

Supplementary Planning Document

**Draft Financial Contributions
for Educational Provision**

Consultation September 2024



Track Changes Information

We have previously consulted on changes to the adopted version of the Financial Contributions for Educational Provision (Formerly known as Financial Contributions for Schools), in Summer 2023. These are shown in red and underlined or struck through. Following this consultation further changes have been made to take account of comments made by the Department for Education. These additional changes are shown as struck through or underlined text and highlighted turquoise. We are now seeking your views on these additional changes.

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1. About this guidance

- 1.0** The National Planning Policy Framework (NPPF) indicates that Local Development Documents form the framework for making decisions on applications for planning permission. Decisions have to be taken in accordance with the development plan unless other material considerations indicate otherwise. NPPF advises that a local planning authority may prepare Supplementary Planning Documents to provide greater detail on the policies in its Local Plan. Supplementary Planning Documents (SPDs) are a 'material' consideration when planning applications are decided.
- 4.4** As required by the Planning and Compulsory Purchase Act 2004 we have prepared a Statement of Community Involvement (SCI) which sets out how we will involve the community in preparing our Local Plan and consulting on planning applications. This SPD has been prepared in consultation with the Council's Education Service. In accordance with the SCI we have involved people who may be interested in this SPD Supplementary Planning Document and asked them for their comments. We have produced a consultation statement which summarises all the comments people made to us and our response. This is available on request.

2. Introduction

- 2.1** This document supplements Local Planning Policy I1 Infrastructure and Planning Obligations which states:

Policy I1 Infrastructure and Planning Obligations

Development must be supported by appropriate physical, social, economic and communications infrastructure, including provision for broadband.

Development must contribute as necessary to meet all on and off site infrastructure requirements to enable development to take place satisfactorily.

Where the necessary provision is not made directly by the developer, contributions will be secured through planning obligations.

Where appropriate, pooled contributions will be used to facilitate delivery of the necessary infrastructure.

- 2.2** New houses give rise to the need for additional educational provision, facilities and places, including early years and special educational needs and disabilities provision. ~~school places.~~ However, educational settings ~~schools are sometimes full and do not always have spare~~ provision, places and adequate facilities for new pupils.
- 2.3** When considering planning applications for new homes, the availability of pupil places in local schools is a material consideration. The National Planning Policy Framework (NPPF) requires planning authorities to assess the capacity of schools when deciding planning applications. In doing so it states that "Local planning authorities should take a proactive, positive and collaborative approach to meeting this requirement, and to development that

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will widen choice in education [giving] great weight to the need to create, expand or alter schools through the preparation of plans and decisions on applications... (NPPF para 95). NPPF also underlines the importance of planning positively for the provision and use of community uses, shared spaces and other local services (para 93), which supports the need to provide for early years and SEND provision within the community. National Planning Practice Guidance (NPPG) is also clear that developer contributions towards additional capacity may be required, and that requirements should include all school phases from 0-19 as well as special educational needs planning obligations (paragraph 8).

- 2.4** This Supplementary Planning Document explains how the Council will implement the NPPF, NPPG and Local Plan Policy I1 when considering the capacity of local educational provision, facilities and places of pupil places in local schools, and how we will assess if contributions are required to ensure these places available are in buildings of a suitable condition.

Planning applications for new homes will be refused unless schools educational settings already have sufficient capacity to accommodate new pupils from the development or enough extra places can be created to accommodate them.

- 2.5** Developers can make a financial contribution to the Council to provide physical space needed to accommodate new pupil places at the local early years or school setting that would serve the new housing development. This space could be either classroom or other accommodation such as a new hall or canteen, or sensory area depending on what is needed to ~~permit~~ facilitate the intake of new children pupils. This allows development to go ahead and means that pupils children can attend an educational setting school local to where they live.
- 2.6** Alternatively, a developer may wish to directly build an extension to a local educational setting school to provide the new space needed. In this case special arrangements will need to be agreed with the Council and set out in a planning obligation legal agreement.
- 2.7** However, it may sometimes be the case that schools are full and there is no possibility of providing extra capacity. For example, there may not be enough space on the site to locate a new classroom. In such circumstances planning permission for new homes will be refused.
- 2.8** Local Plan policy I1 states that development must be supported by 'appropriate' infrastructure. Where there are places available but there are issues with the condition of the school/schools, contributions will be sought to carry out necessary works to ensure school places can be provided that are of a standard that can be considered 'appropriate'.

3. When a financial contribution will be needed

- 3.1** A financial contribution will be needed for planning applications for housing developments where:-
- The scheme provides 10 or more homes; and
 - There is insufficient capacity in schools; or
 - There is insufficient capacity in early years settings; or
 - There is a need for contributions to ensure schools are in an appropriate condition.

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3.2 When assessing the need for a contribution the Council will consider:-

1. How many pupils a development will generate; and
2. The available capacity (spaces and associated facilities) at schools in the school planning area within which the development is located; and
3. The available capacity (spaces and associated facilities) for SEND provision in the school planning area within which the development is located; and
4. The available capacity (spaces and associated facilities) at early years settings in the school planning area within which the development is located; and
5. The condition of schools and early years settings in the school planning area within which the development is located, in particular whether any work is required to ensure the school is fit for purpose and can be considered to be "appropriate" infrastructure in line with Local Plan policy I1.

4. Number of pupils generated

4.1 The number of pupils a development will bring is calculated as follows shown in table 1 below:-

Table 1: Pupil yield calculation data

<u>School phase</u>	<u>Early years</u>	<u>Primary</u>	<u>Secondary</u>	<u>Post-16</u>	<u>Special schools/alternative provision</u>
<u>Number of pupils per 100 homes</u>	<u>8</u>	<u>32</u>	<u>15</u>	<u>5</u>	<u>1</u>

- ~~Primary school pupils – 21~~ 27 pupils per 100 homes.
- ~~Secondary school pupils – 15~~ 11 pupils per 100 homes.

4.2 These figures are taken from the Department for Education Pupil Yield Data Dashboard¹ published in August 2023. have been arrived at using information from the school census 2015-2023. The figures will be reviewed periodically through the Local Plan Monitoring Report to ensure they remain relevant.

4.3 This calculation will be based on the number of homes included in the detailed planning application. Any increase or reduction in this number through revised applications will result in the required contribution being revised accordingly. However, as described below, the principle of a contribution being needed will be established at any outline planning stage.

4.4 When there are concurrent applications in the same area, we need to consider the full impact on schools from all those applications together (rather than considering

¹ The Department for Education Pupil Yield Data Dashboard shows pupil yield from housing developments across England. It was first published 9 August 2023 and is available online at <https://department-for-education.shinyapps.io/pupil-yields-dashboard/>

applications individually).

5. **Early years, post-16 and special educational needs and disabilities (SEND) provision**

5.1 ~~To ensure the cumulative impacts of this Supplementary Planning Document do not undermine the ability to meet the full suite of policy requirements, we will not expect a contribution for early years or SEND provision over and above the contributions sought for primary and secondary provision. Instead, should projections show that adequate primary and secondary spaces are expected to be available for the remainder of the plan period within the relevant school place planning area, an assessment will then be undertaken to establish if there is a need for early years or SEND provision, which would help cater for demand arising from future occupants of the application site. In such a scenario, the contribution that would ordinarily have been sought for primary and or secondary provision would instead be directed towards the necessary early years and/or SEND provision.~~

5.2 In determining the impact of a development on educational provision the Council will assess the need and capacity for all school phases from 0-19 as well as special educational needs, in line with Government policy. Whilst the number of SEND pupil places that new developments typically generate is lower than the number of mainstream places, it is recognised that the costs associated with providing those places is higher. Section 7 below explains how financial contributions will be calculated. In circumstances where the cumulative costs of meeting all policy requirements is likely to make a development unviable, the Council will consider where the need is greatest and prioritise developer contributions accordingly.

5.3 Post-16 provision in the borough is largely through independent bodies, with the exception of Penistone Grammar School, the only local authority maintained facility. Contributions for post-16 places will only be sought when a new development falls within the south west secondary school planning area.

6. **When a financial contribution will not be needed**

6.1 The methodology for calculating the number of pupils a development will bring accounts for a standard housing mix, ~~therefore the numbers~~ therefore the numbers arrived at using this methodology will be applied. Evidence will be required from developers if they are seeking to make a case that the particular mix will yield less need for school places.

6.2 The following types of housing development will not be required to make a financial contribution to schools in any circumstances:-

- Single bedroom homes;
- Homes specifically designed for elderly people;
- Sheltered accommodation; and
- Student accommodation.

6.3 These types of homes are usually occupied by people who are unlikely to have dependent children of school age living with them. The need for additional school places is therefore

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also unlikely and so a financial contribution would not be necessary.

- 6.4** Where a development scheme includes both 'family' housing and any of the house types listed above, a financial contribution will only be required in relation to the 'family' housing element. Homes that fall into any of the above categories will be excluded from the financial contribution calculations.

7. How the amount of financial contribution will be calculated

7.1 For the cost of school places the Government recommends² using regional cost data figures from the latest local authority school places Scorecard as a basis of the cost per pupil place. For Yorkshire and The Humber, the cost per place of a permanent school expansion is £17,677 for primary schools and £24,312 for secondary schools (as at 2022). The latest scorecard figure per place for primary schools in Barnsley is ~~£18,832~~ £16,202, and for secondary schools is ~~£18,625~~ (as at 2021-2017). In accordance with the guidance we will assume that the per pupil cost of early years provision is assumed to be the same as for a primary school and post-16 provision the same as for a secondary school.

7.2 When calculating the costs associated with SEND provision we must take into account that special schools require more space per pupil than mainstream schools. The costs for special or alternative provision will therefore be calculated at four times the cost of mainstream places, consistent with the additional space requirements in Building Bulletin 104 and government guidance³.

7.3 For secondary school places we have looked at costs incurred on a recent secondary school development. The average cost per place is £16,056.

7.4 ~~Both of~~ these figures are rounded to the nearest ~~thousand~~ five hundred, therefore where:-

- Only primary school places are needed, a contribution of £16,000 ~~£19,000~~ £17,500 must be made for each place;
- Only early years places are needed, a contribution of £17,500 must be made for each place;
- Only secondary school places are needed, a contribution of £16,000 ~~£18,500~~ £24,500 must be made for each place;
- Only post-16 places are needed, a contribution of £24,500 must be made for each place;
- ~~Both primary and secondary school places are needed, contributions of £16,000 ~~£19,000~~ must be made for each primary place and of £16,000 ~~£18,500~~ for each secondary place.~~
- A combination of school phases places is needed, a contribution for each phase must be made. For example, where early years, primary, secondary and post-16 places are needed, contributions of £17,500 must be made for each early years and primary place; and of £24,500 for each secondary and post-16 place.
- Where SEND places are needed, contributions will be calculated at four times the cost of the respective mainstream provision.

² [Securing developer contributions for education \(Department for Education, 2023\)](#)

³ See footnote 2 above.

- 7.5** These figures will be reviewed periodically through the Local Plan Monitoring Report to ensure they remain relevant and responsive to the costs of school places and updated Local Authority school places scorecards.
- 7.6** This is the calculation that will apply in the majority of cases. However, there may be cases where a different approach is needed, depending on what factors are affecting the capacity of the school. For example, if a whole new school is needed and the developer does not want to build this directly, then the contributions required may be different from the figure arrived at using this calculation.
- 7.7** The starting point for assessing if contributions are required to address issues with the condition of schools will be School Condition Reports carried out by the ~~Education and Skills Funding Agency~~ **Councils Property and Assets Team, Department for Education and liaison with individual schools**. For schools where these are not in place, we will outside of Local Authority control we rely on Academies and Trusts providing us with comparable information. The amount will be determined based on cost estimates of works that may be required to a particular school or schools in the locality.

8. How and when the financial contribution will be secured

- 8.1** The financial contribution will be secured through a planning obligation. This is allowed by section 106 of the Town and Country Planning Act 1990, as amended by the Community Infrastructure Levy Regulations 2010.
- 8.2** Planning applications may be resolved to be granted, either by officers through delegated powers or by the Planning Regulatory Board, subject to the completion of a planning obligation providing for a financial contribution to educational provision school places. The obligation must be signed before planning permission will be granted and the ~~D~~decision Notice released.
- 8.3** The Planning obligation must specify the amount of the contribution and when it will be paid. The Council will use this guidance note to calculate the amount of contribution required in each case. For outline planning applications the amount of the contribution will not be known. However, an obligation will be required at the outline stage that links the amount of contribution to be made to the calculation formula in this advice note.
- 8.4** The Council will require contributions to be made quickly once building has started on site so that the extra school places and/or improvements to can be provided in time for the arrival of new children pupils. The precise timing will be set out in the obligation.

9. How and when the financial contribution will be spent

- 9.1** The planning obligation will specify that the contribution will be spent on the provision of and/or improvements to educational provision. ~~what the contribution will be spent on.~~ This must will relate to creating the additional educational provision, facilities and school or early years places needed to accommodate the new development or ensuring a school setting is in an appropriate condition to accept pupils. This will include spaces and places

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to address SEND provision as required. This means that it will only be used in respect of educational settings schools local to the new homes built, either to increase capacity or to carry out improvement works required to ensure the condition of the school is appropriate. It will be spent on creating new classroom space or providing other new accommodation where this limits the capacity of the setting school, or on works required to improve its condition.

9.2 Once collected, the money will be held in an Education Service account specifically set aside for financial contributions to schools. It will then be spent on the works identified in the planning obligation as soon as possible. The obligation will include a date by which the contribution must have been spent. This will normally be 10 years from the date the contribution was received by the Council. If it has not been spent by the specified time, then the remaining amount will be returned, including the Council's standard rate of interest.

10. How we determine if a school an educational setting is local to the development

10.1 The starting point for deciding whether a contributions to educational provision is schools are required arising from a development will be to use the broad school planning areas. There are five Barnsley has twelve thirteen school planning areas for primary schools and four for secondary schools. These are set out below. The primary school planning areas will also be used to determine the need for early years provision. Post-16 provision will only be sought in the south west secondary school planning area as set out in paragraph 5.2.

10.2 The table below shows which school planning area(s) cover Urban Barnsley and the Principal Town settlements. Confirmation of school planning areas for planning applications falling outside the settlements listed below can be requested by emailing schoolorg@barnsley.gov.uk Appendix 1 provides more detail on which secondary schools the primary schools generally transfer to within these school planning areas.

Table 2: School planning areas for Urban Barnsley and the Principal Towns

<u>Settlement (Sub-regional Town and Principal Towns)</u>	<u>Primary School Planning Areas</u>	<u>Secondary School Planning Areas</u>
<u>Urban Barnsley - Carlton</u>	<u>PRI-PA02</u>	<u>Central</u>
<u>Urban Barnsley – Darton, Athersley North, Athersley South, New Lodge, Mapplewell, Kexborough, Staincross</u>	<u>PRI-PA01</u>	<u>Central</u>
<u>Urban Barnsley - Barugh Green, Wilthorpe, Gawber, Higham, Pogmoor</u>	<u>PRI-PA04</u>	<u>Central</u>
<u>Urban Barnsley – Dodworth, Gilroyd, and Barnsley Town Centre</u>	<u>PRI-PA05</u>	<u>Central</u>
<u>Urban Barnsley – Lundwood, Monk Bretton, Hoyle Mill</u>	<u>PRI-PA06</u>	<u>Central</u>

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<u>Urban Barnsley – Worsbrough Common, Worsbrough Dale, Worsbrough, Ardsley, Kendray, Stairfoot, Ward Green</u>	<u>PRI-PA07</u>	<u>Central</u>
<u>Cudworth - including Grimethorpe and Shafton</u>	<u>PRI-PA03</u>	<u>North East</u>
<u>Royston</u>	<u>PRI-PA02</u>	<u>North East</u>
<u>Goldthorpe (Dearne Towns) - Goldthorpe and Thurnscoe</u>	<u>PRI-PA09</u>	<u>South East</u>
<u>Goldthorpe (Dearne Towns) – Highgate and Bolton on Dearne</u>	<u>PRI-PA10</u>	<u>South East</u>
<u>Wombwell (including Darfield)</u>	<u>PRI-PA08</u>	<u>South East</u>
<u>Hoyland (including Birdwell, Blacker Hill, Elsecar, Hemingfield and Jump)</u>	<u>PRI-PA13</u>	<u>South West</u>
<u>Penistone (including Cubley and Springvale)</u>	<u>PRI-PA11</u>	<u>South West</u>

Settlement	School Planning Area - Primary Schools	School Planning Area - Secondary Schools
Urban Barnsley	Central	Central
Urban Barnsley – Darton and Dodworth	North	Central
Cudworth – including Grimethorpe and Shafton	North East	North East
Royston	North East	North East
Dearne – including Goldthorpe, Thurnscoe and Bolton on Dearne	South East	South East
Wombwell – including Darfield	South East	South East
Hoyland – including Birdwell, Blacker Hill, Elsecar, Hemingfield and Jump	South West	South West
Penistone – including Cubley and Springvale	South West	South West

10.3 Given the number of SEND places required are generally a small proportion of the overall mainstream school provision, and the complex nature of provision required, local need for SEND provision is determined on a boroughwide basis. Provision of facilities may also be provided in collaboration with adjoining authorities and may be physically located outside of the Barnsley borough.

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The following table lists those primary schools which generally constitute 5% or more of the total intake of a particular secondary school. This is provided to give further detail on the school planning areas:

Secondary School	Transferring Primary Schools
Barnsley Academy	Hunningley Oakhill Worsbrough Bank End The Forest The Mill
Darton College	Darton Wellgate Wilthorpe Kexborough Mapplewell Barugh Green
Holy Trinity 3-16 Secondary Phase	Holy Trinity Primary Phase Transfers Royston St John's Holyrood Carlton
Horizon Community College	Joseph Locke Ward Green Summer Lane Shawlands Wilthorpe St Mary's CE Keresforth Burton Road Worsbrough Common Gawber Doncaster Road
Kirk Balk Community college	Hoyland Common Greenfield Birdwell West Meadows Jump Tankersley St Helen's Catholic

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Secondary School	Transferring Primary Schools
	The Ellis
Netherwood ALC	High View Kings Oak Wombwell Park Street Upperwood The Darfield Academy All Saints Sandhill
Outwood Academy Carlton	Athersley South Athersley North Carlton Parkside St Helen's Primary Academy Laithes Primary Summer Fields Meadstead
Outwood Academy Shafton	Littleworth Grange PLC Cudworth Churchfield Cherry Dale Milefield Birkwood Shafton Ladywood Brierley CE
Penistone Grammar ALC	Penistone St John's Springvale Silkstone Thurgoland CE Silkstone Common Oxspring Cawthorne CE
The Dearne ALC	The Hill Garrfield Highgate Lacewood Gooseacre Heather Garth Dearne Goldthorpe