,307	37,053	-248
2007-08	3,201	0	0	0	0	2,994	2,980	2,932	2,907	2,982	2,940	3,024	3,035	2,981	2,998	3,035	3,179	518	390	20,759	16,136	36,895	-158
2008-09	3,344	0	0	0	0	3,080	3,027	2,954	2,931	2,910	2,948	2,927	3,106	3,026	2,971	2,993	3,009	542	479	20,777	16,126	36,903	8
2009-10	3,339	0	0	0	0	3,124	3,093	3,019	2,931	2,927	2,903	2,937	2,969	3,100	3,018	2,955	2,987	530	485	20,934	16,044	36,978	75
2010-11	3,328	0	0	0	0	3,211	3,172	3,108	3,033	2,958	2,929	2,915	2,901	2,978	3,099	3,005	2,946	451	477	21,326	15,857	37,183	205
2011-12	3,274	0	0	0	0	3,229	3,223	3,204	3,101	3,052	2,953	2,949	2,858	2,896	2,956	3,088	3,003	467	434	21,711	15,702	37,413	230
2012-13	3,334	0	0	0	3,159	3,324	3,246	3,230	3,213	3,085	3,053	2,971	2,905	2,836	2,907	2,949	3,085	458	470	22,122	15,610	37,732	319
2013-14	3,311	0	0	0	3,152	3,376	3,373	3,276	3,276	3,228	3,111	3,065	2,892	2,900	2,868	2,932	2,948	451	454	22,705	15,445	38,150	418
2014-15	3,280	0	0	0	3,185	3,386	3,431	3,409	3,279	3,298	3,244	3,133	2,960	2,918	2,920	2,890	2,905	456	462	23,180	15,511	38,691	541
2015-16	3,413	0	0	0	3,095	3,469	3,503	3,501	3,473	3,357	3,385	3,305	3,123	3,004	2,990	2,966	2,918	461	406	23,993	15,868	39,861	1,170
2016-17	3,310	0	0	0	3,270	3,352	3,538	3,538	3,560	3,542	3,428	3,401	3,245	3,179	3,090	3,064	3,008	516	442	24,359	16,544	40,903	1,042
2017-18	3,314	0	0	0	3,172	3,451	3,444	3,580	3,574	3,578	3,520	3,437	3,319	3,228	3,160	3,068	3,028	418	379	24,584	16,600	41,184	281
Actual 2018-19	3,307	0	0	0	3,260	3,361	3,538	3,429	3,593	3,585	3,600	3,537	3,377	3,319	3,247	3,121	3,027	518	471	24,643	17,080	41,723	539
Forecast 2019-20	3,325	0	0	0	3,382	3,347	3,462	3,581	3,481	3,645	3,632	3,638	3,596	3,408	3,367	3,268	3,124	501	508	24,786	17,773	42,559	836
Forecast 2020-21	3,334	0	0	0	3,273	3,530	3,348	3,502	3,634	3,533	3,693	3,670	3,585	3,628	3,457	3,389	3,271	516	492	24,911	18,337	43,248	689
Forecast 2021-22	3,318	0	0	0	3,266	3,674	3,635	3,389	3,554	3,688	3,581	3,732	3,617	3,617	3,679	3,479	3,391	540	506	25,253	18,827	44,081	833
Forecast 2022-23	3,319	0	0	0	3,307	3,557	3,781	3,678	3,440	3,606	3,738	3,620	3,677	3,649	3,668	3,701	3,480	559	528	25,420	19,262	44,682	602
Forecast 2023-24	3,321	0	0	0	3,282	3,588	3,661	3,825	3,732	3,491	3,654	3,778	3,567	3,709	3,700	3,690	3,702	573	547	25,728	19,488	45,216	534
Forecast 2024-25	3,323	0	0	0	3,285	3,607	3,693	3,702	3,879	3,786	3,539	3,692	3,722	3,599	3,761	3,722	3,691	609	560	25,897	19,664	45,562	346
Forecast 2025-26	3,323	0	0	0	3,291	3,583	3,713	3,736	3,754	3,933	3,835	3,577	3,638	3,755	3,650	3,784	3,723	607	594	26,131	19,750	45,881	319
Forecast 2026-27	3,321	0	0	0	3,286	3,593	3,688	3,755	3,789	3,806	3,983	3,876	3,525	3,670	3,807	3,672	3,784	612	592	26,489	19,663	46,152	272
Forecast 2027-28	3,321	0	0	0	3,287	3,577	3,698	3,730	3,808	3,843	3,854	4,024	3,818	3,557	3,722	3,829	3,673	622	597	26,534	19,818	46,351	199
Forecast 2028-29	3,322	0	0	0	3,287	3,577	3,682	3,741	3,783	3,861	3,892	3,894	3,963	3,851	3,607	3,744	3,830	604	607	26,429	20,206	46,635	284

- Provisional accuracy rate of last year's projection of Oldham's Primary & Secondary Total for 2018/19 is **98.54%**
- Provisional accuracy rate of last year's projection of Oldham's Primary Total for 2018/19 is **98.13%**
- Provisional accuracy rate of last year's projection of Oldham's Secondary Total for 2018/19 is **99.14%**

**Please note** – Year 13 total includes 65 students from Year 14  
**Source:** School Survey (Jan-19) ~ ~ ~ Compiled by Roy Egginton (BIS, OMBC) 23<sup>rd</sup> July 2019

## SCAP 2019 – LA Pupil Forecasting – Oldham & Districts – 10 Years from 2019/20

**PROVISIONAL 4<sup>th</sup> Draft**

### SCAP 2019 – CHADDERTON

Oldham LA Pupil Forecasting - 10 year forecast from 2019-20																						
Chadderton (3530001)																						
Age 31st August	Residence-based totals					School-location-based totals											Total	Total	Total			
	0 (Births)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15				16	17	18
School Year Group	N2					R	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Primary	Secondary	Pri/Sec
2004-05	354					468	464	494	508	490	494	499								3,417		3,417
2005-06	386					488	473	483	501	514	491	496								3,446		3,446
2006-07	394					515	503	480	486	500	513	486								3,483		3,483
2007-08	371					523	522	503	485	497	501	508								3,539		3,539
2008-09	449					536	528	522	513	485	493	500								3,577		3,577
2009-10	417					529	543	528	524	509	487	498								3,618		3,618
2010-11	437					546	534	548	525	523	512	484								3,672		3,672
2011-12	423					539	547	535	552	530	512	514								3,729		3,729
2012-13	452				414	553	541	560	540	545	534	515								3,788		3,788
2013-14	413				371	595	557	543	565	535	550	541								3,886		3,886
2014-15	452				428	591	602	564	544	556	539	549								3,945		3,945
2015-16	405				370	641	637	627	600	567	587	558								4,217		4,217
2016-17	403				425	596	649	650	637	626	582	581								4,321		4,321
2017-18	410				402	648	611	660	658	637	631	589								4,434		4,434
Actual 2018-19	456				386	600	664	619	670	661	635	634								4,483		4,483
Forecast 2019-20	425				376	576	618	678	633	681	672	641								4,498		4,498
Forecast 2020-21	420				387	692	593	631	693	643	692	678								4,622		4,622
Forecast 2021-22	423				429	654	713	606	645	704	653	698								4,674		4,674
Forecast 2022-23	427				397	637	674	728	619	655	715	660								4,688		4,688
Forecast 2023-24	430				404	661	656	688	743	629	666	722								4,766		4,766
Forecast 2024-25	425				410	651	681	670	703	755	640	672								4,773		4,773
Forecast 2025-26	425				404	649	671	696	684	714	767	646								4,828		4,828
Forecast 2026-27	426				406	654	669	685	711	695	726	774								4,914		4,914
Forecast 2027-28	427				407	654	674	683	700	722	706	733								4,871		4,871
Forecast 2028-29	426				407	654	674	688	698	711	734	713								4,871		4,871

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- Provisional accuracy rate of last year's projection of Chadderton's Primary Total for 2018/19 is **97.92%**

**Please note** – Year 13 total includes 65 students from Year 14  
**Source:** School Survey (Jan-19) ~ ~ ~ Compiled by Roy Egginton (BIS, OMBC) 23<sup>rd</sup> July 2019

## SCAP 2019 – LA Pupil Forecasting – Oldham & Districts – 10 Years from 2019/20

**PROVISIONAL 4<sup>th</sup> Draft**

### SCAP 2019 – EAST OLDHAM

Oldham LA Pupil Forecasting - 10 year forecast from 2019-20																						
East Oldham (3530002)																						
Age 31st August	Residence-based totals				School-location-based totals								12	13	14	15	16	17	18	Total	Total	Total
	0 (Births)	1	2	3	4	5	6	7	8	9	10	11								Total	Total	Total
School Year Group	N2				R	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Primary	Secondary	Pri/Sec	
2004-05	720					618	642	582	518	529	517	512							3,918		3,918	
2005-06	712					631	611	630	503	513	507	507							3,902		3,902	
2006-07	711					584	616	597	544	483	498	509							3,831		3,831	
2007-08	697					606	584	608	503	535	476	494							3,806		3,806	
2008-09	727					592	601	572	512	517	531	476							3,801		3,801	
2009-10	721					635	591	585	483	503	506	526							3,829		3,829	
2010-11	724					617	616	565	583	530	571	565							4,047		4,047	
2011-12	667					619	620	621	552	593	532	572							4,109		4,109	
2012-13	745				701	643	626	610	625	553	595	530							4,182		4,182	
2013-14	705				689	675	655	640	638	639	552	595							4,394		4,394	
2014-15	710				675	683	683	670	648	634	642	554							4,514		4,514	
2015-16	748				676	695	692	700	683	671	659	659							4,759		4,759	
2016-17	729				733	655	697	692	680	677	655	664							4,720		4,720	
2017-18	748				695	685	655	690	690	680	659	662							4,721		4,721	
Actual 2018-19	682				705	658	689	652	680	669	683	668							4,699		4,699	
Forecast 2019-20	723				761	666	665	693	651	679	669	695							4,719		4,719	
Forecast 2020-21	726				753	735	673	669	693	651	679	681							4,781		4,781	
Forecast 2021-22	722				685	784	743	678	669	691	651	691							4,907		4,907	
Forecast 2022-23	720				733	762	792	747	677	668	692	662							5,000		5,000	
Forecast 2023-24	715				724	761	770	796	746	676	668	704							5,121		5,121	
Forecast 2024-25	721				714	769	768	774	795	745	676	680							5,207		5,207	
Forecast 2025-26	721				724	763	777	773	773	793	745	688							5,311		5,311	
Forecast 2026-27	720				720	764	771	781	771	771	793	757							5,409		5,409	
Forecast 2027-28	719				719	760	772	775	780	770	771	806							5,434		5,434	
Forecast 2028-29	719				719	760	768	776	774	778	770	784							5,410		5,410	

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- Provisional accuracy rate of last year's projection of East Oldham's Primary Total for 2018/19 is 97.71%

**Please note** – Year 13 total includes 65 students from Year 14  
**Source:** School Survey (Jan-19) ~ ~ ~ Compiled by Roy Egginton (BIS, OMBC) 23<sup>rd</sup> July 2019

## SCAP 2019 – LA Pupil Forecasting – Oldham & Districts – 10 Years from 2019/20

**PROVISIONAL 4<sup>th</sup> Draft**

### SCAP 2019 – FAILSWORTH & HOLLINWOOD

Oldham LA Pupil Forecasting - 10 year forecast from 2019-20																						
Failsworth & Hollinwood (3530003)																						
Age 31st August	Residence-based totals				School-location-based totals								12	13	14	15	16	17	18	Total	Total	Total
	0 (Births)	1	2	3	4	5	6	7	8	9	10	11										
School Year Group				N2	R	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Primary	Secondary	Pri/Sec	
2004-05	385				444	435	444	490	473	430	475								3,191		3,191	
2005-06	404				422	442	439	426	484	468	428								3,109		3,109	
2006-07	423				435	422	441	432	422	471	466								3,089		3,089	
2007-08	404				408	444	422	438	432	421	460								3,025		3,025	
2008-09	371				470	422	434	426	437	432	415								3,036		3,036	
2009-10	396				469	475	422	433	425	435	442								3,101		3,101	
2010-11	414				477	472	479	416	439	423	437								3,143		3,143	
2011-12	434				464	476	477	474	414	431	428								3,164		3,164	
2012-13	430			364	508	465	480	477	468	413	438								3,249		3,249	
2013-14	430			396	467	512	465	482	486	481	413								3,306		3,306	
2014-15	382			414	473	487	507	465	502	488	491								3,413		3,413	
2015-16	417			403	510	493	505	509	487	511	493								3,508		3,508	
2016-17	410			413	515	532	497	524	517	500	518								3,603		3,603	
2017-18	413			398	522	522	538	493	521	520	513								3,629		3,629	
Actual 2018-19	421			411	504	530	520	541	507	525	518								3,645		3,645	
Forecast 2019-20	409			401	476	521	539	529	556	518	535								3,674		3,674	
Forecast 2020-21	414			396	466	493	530	547	544	568	528								3,676		3,676	
Forecast 2021-22	413			404	508	483	501	538	563	555	579								3,727		3,727	
Forecast 2022-23	414			401	489	525	491	509	554	575	566								3,709		3,709	
Forecast 2023-24	414			400	488	506	534	499	524	566	585								3,702		3,702	
Forecast 2024-25	413			402	494	505	514	542	514	535	576								3,681		3,681	
Forecast 2025-26	414			401	490	511	513	523	558	525	546								3,666		3,666	
Forecast 2026-27	414			401	491	507	520	521	538	570	535								3,682		3,682	
Forecast 2027-28	414			401	488	508	516	528	537	549	580								3,706		3,706	
Forecast 2028-29	414			401	488	505	517	524	543	548	560								3,685		3,685	

- Provisional accuracy rate of last year's projection of Failsworth & Hollinwood's Primary Total for 2018/19 is 97.75%

**Please note** – Year 13 total includes 65 students from Year 14  
**Source:** School Survey (Jan-19) ~ ~ ~ Compiled by Roy Eginton (BIS, OMBC) 23<sup>rd</sup> July 2019

## SCAP 2019 – LA Pupil Forecasting – Oldham & Districts – 10 Years from 2019/20

**PROVISIONAL 4<sup>th</sup> Draft**

### SCAP 2019 – ROYTON, SHAW & CROMPTON

Oldham LA Pupil Forecasting - 10 year forecast from 2019-20																						
Royton, Shaw & Crompton (3530005)																						
Age 31st August	Residence-based totals					School location-based totals							12	13	14	15	16	17	18	Total	Total	Total
	0 (Births)	1	2	3	4	5	6	7	8	9	10	11								Total	Total	Total
School Year Group	N2					R	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Primary	Secondary	Pri/Sec
2004-05	375					505	519	535	554	506	558	540								3,717		3,717
2005-06	386					482	510	517	537	551	492	548								3,637		3,637
2006-07	405					495	481	504	514	535	553	490								3,572		3,572
2007-08	415					483	499	474	504	516	533	558								3,567		3,567
2008-09	424					494	498	494	471	505	503	533								3,498		3,498
2009-10	467					483	502	508	494	480	518	500								3,485		3,485
2010-11	442					496	494	506	507	506	477	515								3,501		3,501
2011-12	428					529	504	500	508	511	510	482								3,544		3,544
2012-13	404				420	537	527	504	501	501	514	503								3,587		3,587
2013-14	445				453	536	536	528	512	497	499	517								3,625		3,625
2014-15	412				411	550	538	542	523	523	506	504								3,686		3,686
2015-16	450				406	516	560	537	538	523	523	509								3,706		3,706
2016-17	461				402	510	521	554	544	538	527	518								3,712		3,712
2017-18	422				418	492	511	520	566	543	539	521								3,692		3,692
Actual 2018-19	404				447	507	492	509	524	565	544	539								3,680		3,680
Forecast 2019-20	430				456	468	511	492	516	526	569	544								3,625		3,625
Forecast 2020-21	433				425	498	472	511	498	517	529	569								3,595		3,595
Forecast 2021-22	430				403	541	502	472	518	500	521	529								3,583		3,583
Forecast 2022-23	424				428	544	545	502	478	519	504	521								3,613		3,613
Forecast 2023-24	424				419	528	548	545	508	480	523	504								3,637		3,637
Forecast 2024-25	428				417	538	532	548	552	510	483	523								3,687		3,687
Forecast 2025-26	428				421	537	542	532	555	554	514	484								3,717		3,717
Forecast 2026-27	427				419	534	541	542	539	557	557	514								3,784		3,784
Forecast 2027-28	426				419	533	539	541	549	541	561	557								3,820		3,820
Forecast 2028-29	427				419	533	537	539	548	550	544	561								3,812		3,812

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- Provisional accuracy rate of last year's projection of Royton, Shaw & Crompton's Primary Total for 2018/19 is 99.51%

**Please note** – Year 13 total includes 65 students from Year 14  
**Source:** School Survey (Jan-19) ~ ~ ~ Compiled by Roy Egginton (BIS, OMBC) 23<sup>rd</sup> July 2019



## SCAP 2019 – LA Pupil Forecasting – Oldham & Districts – 10 Years from 2019/20

**PROVISIONAL 4<sup>th</sup> Draft**

### SCAP 2019 – SADDLEWORTH & LEES

Oldham LA Pupil Forecasting - 10 year forecast from 2019-20																						
Saddleworth & Lees (3530004)																						
Age 31st August	Residence-based totals					School-location-based totals							12	13	14	15	16	17	18	Total	Total	Total
	0 (Births)	1	2	3	4	5	6	7	8	9	10	11										
School Year Group				N2	R	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Primary	Secondary	Pri/Sec	
2004-05	274				365	384	381	390	390	394	367								2,671		2,671	
2005-06	278				363	372	391	382	402	403	396								2,709		2,709	
2006-07	280				380	369	376	392	390	402	406								2,715		2,715	
2007-08	253				417	372	377	373	393	391	399								2,722		2,722	
2008-09	267				397	418	383	375	376	393	396								2,738		2,738	
2009-10	256				414	399	427	388	381	376	380								2,765		2,765	
2010-11	316				423	421	397	427	389	382	383								2,822		2,822	
2011-12	253				435	420	424	406	424	394	380								2,883		2,883	
2012-13	270			272	437	441	415	423	407	428	404								2,955		2,955	
2013-14	276			272	446	448	446	420	423	411	425								3,019		3,019	
2014-15	263			312	434	449	453	443	420	420	412								3,031		3,031	
2015-16	281			284	466	443	454	455	445	424	421								3,108		3,108	
2016-17	272			299	417	470	449	457	451	446	426								3,116		3,116	
2017-18	252			288	421	451	471	446	457	448	451								3,145		3,145	
Actual 2018-19	245			302	446	448	415	464	445	448	445								3,111		3,111	
Forecast 2019-20	263			313	409	469	441	415	465	444	451								3,093		3,093	
Forecast 2020-21	263			278	449	430	461	440	416	464	446								3,106		3,106	
Forecast 2021-22	259			272	477	472	423	461	441	415	466								3,155		3,155	
Forecast 2022-23	256			288	464	501	464	423	462	440	417								3,171		3,171	
Forecast 2023-24	257			279	463	488	493	464	424	460	443								3,234		3,234	
Forecast 2024-25	259			280	469	487	480	492	465	423	463								3,278		3,278	
Forecast 2025-26	259			282	466	493	479	479	493	463	425								3,298		3,298	
Forecast 2026-27	258			280	466	489	485	478	480	491	466								3,355		3,355	
Forecast 2027-28	258			281	463	489	481	484	479	478	494								3,369		3,369	
Forecast 2028-29	258			281	463	487	481	481	485	478	481								3,356		3,356	

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- Provisional accuracy rate of last year's projection of Saddleworth & Lees's Primary Total for 2018/19 is 97.95%

**Please note** – Year 13 total includes 65 students from Year 14

**Source:** School Survey (Jan-19) ~ ~ ~ Compiled by Roy Egginton (BIS, OMBC) 23<sup>rd</sup> July 2019

# SCAP 2019 – LA Pupil Forecasting – Oldham & Districts – 10 Years from 2019/20

**PROVISIONAL 4<sup>th</sup> Draft**

## SCAP 2019 – WEST OLDHAM

Oldham LA Pupil Forecasting - 10 year forecast from 2019-20																						
West Oldham (3530006)																						
Age 31st August	Residence-based totals					School-location-based totals							12	13	14	15	16	17	18	Total	Total	Total
	0 (Births)	1	2	3	4	5	6	7	8	9	10	11								Total	Total	Total
School Year Group	N2					R	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Primary	Secondary	Pri/Sec
2004-05	1,094					527	548	543	597	579	553	576								3,923		3,923
2005-06	1,128					553	520	533	616	593	584	552								3,951		3,951
2006-07	1,148					556	551	519	613	615	606	596								4,056		4,056
2007-08	1,061					557	559	548	604	609	618	605								4,100		4,100
2008-09	1,107					591	560	549	634	590	596	607								4,127		4,127
2009-10	1,082					594	583	549	609	629	581	591								4,136		4,136
2010-11	995					652	635	613	575	571	564	531								4,141		4,141
2011-12	1,069					643	656	647	609	580	574	573								4,282		4,282
2012-13	1,033				988	646	646	661	647	611	569	581								4,361		4,361
2013-14	1,042				971	657	665	654	659	648	618	574								4,475		4,475
2014-15	1,061				945	655	672	673	656	663	649	623								4,591		4,591
2015-16	1,112				956	641	678	678	688	664	681	665								4,695		4,695
2016-17	1,035				998	659	669	696	718	733	718	694								4,887		4,887
2017-18	1,069				972	683	694	701	721	740	723	701								4,963		4,963
Actual 2018-19	1,099				1,008	646	715	714	714	738	765	733								5,025		5,025
Forecast 2019-20	1,075				1,075	655	677	739	738	738	761	772								5,080		5,080
Forecast 2020-21	1,078				1,033	689	687	700	763	763	761	768								5,130		5,130
Forecast 2021-22	1,071				1,072	710	722	709	723	789	786	768								5,208		5,208
Forecast 2022-23	1,078				1,060	661	744	746	733	748	813	794								5,239		5,239
Forecast 2023-24	1,080				1,055	687	693	769	771	758	771	821								5,269		5,269
Forecast 2024-25	1,077				1,063	686	720	716	794	797	781	778								5,272		5,272
Forecast 2025-26	1,077				1,059	678	719	744	740	821	821	789								5,311		5,311
Forecast 2026-27	1,077				1,059	683	711	742	769	765	846	829								5,345		5,345
Forecast 2027-28	1,078				1,060	678	716	734	767	794	789	853								5,332		5,332
Forecast 2028-29	1,078				1,060	678	711	740	759	793	819	796								5,295		5,295

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- Provisional accuracy rate of last year's projection of West Oldham's Primary Total for 2018/19 is 98.09%

**Please note** – Year 13 total includes 65 students from Year 14  
**Source:** School Survey (Jan-19) ~ ~ ~ Compiled by Roy Egginton (BIS, OMBC) 23<sup>rd</sup> July 2019

# Appendix F

## Pupil Projection Methodology 2019 Business Intelligence Service (OMBC) - July 2019

### 1. Introduction

- The purpose of forecasting pupil numbers is to satisfy statutory obligations to meet Basic Need (demand for additional school places) and to assess the extent to which a surplus or deficit of places is likely to occur in the future.
- The DfE requires 5 year forecasts for primary and 7 year forecast for secondary.
- The DfE only provides guidance on the creation of a pupil forecasting model. As a result the forecasting methodologies, data inputs, choice of base geography, and assumptions, vary between local authorities. Although there are differences Oldham's approach is similar to other local authorities.
- The Oldham pupil forecasting model is based on a cohort survival principle, i.e. the percentage of each year group that "survives" to the next year. This uses a weighted average of cohort survival going back through time, with most recent figures having a higher weighting.
- The model captures demographic change and retention, cross boundary movement, and inward migration.
- The 2019 update, like last year's, has re-applied the model adopted in 2016 which utilises a more complicated methodology for reception-age forecasts than previous years. This change is based on analysis of 2015 data (see section 3)
- Compared to pre-2016, when various models were built and then one selected, the current model allows for some flexibility around the inclusion of extra migration and housing yield.
- Apart from these changes, forecasts have a consistent basis with previous overall methodology.

### 2. Context

- School rolls continue to rise across Oldham, and this is putting pressure on the provision of school places across the borough.
- This pressure is now being felt and demand for primary school places has grown considerably, by 8.5% between 2014 and 2019.

### 3. Accuracy of Previous Projections

- The DfE recommends that the first piece of work each year should be analysis of the previous year's accuracy. Their guidelines suggest that the percentage accuracy (actual minus forecast, divided by actual) should be within 2%.
- For Oldham overall the accuracy is fairly good, although, accuracy varies by year group and by collaborative (district).

	Year Group																
Collaborative	R	1	2	3	4	5	6	7	8	9	10	11	12	13	Primary	Secondary	Pri/Sec
<b>Oldham:</b>																	
Forecast for 2018/19	3,579	3,553	3,506	3,643	3,637	3,632	3,563	3,417	3,359	3,284	3,205	3,087	488	388	25,113	17,228	42,341
Actual 2018/19	3,361	3,538	3,429	3,593	3,585	3,600	3,537	3,377	3,319	3,247	3,121	3,027	518	471	24,643	17,080	41,723
Accuracy %	6.1	0.4	2.2	1.4	1.4	0.9	0.7	1.2	1.2	1.1	2.6	1.9	-6.1	-21.4	1.87	0.86	1.46
<b>Chadderton:</b>																	
Forecast for 2018/19	647	668	626	676	670	653	638								4,578		
Actual 2018/19	600	664	619	670	661	635	634								4,483		
Accuracy %	7.3	0.6	1.1	0.9	1.3	2.8	0.6								2.08		
<b>East Oldham:</b>																	
Forecast for 2018/19	708	694	663	695	698	680	671								4,809		
Actual 2018/19	658	689	652	680	669	683	668								4,699		
Accuracy %	7.1	0.7	1.7	2.2	4.2	-0.4	0.4								2.29		
<b>Failsforth &amp; Hollinwood:</b>																	
Forecast for 2018/19	533	542	533	547	507	533	534								3,729		
Actual 2018/19	504	530	520	541	507	525	518								3,645		
Accuracy %	5.4	2.2	2.4	1.1	0.0	1.5	3.0								2.25		
<b>Royton, Shaw &amp; Crompton:</b>																	
Forecast for 2018/19	505	498	512	527	569	548	539								3,698		
Actual 2018/19	507	492	509	524	565	544	539								3,680		
Accuracy %	-0.4	1.2	0.6	0.6	0.7	0.7	0.0								0.49		
<b>Saddleworth &amp; Lees:</b>																	
Forecast for 2018/19	448	438	457	473	448	459	453								3,176		
Actual 2018/19	446	448	415	464	445	448	445								3,111		
Accuracy %	0.4	-2.3	9.2	1.9	0.7	2.4	1.8								2.05		
<b>West Oldham:</b>																	
Forecast for 2018/19	738	713	715	725	745	759	728								5,123		
Actual 2018/19	646	715	714	714	738	765	733								5,025		
Accuracy %	12.5	-0.3	0.1	1.5	0.9	-0.8	-0.7								1.91		

## Analysis

- Figures for reception classes are least accurate. Reception class sizes are most difficult to estimate, as in all other cases there are younger cohorts to base the estimate on.
- Estimates for reception are based on births in each ward (and aggregated at the district level) but children cross ward boundaries to go to school. Thus we need to use information that captures flow to school.

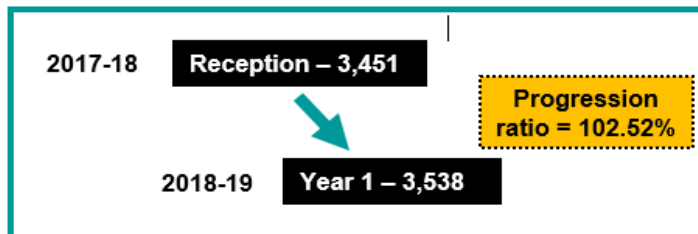
## 4. Amendments to Methodology for 2019

Issue	Detail	Change for 2019
None		

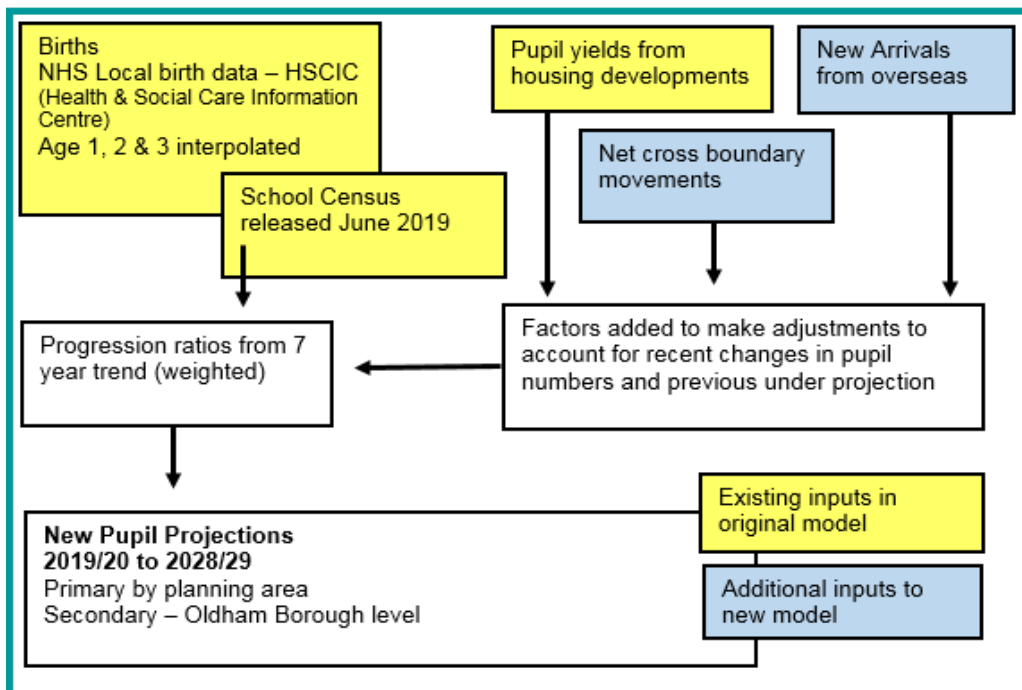
## 5. Forecasting Methodology

- The model used has been based on progression ratios; this is a measure, as a percentage, whether the cohort has increased or decreased in number as it has progressed to the next year. A ratio greater than 100% indicates an increase in number and less than 100% a decrease.
- The numbers for each school year are from the school census released in early January 2019. School census data is available at an aggregated level from the CorVu School Census dashboard

### The Cohort 'Survival' Principle Illustrated



## Model Overview and Inputs



## 6. Forecasting Reception Age Pupils

- The biggest change to the model has been the process for projecting reception-age children.
- In previous years, ward level birth totals were used as a starting point. However, there is much movement between birth and starting school, and there are also many primary-school journeys that cross ward boundaries.
- The process can be summarised as follows:

### A. For each ward:

1. Count the number of residents of reception age in Spring 2019
2. Count the number of residents of N2 age in Spring 2019 (by combining state nursery and private nursery censuses)
3. Calculate a progression ratio (residence-based) for each ward from (1) and (2). This quantifies the degree to which not all 3 year-olds go to nursery, by ward.
4. Count the number of residents of N2 age in Spring 2019
5. Apply the progression ratio to (4) to get an estimate of the number of reception-age residents for academic year 2019-20 by ward

### B. For each primary school:

6. Count the number of reception-age pupils coming from each ward in Spring 2019

7. Turn that into a rate (e.g. 40% of pupils in school X reception come from Ward Y, and 60% come from Ward Z)
8. On the assumption this home to school flow pattern will continue, estimate the number of reception pupils for year 2018-19 for each school by applying the rates in (7) to the cohort-size estimates by ward in (5)

C. Sum the school totals to collaboratives.

## 7. Migration – New Arrivals

- Recent migration of school-aged children into and out of Oldham has been calculated by using the school census.
- Using consecutive years of the census, we can see individual children leaving or arriving, so we know their school and year group.
- The 2016 model was more flexible than previous models in how migration data was used. In 2016 a weighted average was calculated to facilitate an estimate of the levels of migration to be accounted for by progression ratios. This was replicated in 2017, 2018 and again for 2019.
- Recognising the significant increase in inward migration into Oldham from 2015, two alternative migration figures are calculated. One assumes that this increase will be sustained, taking the maximum figure from the last 3 years for each year group and collaborative (in most cases is the most recent year). The second takes an unweighted average over 5 years – giving a figure that is not so biased towards recent years.
- These two measures can be used to adjust the impact of migration of projections. Settings on the 'Info' sheet allow for either of these two models of migration to be chosen

## 8. Housing Development and Pupil Yield

- Housing estimates and guidance were taken directly from work undertaken by BIS in 2015.
- The model takes into account future housing growth. Future new housing developments have been identified from the housing land supply.
- The numbers of units, housing size and mix, location and completion timescale have all been taken into account.
- A development programme was calculated with delivery of houses in the next 5 years and 6 to ten years that have met the 'principles of development' or that can be justified that the development is very likely to proceed.
- Pupil yield factors were calculated based on the number of children per dwelling, as follows: primary pupil yield 0.24 per dwelling, secondary pupil yield 0.17 per dwelling.
- Pupil yields from new housing developments generated an increased numbers of pupils within the model - 1,373 pupils (804 primary pupils and 569 secondary pupils) in total over the next 10 years.
- Although great care has been taken to identify the likelihood and timing of sites coming forward it is subject to several factors:
  - The current economic scenario, i.e. if there is a recession
  - Developers are willing to develop sites if they are not economically viable (due to high development costs on land-locked sites, and low house prices where demand is low, both affecting profitability)

- The buoyancy of the local housing market. If house sales are slow house building will not occur at assumed rates and potential pupils from those sites will not be generated.
- Developers can change the rate and type of build at short notice which is difficult to predict/track; the new housing may not be completed and occupied according to the originally planned timescales.
- If new house building does not attract in-migration into the Borough
- The impact of ongoing housing developments causing 'internal' migration may be reflected in the historical uptake, factors which have been determined and used to produce projections at year group level through increases over time in cohort survival rate
- Housing developments may not actually increase the overall number of children attending schools in an area, but they may have an impact on where the children go to school in that area, particularly if there is a corresponding pattern of demolition. Therefore, increasing pupil numbers at a school due to new housing may result in decreasing numbers at another school.
- Occasionally the impact of a new housing development may take some time to materialise, i.e. there may be no initial effect, followed by a bulge effect after 2 or 3 years which then tails away.

## 9. Updating the forecasts for future years

This description assumes you will use the same methodology but update the data for the next academic year.

### **'N2 Counts Sheet'**

- To use the example of 2019 - The State Nursery 2019 figures have been calculated by summing the number of children in each ward.
- The Private nursery 2019 figure is similarly calculated.
- You will need to obtain the most recent censuses for both State and Private nurseries from Business Intelligence Service (BIS), Oldham Council at the individual level, and add a column where you derive the ward for each child from the postcode

### **'N2 and R by home' Sheet**

- The following ratio is calculated: the number of children in a ward in Reception year to the number in the same cohort who were in N2 the previous year. This is the equivalent of a progression ratio, but using home addresses
- An estimate of the numbers of children in the N2 nursery year from birth data is formulated. This data comes from the 'Birth to N2' sheet. These will need rolling on a year
- Then a final estimate of the number of reception age children living in each ward by multiplying the N2 estimates by the progression ratio. These will need rolling on a year

### **'Birth to N2' Sheet**

- Births by ward are available from BIS, OMBC through a public health system, so a recent set of actual figures can be added each year
- Numbers of children in N2 (the academic year prior to reception year), calculated from censuses in both public and private censuses. These columns use data from the sheet 'N2 and R by home'
- An estimate of how many children of N2 age will be in each ward in the future is also undertaken

## **'R by School' Sheet**

- The number of reception children living in each ward are counted who attend each primary school and is calculated from the most recent spring school census.
- The percentage of reception-age children who live in a particular ward go to a particular school is also calculated and further formulae are utilised to estimate reception-age children in each ward
- Another formula is then used to estimate the number of children going to reception year-group in each school, based on numbers projected to be living in each ward, and rates of flow from ward to schools

## **'New Students', 'leavers' and 'Net Migration' sheets**

- Data on these two sheets comes directly from corresponding information in the school census calculations.
- Consecutive school censuses are used to identify (using UPN codes), and the aggregate the numbers of children who are not present in consecutive censuses.
- Totals are aggregated for each year group and collaborative
- The Net Migration sheet calculates figures for each academic year and year group, and as well as calculations of the different types of averages



# Appendix G

## Example of Decision Support Matrix

### Stage 1

School	Planning Area	Ward	CRITERIA / RANKING				
			Site suitability	Condition Issues	Planning Issues	TOTAL Ranking	Pass / Fail
Northland Primary	North Oldham	Chadderton North	3	2	1	6	FAIL
Westland Primary	West Oldham	Failsworth West	3	3	3	9	PASS
Eastland Primary	East Oldham	Chadderton Central	4	4	4	12	PASS
Southland Primary	South Oldham	Chadderton South	1	1	2	4	FAIL
Oldham Primary	North Oldham	Chadderton North	4	3	4	11	PASS

### Stage 2

School	Planning Area	Ward	CRITERIA / RANKING							
			Ofsted rating	Weighted Ofsted rating (15%)	Parental Choice	Weighted Parental Choice (50%)	Cost	Weighted cost (35%)	TOTAL Ranking	Weighted Score
Westland Primary	West Oldham	Failsworth West	4	60%	3	150%	3	105%	10	315%
Eastland Primary	East Oldham	Chadderton Central	3	45%	3	150%	3	105%	9	300%
Oldham Primary	North Oldham	Chadderton North	1	15%	1	50%	1	35%	3	100%

## Scoring / Ranking Criteria

Ofsted Rating	Score / Ranking
Special Measures	0
Requires Improvement	0
Good	3
Outstanding	4

Parental Choice - % of first choice preference versus PAN	Score / Ranking
Less than 50%	0
50% - 75%	1
75% - 100%	2
100% - 200%	3
Above 200%	4

Cost	Score / Ranking
Rank schemes on cost per place / pupil from 1 - 4	1 to 4

Site Suitability - for education requirement	Score / Ranking
Unsuitable - Design options not available to meet brief	1
Partially meet rqmts or significant compromise	2
Partially meet rqmts or slight compromise	3
Design options meet requirements	4

Condition Issues of existing school	Score / Ranking
Condition issues significantly affect scheme	1
Condition issues can be overcome - major difficulties	2
Condition issues can be overcome - minimal	3
Solution solves or benefits from condition of building	4

Planning Issues	Score / Ranking
Major planning issues	1
Highly unlikely to receive planning	2
Likely to receive challenge - but anticipate achievable	3
Planning is likely without significant challenge	4

# Appendix H

## Basic Needs Grant allocation

The Council has a total Basic Needs Grant allocation of £48.1m for the period 2017/21 (£15.4m 2017/18, £22.8m 18/19, £9.9m 19/20 and nil in 20/21).

Notification on Basic Needs Grant for 2021/22 will not be given until after the Comprehensive Spending review.

The allocation of £34.667m (including this proposal) and the remaining amount of £13.430m are shown in the table below.

<b>Capital Project</b>	<b>Basic Needs Grant Allocation (£m)</b>
Crompton House	10.829
Oldham Academy North	5.000
Feasibility Costs	0.100
Greenfield CP	1.862
Royton and Crompton	5.000
Holy Trinity	0.250
Oasis Academy – Dining Room	0.575
Oasis Academy – UTC adaptations	0.350
North Chadderton Expansion	3.400
Kingfisher (Expansion)	0.750
Kingsland School (Laurel Bank)	0.240
Clarksfield Primary (Oasis)	2.904
Hollinwood Academy contribution	0.390
St Herbert's	0.217
Mayfield Academy	2.500
Hollinwood Academy Additional Contribution (This report)	0.300
<b>Total Allocated</b>	<b>34.667</b>
Total Grant	48.097
<b>Amount Available for Allocation</b>	<b>13.430</b>

## **Appendix I**

### **Education Provision Group Terms of Reference**

# **Education Provision Group (EPG)**

## **Terms of Reference**

September 2019

**Purpose:** A consultative group that will collectively act as decision maker to ensure Oldham LA meets its statutory duties around the planning of schools and settings places and to inform the need to undertake capital works to expand existing or build new schools.

# 1. Context and LA Duties

- 1.1 Oldham Council has a statutory duty to secure good educational outcomes for all its children and young people in state funded education, regardless of the status of the provider institutions.
- 1.2 The Council has a statutory duty to ensure that sufficient school places are available within its area for every child of school age whose parents wish them to have one; to promote diversity, parental choice and high educational standards; to ensure fair access to educational opportunity and to protect the interests of the most vulnerable.
- 1.3 The Council also has a duty to respond to any representations from parents and carers who are not satisfied with the provision of schools in the local area. This could be regarding size, type, location or quality of school provision.
- 1.4 Early Years statutory duties include; ensuring secure sufficient childcare is available for working parents and to:
  - monitor and manage the childcare market;
  - undertake a Childcare Sufficiency Assessment review (CSA) and respond to changes in the childcare market;
  - Ensure there are sufficient places available to meet a legal entitlement for eligible 2, 3 and 4 year olds to access fifteen hours per week free early education across childcare providers;
  - Ensure provision is in place to provide information, advice and assistance to parents and prospective parents for children 0-25; and to
  - Ensure provision is in place to provide information, advice and training to childcare providers.
- 1.8 Changes in the provision of maintained school places mean that new providers are able to establish state-funded Free Schools. There are also a growing number of academies, which are independent of Local Authority (LA) control. School places are no longer therefore solely provided by Oldham Council; the Council must work with other providers to ensure that the demand for high quality school places is met.
- 1.9 There has been no statutory requirement to publish an Education Provision Strategy since 2004. However, it is considered good practice to produce a plan related to school place planning to clearly set out the framework for, and approach towards, the strategic provision of high-quality places.
- 1.10 This strategic approach shows local communities, and those interested in their development, how we expect school provision to change over the next few years. It brings together information from a range of sources and sets out the issues the Council will face in meeting its statutory duties for providing school places in the period 2020 – 2024.
- 1.11 The information from which our strategy will be developed includes present and predicted future pupil numbers, together with information about birth rates, school capacity and new housing. The strategy will set out proposed changes in the number of school places available over the next 4 years and it suggests where other changes may be necessary in the future.

## 2. School Organisation Context

2.1 In October 2019, education provision in Oldham is as set out in Appendix A and this strategy.

2.2 The Council has recently expanded 2 existing secondary schools and here are plans to expand 2 more. In addition, 2 new free schools are due to open in the borough in 2020 (Oasis Leesbrook) and 2022 (Blue Coat 2)

The Council has also recently funded a significant expansion at Hollinwood Academy (Special School).

2.3 In addition the Council has also recently funded the expansion of 2 primary schools in the borough (Clarksfield Primary and Mayfield Primary).

## 3. Current School organisation demands

3.1 The number of in year school transfers has increased year on year since 2010/11 and continues to rise. This is largely due to the number of children and young people moving into the borough from abroad. In the main the above families are moving into council owned housing in two of the six districts; Chadderton and Central Oldham.

3.2 Primary provision is currently stable, however there is a requirement to increase the number of places in the Chadderton Planning area.

3.3 Borough wide pupil projections show a continual increase in pupil numbers throughout the 2020s.

3.4 There is significant pressure in the secondary sector and this being dealt with by a number of expansions and new build provision.

3.5 The DFE estimates that approximately 400,000 – 500,000 additional pupil places will be required in both the primary and secondary sectors nationally between 2015 and 2024.

## 4. Early Years Settings

4.1 Childcare providers are privately run childcare businesses that operate under a small business model. The market can be unpredictable and subject to change at any time. Oldham Council has to manage and monitor the childcare market to ensure that there is sufficient childcare for working parents.

4.2 The childcare market is fluid and the number of settings can change throughout the year. Parents have a choice where they take up childcare and many of the providers are private childcare businesses. The current childcare provision in Oldham includes;

4.3 The government policy from September 2014 has been to expand two-year-old places and a capital programme has been put in place.

## 5. Policies and Legislation

5.1 All decisions and arrangements will be made using the following legislation and policies;

- School Admissions Code - February 2012
- The academy/free school presumption departmental advice - February 2014
- Establishing new maintained schools departmental advice - June 2013
- School Organisation Guidance - January 2014
- Early Education and Childcare – September 2014
- Children and Families Act – September 2014

## 6. Management arrangements and decision making

6.1 To inform its duties as decision maker for school organisation issues Oldham Council has Education provision Group comprising Officers from Education and Early years, Regeneration, Schools, Business Intelligence, Corporate Assets, Finance, Preventative Services and Housing Strategy.

6.2 The key activities of the group are to:

- Discuss and inform the overall strategy for school and early years organisation in order to meet LA statutory duties
- Discuss developing options in relation to school and childcare expansions and new builds
- Endorse recommendations to the Cabinet Member for Education and Skills and Early Years, the Capital Investment Programme Board, Council Leadership and Cabinet where appropriate.
- Comment on statutory information and any written comments and objections as part of the statutory process
- Discuss and consider proposals for Free Schools, University Technology Colleges and other academies
- Review the effectiveness of existing and proposed admissions arrangements in serving the interests of children and parents within the area of the LA
- Monitor demand for and access to places and admission patterns

6.3 Recommendations made by the EPG will be reported, when relevant, initially to (See process).

## 7. School and Early Years forecast methodology

7.1 October Census data will be circulated and discussed at the December EPG meeting.

7.2 January Census data will be circulated and discussed at the March EPG Meeting.

7.3 There will be an annual refresh of projection work and forecasts.

## **8. School and Early Years place planning data**

- 8.1 School Organisation spreadsheet will be brought to December EPG meeting.
- 8.2 School Organisation spreadsheet will be brought to March EPG meeting.
- 8.3 DFE return SCAP – draft commentary on school capacity and methodology will be discussed at May PSSPG meeting.

## **9. Review arrangements**

- 9.1 The Group to participate in consultations and take feedback to and from the sector they represent.
- 9.2 The Group will review the terms of reference annually.

## **10. Aligned arrangements**

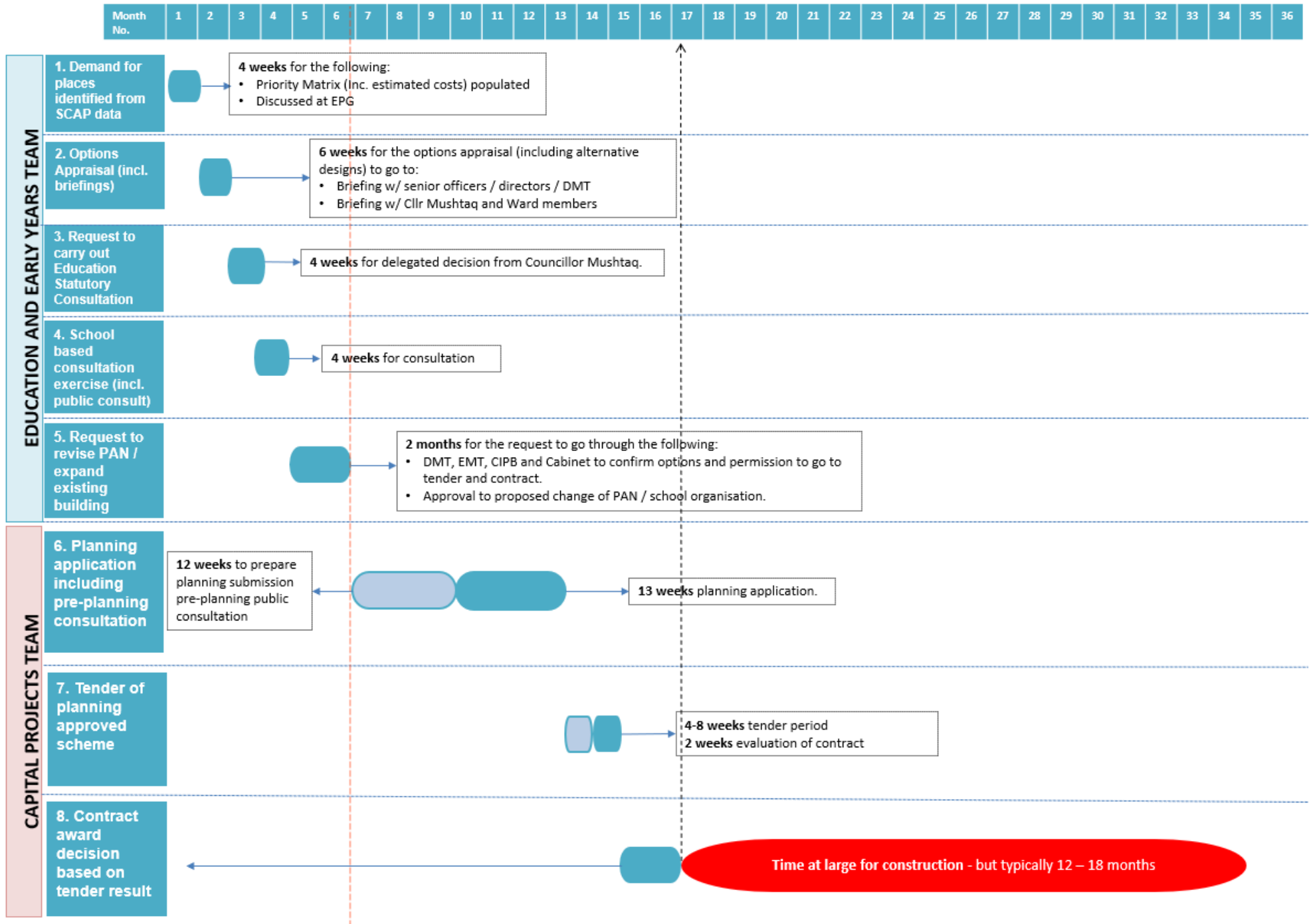
- 10.1 Service level agreement with Local Authority
- 10.2 Partnership with all Schools, Academies, Free Schools and Early Years Settings
- 10.3 Directorate and corporate objectives
- 10.4 Cooperative agenda
- 10.5 Other arrangements as agreed by the EPG
- 10.6 Education Provision Strategy



# Appendix J

## Potential Future Delivery Route 2019 - Maintained

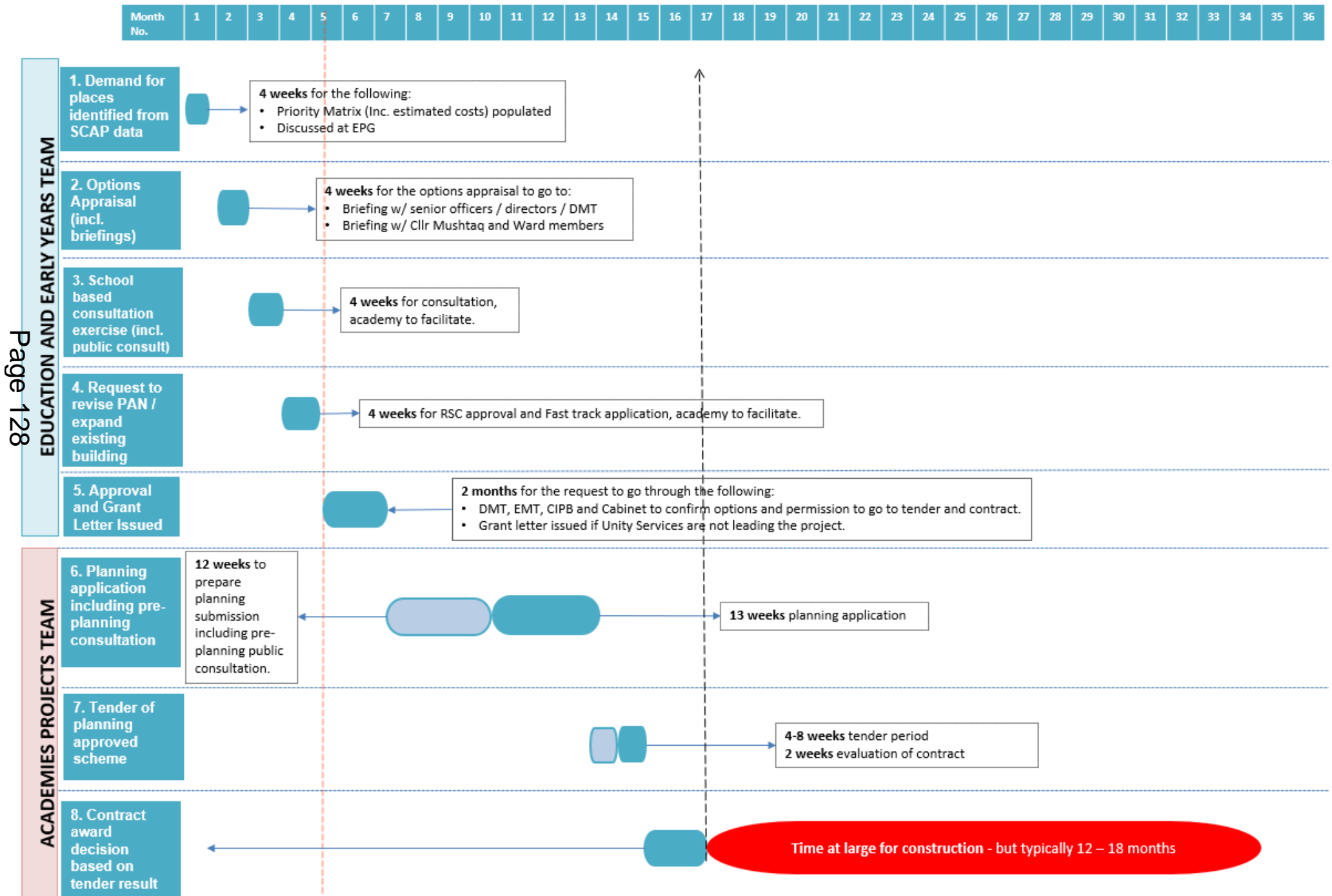
----- Start of Capital Works



# Appendix K

Start of Capital Works

## Potential Future Delivery Route 2019 - Academies



## **Appendix L**

### **Schemes Considered as Priority – 2019/20**

#### **Primary :-**

- Providing an additional 1 FE in the Chadderton Planning Area.

#### **Secondary :-**

- Working with the Cranmer Trust and Oasis Academy Trust regarding establishment of 2 new secondary academies in the borough

#### **Special schools:-**

- Working with the Kingfisher Trust regarding the establishment of Halcyon Way Free Special School
- Working with local special school trusts and maintained schools to plan effectively for future demands on the provision of special school places and/or resource provision in maintained schools.

#### **Alternative Provision:-**

- Continue to expand the Pupil Referral Unit to ensure that it can provide adequate places to meet demand and offer a more holistic provision for the pupils under its care
- Continue to work with the Pupil Referral Unit to develop its offer to schools regarding programmes of work to prevent and reduce exclusions from mainstream schools
- Further explore plans and strategies to reduce the number and cost of 'out of borough' placements.

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## Report to CABINET

### Saddleworth School Update

**Portfolio Holder:** Cllr Shaid Mushtaq (Cabinet Member of Education and Skills); Cllr Sean Fielding, Leader of the Council and Cabinet Member for Economy and Enterprise

**Officer Contact:** Emma Barton, Director of Economy

**Report Author:** Andrew Hall, Principal Regeneration Officer  
**Ext. 3456**

**21<sup>st</sup> October 2019**

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#### Reason for Decision

The purpose of the report is to update Cabinet on works that will need to be carried out by the Council in support of the replacement Saddleworth School on the former WH Shaw site.

#### Recommendations:-

1. The capital programme be amended to accommodate and allocate to this scheme the revised expenditure needed.
2. The land transaction arrangements to facilitate the scheme be approved.
3. The Director of Legal Services or his nominated representative be authorised to sign and/or affix the Common Seal of the Council to all the documents and associated ancillary documents, reports and paperwork referred to in this report and/or required to give effect to the recommendations in this report.
4. The Director of Finance or her nominated representative be authorised to negotiate and sign off the revised Section 151 Letters required to facilitate the scheme and any associated and/or ancillary documents reports and paperwork referred to in this report and/or required to give effect to the recommendations in this report.

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**Saddleworth School Update****1 Background**

- 1.1 The development of a new Saddleworth School was initially proposed under the Building Schools for the Future initiative, with Cabinet approving the outline business case on 26 January 2009.
- 1.2 In March 2013, the Council was advised that, subject to securing a site, funding would be made available to develop a replacement Saddleworth School under the Priority Schools Building Programme (PSPB).
- 1.3 Cabinet (30th March 2015) gave support to the preferred option in the Education Funding Agencies (EFA) Feasibility Study completed in January 2015. The Study identified land to the back of the former WH Shaw Pallet Works Site in Diggle as the preferred site for the construction of the new school..
- 1.4 Following the finding of a judicial review (March 2017), the decision to grant planning permission was quashed. However, an application was resubmitted on the Diggle site with the applications being reconsidered by the Planning Committee and subsequent approval granted on the 17<sup>th</sup> June 2019.

**2 Current Position**

- 2.1 Planning consent for a new Saddleworth School on the WH Shaw Works Site in Diggle along with planning consents for access and wider highway works; the demolition of the WH Shaw Works Site and listed building consent for the demolition of the link bridge have now been confirmed, following the expiry of the judicial review period. This means that progress can now be made on the building project which once finished will provide pupils with a modern school. The number of places to be provided at the school is to increase from 1,350 to 1,500 to meet increasing demand for spaces.
- 2.2 As previously reported to Cabinet in March 2015 it was acknowledged that the scope and cost of the approved works may fluctuate and that unforeseen issues may arise such that costs for this project could increase.
- 2.3 The purpose of this report is to request additional funds and to request that the approval of updated Heads of Terms for the land transaction is also delegated.

**3 Options/Alternatives**

- 3.1 Option 1 – agree the recommendations  
Option 2 – do not agree the recommendations

**4 Consultation**

- 4.1 As set out in the report in the restricted part of this agenda.

**5 Financial Implications****5.1 Capital Implications**

- 5.1.1 As set out in the report in the restricted part of this agenda.

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5.2 Revenue Implications

5.2.1 As set out in the report in the restricted part of this agenda.

6 **Legal Services Comments**

6.1 As set out in the report in the restricted part of this agenda.

7. **Co-operative Agenda**

7.1 The improvement of education standards, especially at secondary level, is a key priority for the Council and in respect to the co-operative agenda is helping to deliver an inclusive economy where ambition and mobility is supported and encouraged. In terms of thriving communities, the new school will provide a stronger basis for improved partnerships and improved learning. The main contractor responsible for the school build has committed to a local labour agreement in construction.

8 **Risk Assessments**

8.1 As set out in the report in the restricted part of this agenda.

9 **IT Implications**

9.1 As set out in the report in the restricted part of this agenda.

10 **Property Implications**

10.1 As set out in the report in the restricted part of this agenda.

11 **Procurement Implications**

11.1 As set out in the report in the restricted part of this agenda.

12 **Environmental and Health & Safety Implications**

12.1 As set out in the report in the restricted part of this agenda.

13 **Equality, community cohesion and crime implications**

13.1 As set out in the report in the restricted part of this agenda.

14 **Equality Impact Assessment Completed?**

14.1 As set out in the report in the restricted part of this agenda.

15 **Key Decision Reference**

15.1 ECEN-11-19

16 **Background Papers**

16.1 Jan 2009: CABINET:BUILDING SCHOOLS FOR THE FUTURE;

July 2014: CABINET: ACQUISITION OF FORMER WH SHAW PALLET WORKS  
HUDDERSFIELD ROAD, DIGGLE FOR REPLACEMENT SADDLEWORTH SCHOOL;

17 **Appendices**

17.1 None





## Report to CABINET

# Broadway Green – Construction of Link Road Phase 2B

### Portfolio Holder:

Cllr Sean Fielding (Leader) – Cabinet Member for Economy and Enterprise.

**Officer Contact:** Helen Lockwood, Deputy Chief Executive – People and Place.

**Report Author:** Liz Garsrud, Principal Surveyor, Economy Directorate. Ext: 4284

**21<sup>st</sup> October 2019**

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### Reason for Decision

The purpose of the report is to update the Cabinet on the progress made regarding the Broadway Green Development and to seek approval to the provision of a commercial loan to the Joint Venture company delivering the project.

### Recommendations:-

1. The progress made regarding the Broadway Green Development and the Joint Venture company delivering the final phase of the new link road be noted.
2. The provision of a commercial loan to the Joint Venture company delivering the scheme, on the terms set out in section 2 of this report be approved.
3. The Directors of Finance and Legal, or their nominated representatives, be authorised to approve the final loan agreement.
4. The Director of Legal Services be authorised to execute a commercial loan agreement and any other ancillary documentation relating to the loan and the security for the loan and any documentation relating to the joint venture legal agreements.
5. The Director of Legal Services, or his nominated representative, be authorised to sign off and/or affix the Common Seal of the Council to all the documents and associated or ancillary documentation referred to above and/or required to give effect to the recommendations in this report.

**Broadway Green – Construction of Link Road Phase 2B**

**1 Background**

- 1.1 The Broadway Green development (previously known as the Foxdenton scheme) is being promoted by a joint venture partnership between Oldham Council, Grasscroft Property and Seddon Construction. The creation of the joint venture partnership and the terms of the partnership were approved by Cabinet on 16<sup>th</sup> December 2013.
- 1.2 The site has detailed planning consent for a new link road and the first two residential phases of the development. It also has outline consent for up to 700,000 sq. ft of employment space, a further 4 residential phases (providing a total of 500 new homes) and a new linear park (see masterplan at Appendix One).
- 1.3 The new link road connecting the A663 Broadway and the B6189 Foxdenton Lane will become adopted highway and therefore benefit the surrounding employment and residential area as well as the new development. It is not being constructed for the exclusive benefit of the Broadway Green development.

**2 Current Position**

- 2.1 The Broadway Green development started on site in June 2017.
- 2.2 Most of the link road from Foxdenton Lane has now been constructed. Redrow Homes are on site building the first residential phase (some of the properties having already been completed and occupied) and Countryside Properties have started the ground works on the second residential phase. In addition to this, the highway improvements at the Eaves Lane/Broadway/Foxdenton Lane junction have now been completed.
- 2.3 The next and final phase of the development is the construction of the new Broadway junction. This is a complex engineering operation, involving the removal of the disused Crosley Bridge which supports the A663 Broadway above and the subsequent infill of the remaining void. The A663 Broadway must remain open throughout the works.
- 2.4 When the new junction works have been completed and signed off, it will become adopted highway and therefore the responsibility of Highways England.
- 2.5 Prior to the start of the works, Highways England require a bond, which they will hold and utilize to cover the cost of any works if there is an issue which requires attention.
- 2.6 The cost of the insurance policy for the bond would be a cost to the scheme, which would be ultimately passed on to the joint venture.

**3 Options/Alternatives**

- 3.1 These are set out in the report in the restricted part of this agenda

**4 Consultation**

- 4.1 All Broadway Green Joint Venture Board Members including the Cabinet Member for Economy and Enterprise (Leader of the Council) and Cabinet Member for Finance and Corporate Services have been consulted on the proposal and are supportive of option 1

**5. Financial Implications**

- 
- 5.1 These are set out in the report in the restricted part of this agenda
6. **Legal Implications**
- 6.1 These are set out in the report in the restricted part of this agenda
7. **Co-operative Agenda**
- 7.1 The council is working co-operatively with its' joint venture partners to bring forward comprehensive development at Broadway Green. This will create a significant number of new homes and jobs, improve the local highway network, stimulate the local economy and improve the local environment.
- 8 **Human Resources Comments**
- 8.1 None.
- 9 **IT Implications**
- 9.1 None.
- 10 **Property Implications**
- 10.1 None.
- 11 **Procurement Implications**
- 11.1 None .
- 12 **Environmental and Health & Safety Implications**
- 12.1 None.
- 13 **Equality, community cohesion and crime implications**
- 13.1 None.
- 14 **Equality Impact Assessment Completed?**
- 14.1 No.
- 15 **Key Decision**
- 15.1 Yes
- 16 **Key Decision Reference**
- 16.1 ECEN-12-19.
- 17 **Background Papers**
- 17.1 None.
- 18 **Appendices**
- 18.1 Appendix One – Broadway Green masterplan.
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