

Appendices

Appendix 1

Section 1.1: Educational Consultant CV

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Competence

Educational Qualifications:

- * B.A. Honours, St Catherine's College, Oxford (Geography) 1978 – 81
- * PGCE Leicester University School of Education 1983/4
- * MEd University of London Institute of Education, Geography in Education 1992
- * NPQH (National Professional Qualification for Headship) London Leadership Centre 2000

Experience

- *Senior management school leadership experience of 20 years including 14 years as a headteacher in two schools
- *Extensive experience in every aspect of running schools – teaching and learning, standards and student outcomes, finance/premises, curriculum, student behaviour, pastoral/welfare/safeguarding, staffing recruitment, retention, capability, disciplinary issues, governance, academy status, managing change across organisations
- *Headteacher, Leiston High School later Alde Valley School, Suffolk from 2005 - 2014.
- *Major experience in partnership work with the following Suffolk High Schools: Bungay HS, Sir John Leman, Stradbroke BEC, Lowestoft College: led creation of £3.5 million North Suffolk Skills Centre in 2007, created major links with businesses in local area to support student learning and work – related curriculum.
- *Managed closure of two middle schools, expansion of existing upper school and rebranding to full 11-18 phase institution 2010 - 2013
- *Managed impact of local Free School 2010 – 2013, and initial work on transition to academy status.
- *Executive Headteacher role to support existing leadership to bring middle school out of Special Measures within 4 terms prior to closure in 2012 with OFSTED “Good” judgement for leadership and management.

Section 2: Education Consultant report on Pupil yield methodology

2.1 Pupil Yield is a critical determinant of school capacity

The draft Policy 12.29 proposes to meet future educational need based on an allocation of 800 homes using the SCC 0.25 pupil per dwellings 106 calculation. Providing a new school with absolute capacity for 210 places is taken as the justification for allocating c 800 homes rather than an accurate pupil yield methodology being applied to calculate the necessary allocation to justify a new school

This approach is both an inverse justification for a housing allocation and out of step with current national methodology. It is therefore thus not a sound basis for calculating pupil yield nor from which to extrapolate housing numbers for an allocation.

2.2 Pupil yield is apparently in decline in Suffolk Coastal area and yet the Policy does not reflect this

The proposal makes only brief evidential reference to a clear demographic decline to 2022/23 and associated fall in on-roll projections for two of the three schools. The 2017 ONS statistics for Suffolk Coastal population taken with segment 0-16 between 1997-2037 shows a projected decline from [around 20% to 15%](#). This is steeper than for the UK as a whole. It seems quite likely that the surplus places issue identified by the County Council in the three schools will continue to rise.

Policy 12.29 by implication requires a mix of flats for older people and starter flats for adults without children. These are usually one bed flats and neither tenure types yields 0.25 pupils per dwelling. One bed flats are zero rated in the SCC methodology. Thus the potential pool of catchment homes is significantly lower than 800, perhaps as low as 600. Taking the current assumption of 0.25 would thus yield 150 pupils. Given the projected falling roll this is financially unsustainable. However numbers are not the primary driver for yield (see next section).

An additional factor may be that the decision to locate the new school and early years facility (and it is not clear from the proposal if this is private wrap around care or a school nursery) within the development further reduces the available land for housing. This makes it more likely that flats and starter homes/downsizer homes will rise in proportion to that of affordable housing of 3 bedrooms or more.

It is worth noting that a condition of any Funding Agreement signed by the Department for Education (DfE) with the successful MAT that will run the new primary school/early years provision will stipulate that the site of the proposed school should be the most advantageous and appropriate for the school pupils and parents. The DfE will therefore have critical decision-making powers in this regard.

In general terms the school will follow the majority of houses as it would make no sense to build in isolation. Although Government wants to make best use of land and there is an argument for sharing the land with the high school this is arguably not the best place to locate an accessible school; there do seem to be two other sites in the town that could better serve primary need and these should be explored to determine which of them offers the better pupil yield in view of the locally identified need for large 3 and 4 bed affordable homes

2.3 SCC Pupil Yield methodology is flawed

The provision of a one form entry primary school and early years provision within the proposed development and its sustainability into the future depends critically upon the robustness and accuracy of Pupil Yield calculation that is used by the County Council.

The Council's current Topic Paper and methodology date from July 2015. The "Section 106 Developers Guide to Infrastructure Contributions in Suffolk" uses a Pupil Yield Factor of 0.25 for new build pupil quanta, drawn largely from the most recent census data (2011), and other data such as "*Area Health Authority statistics on live births and information from health visitors and doctor's practices. Further information includes pupil arrival rates and pupils from new housing developments*".

The Council's PPR is based on a combination of outdated historic census data, health data and other secondary data about housing developments in the public arena. It seems not to have been reviewed for several years and, critically, has not been subject to any rigorous review based **on external research** of the **actual pupil yield** from all new housing developments over a recent fixed time period.

One recent example from Suffolk illustrates the uncertainty of the generalised 0.25 pupil yield formula. In Red Lodge, Forest Heath, an initial 1200 home new build led to a new 1.5 form entry school (St Christopher's CEVAP School) which opened in 2012 with 315 places using the 0,25 PPR formula. By 2014 the school roll had grown so rapidly that the [OFSTED report of 2014](#) indicates in its opening statement that the leadership of the school were "overwhelmed" by the speed of pupil admissions which was unforeseen and was a significant factor in the overall judgement of "Inadequate".

Many other Local Authorities have commissioned recent and detailed external specialised research to ascertain what might be the most accurate and robust PPR given the actual pupil yield. This must take account of key factors such as, and especially:

- the age distribution of children
- housing type
- housing tenure.

In all such cases, detailed data has generated a higher PPR for early years and primary age children. Consequently, and very appositely given the current financial

challenges for Local Authorities, a higher and more accurate pupil yield is also a sounder basis for calculating Section 106 developer contributions.

For example, Somerset County Council's (see example with link below) new Section 106 contribution requests based on the new PPR of 0.32 and average cost per pupil based on actual project costs September 2016 – September 2018 is set at £17,074 compared to Suffolk CC £12,181 although this is stated to be index linked.

2.4 Recent examples of Local Authority external reviews of pupil yield assumptions with rural/semi – rural locations

Somerset County Council

After [research by Cognisant Research](#) the Council changed its PPR for primary age pupils from 0.20 to 0.32. In some housing developments the pupil yield turned out to be significantly higher than the Somerset County Council PPR. Some estates for example generated 45 pupils per 150 houses rather than the 30 estimated by the PPR.

Milton Keynes

Market Research by [Cognisant Research](#) indicated that in housing developments between 2012-2017 peak PPR was typically 0.45 for pre-school and 0.60 for primary age children, with considerably larger numbers of pre-school children at the start of the housing sales than had been expected which mirrors the situation in Somerset.

Central Bedfordshire Council

In July 2017, the Council, based on [research it commissioned](#) on pupil yield in recent housing developments, changed its pupil yield assumption from 1 form of entry per 750 homes to 1 form of entry from 500 homes. This is now the same PPR as is used in the neighbouring authorities of **Hertfordshire** and **Bedfordshire**.

Cambridgeshire County Council

Work carried out by [Cambridgeshire Council Research Group for September 2015](#) suggests that the general pupil yield calculator tended to underestimate the actual numbers of early years and primary age pupils against broad proposals for housing development based on a total quantum and aspirational statements. A new composite model was proposed to reflect key aspects such as size and tenure when **considering a detailed housing mix.** The final outcome of the research produced an outcome and proposal which is very close to that proposed by Northamptonshire.

Northamptonshire County Council

Research into actual pupil yield identified the crucial factors of size of housing and especially the percentage of affordable housing delivered which had a very substantial effect on the pupil numbers and viability of schools, most particularly in the more rural areas.

Table 14: Number of Children per hundred houses living in new developments taken from Northamptonshire County Council Population Forecasting Report 2014

Age	1 bed	2 bed	3 bed	4 bed
All tenures				
0-3	0	30	32	34
4-10	0	13	32	37
11-15	0	3	17	22
Social Housing				
0-3	0	52	63	92
4-10	0	19	83	58
11-15	0	4	41	100

2.5 Specific aspects affecting assumptions around pupil yield in all of the above

Age distribution effects on PPR

A one form entry school typically opens with an early years/nursery provision (where planned) and admission of Years 1 and 2 in year one of its operation, building up as the initial cohorts move through the school in successive years so that by year 5 it will have a full primary age population. The initial and critical factor for planners to take into account is the age distribution of the children forming the families who take up residence in the very first years. This is succinctly expressed by some experts in the field of pupil yield research:

However, the key issue to understand is the variations in age between the children and how this will impact on pupil place planning. It is not uncommon to see new dwellings yield twice the number of primary school children in Reception as at the top end of the school, in Year 6. If a 1,000 dwelling development generated 60 four-year-olds, this would suggest a two form of entry school, but the same development might only yield 30 eleven-year-olds, requiring only one form of entry. Over time, the estate is likely to normalise with the demand for places seen across the rest of the authority and understanding how long this process takes is key to planning how best to upscale provision and accommodate the initial bulge in demand ([Cognisant Research, March 2018](#))

Effects of tenure on the PPR

It is now well known that social rented housing generates more primary age pupils than market sale housing. In the example authorities quoted above, the PPR can be significantly higher in new builds where the percentage of affordable homes generated a PPR of 0.49 as against 0.27 for owner-occupied in Milton Keynes (see link above) for example. The work by all councils quoted above is based on the assumption that tenure is a critical factor for both raising and sustaining pupil yield over time.

The actual delivery of a policy compliant range and type of affordable homes in Policy 12.29 is therefore critical to the sustainability of the proposed primary school/early years provision given the demographic decline noted above.

Impact on Tenure of development with low levels of affordable housing

[Research](#) across a range of 8 rural local authorities by CPRE and Shelter in 2018 indicated that typically less than 50% of the planned affordable housing was delivered in the developments under study. The social equity implications of such a situation in rural areas where many are priced out of new housing not only reduces the likelihood of a primary school being sustainable in the short term but also reduces the sustainability of *all* primary schools within a locality. In the case of the development under consideration it means that any new primary school will likely take a considerable time and probably more than 5 years from start of development to achieve financial sustainability. That means at least 2029 assuming a start on site in 2024, but in this case if the declining demographic continues it may be considerably longer than this.

Finally, a major omission in the planning considerations and the policy is the increasing difficulty in recruitment and retention of teaching staff, especially in the primary sector and is already a major problem for schools in the Suffolk Coastal area. The lack of affordable housing is linked very strongly to the problems of being able to recruit key workers such as primary teachers in rural areas (see for example, [CPRE submission](#) to National Planning Policy Framework, April 2019).

Positive Development Viability is crucial to tenure mix

The Bailey Venning Viability Regulation 19 report attached to the Leave the Layers Alone submission shows the policy site 12,29 cannot afford the policy requirement percentage of affordable housing or indeed any affordable housing due to heavy infrastructure burdens.

The impact on primary pupil yield of any reduction from policy is significant. The social mix of the pupil population is much narrower. Where there are pockets of deprivation such as within the Saxmundham locality this has implications for the life chances and opportunities for lower income families seeking secure housing and a permanent primary school place for their children.

2.6 Conclusions regarding proposed development of a one form entry primary school/early years unit

1. The evidence strongly suggests that the current Suffolk County Council generalised metric for forecasting pupil yield is a blunt and unhelpful tool to forecast yield.
2. The argument for 800 homes justifying a school is not supported by the evidence. Based on other council's experiences pupil yield is directly influenced by the key factor of tenure not necessarily numbers of homes, see point 6 below
3. Suffolk County Council should review its own pupil yield calculations by commissioning external research to ascertain detailed statistics on all new build developments over the last 5 years. This would generate a robust data set around which to review its PPR for any future development. Information about detailed housing mix from the proposal would enable more accurate forecasting of actual pupil yield.

4. The pupil yield example of Northamptonshire Council which incorporates the critical factors of tenure and size of property suggests a more useful working model than a simple single (blunt) metric such as the current Suffolk County Council PPR.
5. If the Council decides not to undertake such research, a modest increase in the PPR in line with some of the neighbouring local authorities (e.g. Essex 0.30) and those quoted above will potentially generate more of the Section 106 funding per dwelling required to secure the creation of a new one form entry primary school. However, in the absence of a robust data set, a lack of forecasts for sustained yield over the critical first five years of the school's existence is a major risk factor.
6. The evidence of other local authorities suggests a modest increase of the PPR to 0.30 could reduce the size of the proposed housing development to perhaps 500 houses and still enable the school to be sustainable at 90% capacity
7. This is dependent on viability and tenure thus the policy site cannot be considered sound.
8. The policy needs major modification to assist both school sustainability and teacher retention over other requirements for garden city principles eg allotments and older people's accommodation
9. The proportion of affordable housing vis-a-vis market housing is critical to ensure that lower income families with young children can be encouraged to seek residence so that the new school is both viable in its first 5 years and sustainable in the longer term.
10. There are some significant risks to school roll sustainability if the affordability definition is not precisely framed in terms of dwelling size and tenure. The rather generalised conception of affordability in the proposed development will not assist in this regard.

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