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3rd March 2025

EFM EDUCATION LANDSCAPE REVIEW LAND IN SPENCER'S WOOD, WOKINGHAM

This document is an Education Landscape Assessment in relation to a development of between 420 dwellings at the site discussed above and shown below in Map 1:



Map 1: Approximate Development Outline

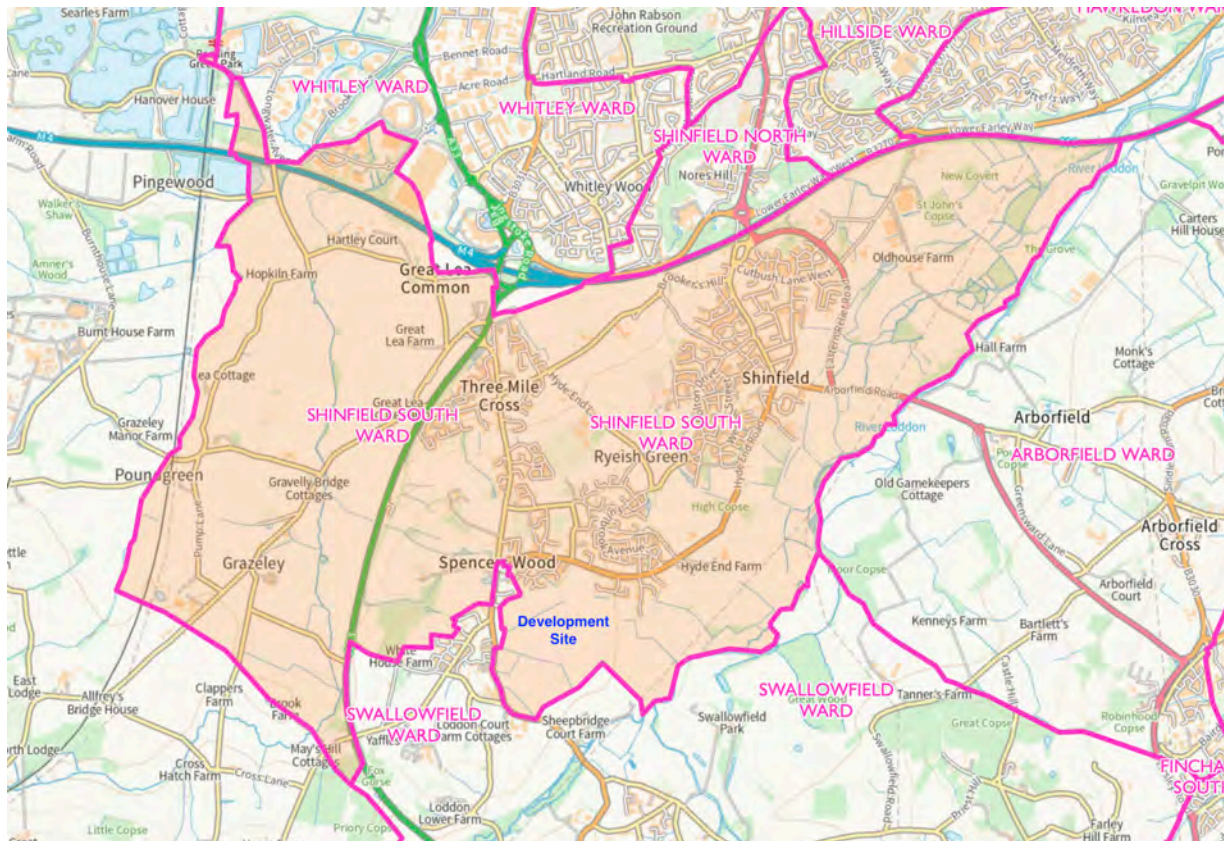
The development description is as follows:

Outline planning permission is sought with all matters reserved for future determination, save for the means of access via Basingstoke Road, for: up to 420 dwellings (Use Class C3), an 80 bed care home (Use Class C2), 1ha of employment land (Use Class E(g), primary school (Use

Class F1), local centre (Use Classes E(a), (b), (c), (f)), GP Surgery (Use Class E(e)), sports pitch and changing facility, public open space, SANG provision and associated infrastructure.

This development is located within the Wokingham Borough Council (“WBC”) administrative area. WBC is a unitary authority, being a district council, which also performs the functions of a county council, meaning that WBC is both Local Planning and Education Authority.

The development is located within the Shinfield South Ward (“the Ward”). The Ward boundary and the development’s location within the Ward can be seen in the Map below:



Map 2: Ward Boundary and development’s location within the Ward

WBC have previously stated during pre-application discussions in 2018 the following:

Schools

A two form entry primary school is proposed on the site. The Strategy and Commissioning Team have advised that the local primary schools do not have capacity to meet the needs generated by this development. This is a very significant development proposal and at 600 family homes this would generate between 20 and 30 children per year group, potentially filling a one form entry primary school. Further discussions with Strategy and Commissioning would be required with regard to the proposed size and intake of the primary school.

It should be noted that 20-30 pupils per Year Groups is child yield of between 0.23 pupils per dwelling, and 0.35 pupils per dwelling. This is discussed further below. This Report will scrutinise the above assessment in order to ascertain whether new Primary School provision is likely to be required on site, based on the previously discussed range of development outcomes.

This document will undertake the following tasks:

- It will look at the child yield multipliers utilised by WBC in order to ensure that they are appropriate for the area;
- It will look at the planning obligation cost multipliers to ensure they are in line with the national averages and Department for Education's ("DfE") Guidance, Securing Education Planning Obligations (August 2023) which is endorsed by MHCLG PPG Paragraphs: 007 Ref ID: 23b-007-20190315 and 008 Ref ID: 23b-008-20190315; and
- Finally, it will look at the Education landscape, in order to establish whether planning obligations are appropriate and required under the CIL Regulations, specifically the tests of CIL Regulation 122.

Generating school aged children may require the addition of new school places. The necessity requirement dictates that there must be the equivalent child yield increase of the Capacity and Admission Number of a school that would serve the development if there is insufficient capacity for those children. The Capacity of a school is published differently depending upon its type. The Admission Number is the number of places for each age group. For a maintained school (maintained by the local education and children's services authority) it is the Net Capacity, and for an Academy/Free School it is set out in the Funding Agreement with the

Education Secretary of State. This obligation on the Council should be stipulated in the Section 106 if planning obligations are agreed. “Improving” educational facilities is not appropriate use of planning obligations. Pre-existing deficits, upgrades and maintenance issues are funded from different sources.

WBC operates a Community Infrastructure Levy (“CIL”). Funds from this levy have contributed towards Education projects, as have Section 106 planning obligations. Discussions related to mitigation should include the potential for CIL to fund new provision; especially in relation to Secondary School expansions.

To first discuss the child yield multipliers utilised by WBC:

Child Yield

WBC has detailed a child yield of 0.05 zero to four year old children per Year Group, and 0.03 five to ten year old children per Year Group. This was outlined in the Primary and Secondary School Roll Projections Cabinet Paper in July 2019.

On that basis, the Early Years child yield is in the region of 0.1 pupils per dwelling, and 0.21 Primary School aged pupils per dwelling. The Secondary child yield is expected to be 0.15 for Secondary, and 0.03 for Sixth Form.

On the basis of these figures, the child yield of 420 dwellings is expected to be the following:

Education Phase	420 dwellings
Early Years	64
Primary Education	147 (0.7FE)
Secondary Education	63 (0.42FE)
Sixth Form	13

Table 1: Child Yields of WBC

These figures do not factor in any non-child-generating dwellings such as one-bedroom dwellings, or elderly residential units, so can be considered a worst-case scenario. WBC’s multipliers are broadly consistent with the averages of most EA’s across the UK, and are not excessive.

The statement from WBC detailed previously stipulates a top-end of 0.35 pupils per dwelling. When comparing this to the figures in the DfE's child yield study (August 2023) WBC is seeing the following yields:

Year	LocalAuthority	EducationPhase	EducationType	TenureType	HousingType	NumberOfBedrooms	NumberOfPupils	NumberOf...	PupilYield
2021/22	Wokingham	Early Years	Mainstream	All	All	All	378	8159	0.046329207
2021/22	Wokingham	Post-16	Mainstream	All	All	All	177	8159	0.021693835
2021/22	Wokingham	Primary	Mainstream	All	All	All	2539	8159	0.311190097
2021/22	Wokingham	Secondary	Mainstream	All	All	All	1147	8159	0.140580954

Table 2: DfE Child Yields

What the above demonstrates is that Secondary is broadly in line with actual child yields. From a Primary perspective, the DfE details an average yield of 0.31. A yield in that range is not excessive.

Turning now to the cost multipliers utilised by WBC:

Planning Obligations

The latest DfE Guidance Document states:

We advise that you base the assumed cost of mainstream school places on the relevant average regional costs published in the DfE school places scorecard. This allows you to differentiate between the average per pupil costs of a new school, permanent expansion or temporary expansion, ensuring developer contributions are fairly and reasonably related in scale and kind to the development. You should adjust the regional average to account for inflation since the latest scorecard base date.

In addition, consider uplifting rates to reflect the costs associated with achieving the sort of sustainability and design standards set out in the department's updated School Output Specification 202112 (or a future update which is relevant to the timing of a project). The department has uplifted Basic Need grant funding by around 10% to support local authorities meet the costs associated with achieving these sorts of standards. This percentage may be a useful basis for an uplift to developer contributions, though current local planning context such as additional climate change, environmental or design policy requirements may justify an alternative uplift.

The latest scorecard in the public domain was published in June 2024, and covers the period up to mid-2023. This details the following averages for school build costs per pupil:

This is the latest data

Cost per additional school place for 'Costs of Additional School Places' for New schools, Permanent expansions, Primary, Secondary and Temporary expansions in England for 2023

Move and reorder table headers

	Primary	Secondary
New schools	£23,865	£28,912
Permanent expansions	£19,989	£27,492
Temporary expansions	£9,450	£10,609

Table 3: Average Costs per Pupil Place – DfE Scorecard

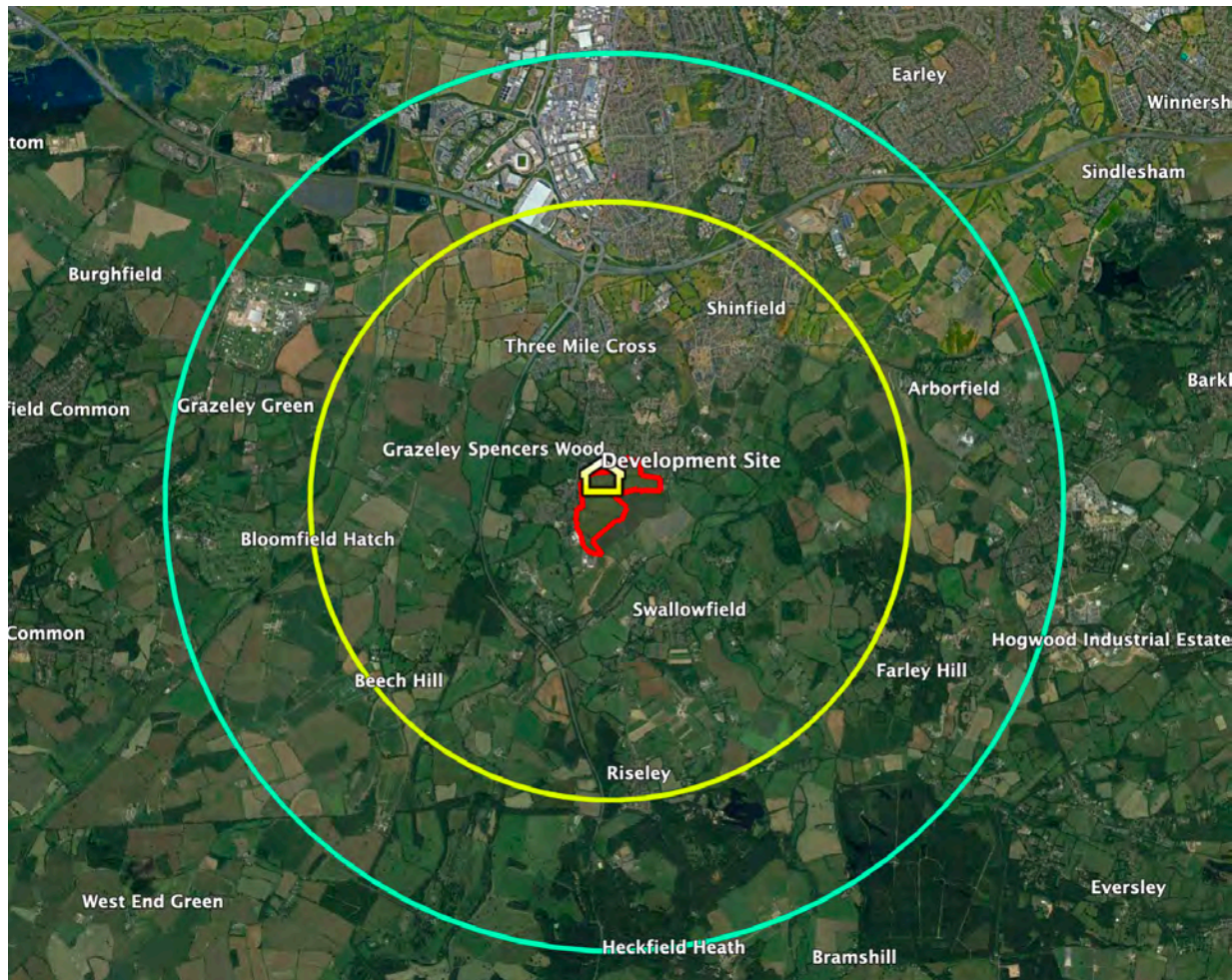
Providing WBC are not requesting funding that exceeds these figures, the contribution multipliers can be accepted.

This Report will now look at the Education landscape to establish whether new infrastructure provision is likely to be required:

Education

In our assessment, we consider all Primary Schools within a 2-mile walking distance¹, and all Secondary Schools that lie within a 3-mile walking distance of the development. The 2 and 3-mile criteria are the distances prescribed in the Education Act beyond which local authorities are required to provide/fund transport where the nearest available school is further away.

¹ Distances have been calculated based upon coordinates near to the development. Once the development is built out, some parts of the site will be further/closer than shown.



Map 3: Two- and Three-Mile Radius around the Development Site

The authority is required to make pupil forecasts to the Department for Education on a year of age basis by 'school planning area' and identify each school in the cluster and its capacity. The forecasts cover the period for which birth data is available. Forecasts covered by Section 106 agreements submitted separately to avoid double funding. For Primary School age pupils, the current published data runs to 2027/28 and for Secondary School aged pupils 2029/30. These are known as the School Capacity ("SCAP") returns. This is how Government allocates its funding for additional school places that are its responsibility to provide.

Schools should be operationally full to meet the financial audit requirement for best value from public assets. This is demonstrative of a properly functioning school system. School funding is predicated on the number of pupils that are on a school's roll, so it is in the best interest of schools to maximise intake within their capacity. Accordingly, many schools take from a wide catchment area and some enrol over capacity.

The statutory rules on enrolment are that whilst schools may have a catchment area and ordered criteria for admissions, the rules only apply if the school is oversubscribed. Otherwise, whoever applies is admitted irrespective of where they live. This is known as 'More Open Enrolment'. It fosters parental choice of school.

The overarching duty to provide sufficient schools and school places rests with Central Government (Education Act 1996 Section 11). The duty excludes those otherwise provided for (private education, home schooling, **those in new housing with a Section 106/CIL in place** (my emphasis)).

The education authority's duty in such matters is to secure sufficient schools and school places for their area (Education Act 1996 Section 14). 'For their area':

The duties of a [local] education authority do not require the authority to secure the provision of schools for pupils from outside the area of the authority, even though it may be convenient for a pupil to attend a school in an area other than that in which he lives.

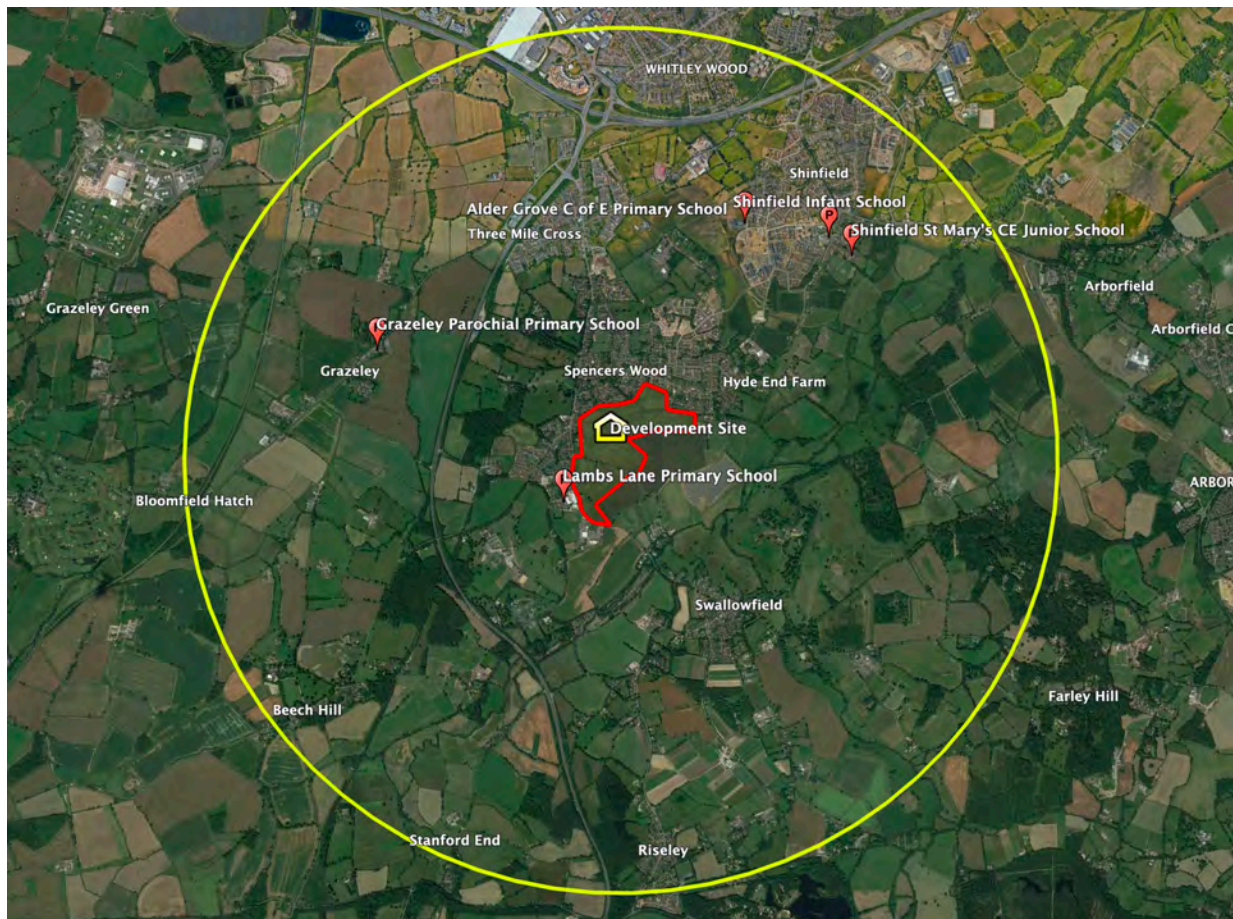
Within the State-funded school sector there are Community Schools funded by the local authority, and there are other providers than the local authority; these are Academies, Free Schools, the Voluntary Sector (e.g. Church Schools) and Foundation Schools. Academies and Free Schools are funded directly by Central Government: Church Schools and Foundation Schools are maintained by the local authority.

The provision of school places, where there is a shortfall, is made via a funding stream from the Department for Education ("DfE") known as Basic Need. Basic Need funding is allocated as 'a number of pupil places times a unit cost', differentiated by school phase and local building costs. Allocations are made on the basis of projected shortfalls in local School Planning Areas against current pupil numbers and the actual numbers of school places in that Planning Area. Each planning area is treated as a discrete area and shortfalls met through the allocation of resources. A surplus in one school planning area is not offset against another with a shortfall. In this case, providing housing in the South West Neighbourhood Primary Planning Area (for whatever planning reason) will be reflected in the forecasts for the South West Neighbourhood Primary Planning Area, and nowhere else.

Primary Education

There are five independent, state funded, non-selective schools accommodating Primary School aged children within a two-mile radius of the development site. Of these schools, only four are likely to be considered to be within an “acceptable walking distance” of the development site, and it is questionable as to whether WBC will consider Shinfield walkable via a “safe” walking route. In which case, only one school will be considered appropriate capacity for this development.

The schools in relation to the development site can be seen in the Map below:



Map 4: Schools within a two-mile radius around the development site

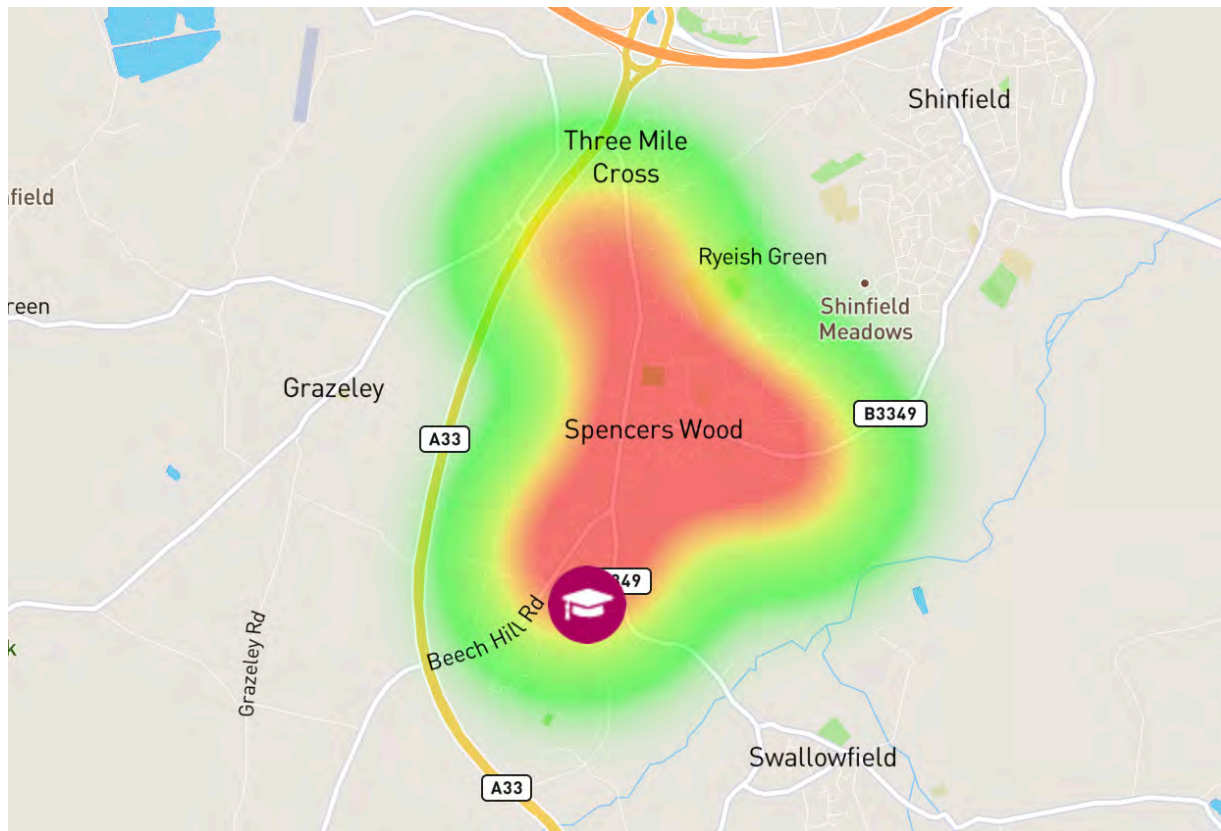
The latest school roll data in the public domain can be seen in the Table below:

Primary School Name	Postcode	LA Name	Distance (miles)	Capacity	PAN	NoR	Yr R	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	Yr 6
Lambs Lane Primary School	RG7 1JB	Wokingham	0.3	210	30	202	29	29	28	27	32	28	29
Alder Grove C of E Primary School	RG2 9RA	Wokingham	1.3	420	60	236	60	60	61	55	0	0	0
Shinfield Infant/Junior School	RG2 9EH	Wokingham	1.6	630	90	626	89	89	90	89	90	91	88
TOTAL				1,260	180	1,064	178	178	179	171	122	119	117
Surplus							2	2	1	9	-2	1	3
Available Surplus %							1%	1%	1%	5%	-1%	1%	2%

Table 4: School Roll Data (January 2024)
PAN = Planned Admission Number; NoR = Number on Roll

The only school that demonstrably serves Spencer's Wood is Lambs Lane Primary School. This is a 1FE Primary School that as of the previous academic year was completely full.

The school accommodates pupils from across Spencer's Wood, as shown in the Map below:



Map 5: Lambs Lane Primary School Catchment Area Heat Map

The school is located on a site of circa 0.55ha, and is completely landlocked. A standard 1FE school is usually on a site of around 1ha. Expansion of this school on the existing site is likely to be considered insurmountable on its existing site:



Map 6: Lambs Lane Primary School (via Land Registry)

On the basis of this development generating less than 1FE's worth of children, and Lambs Lane Primary School being unable to expand on its existing site (and the very close distance between Lambs Lane Primary School and this development) the most obvious solution to allow Lamb's Lane Primary to grow would be to relocate it on to this development site. This was put to WBC in a meeting on Education provision, where it was confirmed that this would be the favoured option.

The second closest school to the development – Alder Grove Primary School – is a new school that opened in September 2020, and is phasing its opening. The school is currently full in every Year Group it is offering places. It will be fully open in September 2027. This was required due to the growing number of children in the area.

The final schools within a two-mile walking distance are an Infant/Junior School for Shinfield students known as Shinfield Infant/Junior Schools. These are large 3FE facilities that are currently completely full. No catchment area data is available for these schools because Alder grove is too new, and Shinfield Infant/Junior School recently became Academies.

To summarise the above: all of the schools within a two-mile walking distance of the proposed new development are completely full. There is currently no spare capacity for any pupils coming forward on this development site.

The four schools discussed in Table 4 are grouped with three additional schools to form the South West Neighbourhood Primary Planning Area. The schools have a combined capacity of 2,415 pupil places:

Primary Planning Area	Secondary Planning Area	School Name	Time Period	Primary Capacity
8721004	z	Shinfield St Mary's CofE Junior School	202122	360
8721004	z	Shinfield Infant and Nursery School	202122	270
8721004	z	The Coombes Church of England Primary School	202122	525
8721004	z	Farley Hill Primary School	202122	420
8721004	z	Grazeley Parochial Church of England Aided Primary School	202122	210
8721004	z	Alder Grove Church of England Primary School	202122	420
8721004	z	Lambs Lane Primary School	202122	210

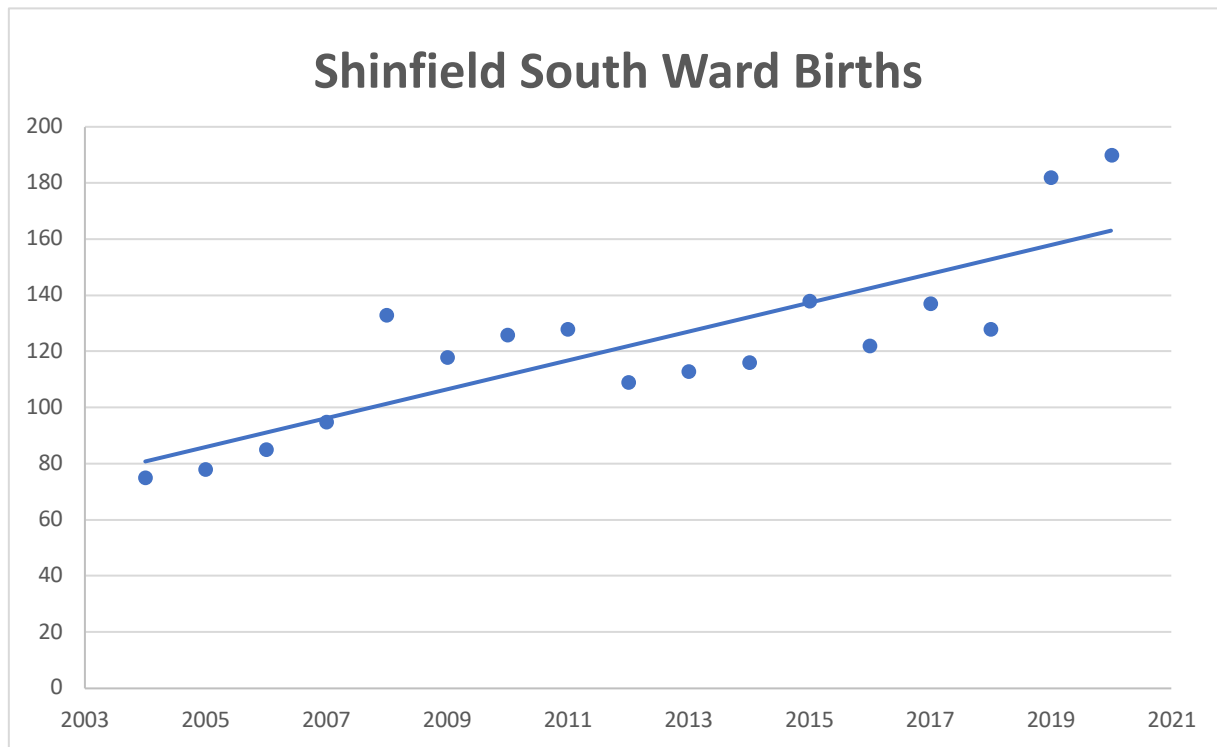
Table 5: South West Neighbourhood Primary Planning Area Schools

WBC is forecast that by the 2027/28 academic year, the schools will be over capacity. This does not include the child yield of any developments approved from September 2023 onwards:

LA name	Year	Planning Area Code	Planning Area Name	Planning Area Phase	nc Year Group	Pupil Foreca...
Wokingham	202223	8721004	South West Neighbourhood Primary	Primary	Primary total	1829
Wokingham	202324	8721004	South West Neighbourhood Primary	Primary	Primary total	1926
Wokingham	202425	8721004	South West Neighbourhood Primary	Primary	Primary total	2020
Wokingham	202526	8721004	South West Neighbourhood Primary	Primary	Primary total	2185
Wokingham	202627	8721004	South West Neighbourhood Primary	Primary	Primary total	2337
Wokingham	202728	8721004	South West Neighbourhood Primary	Primary	Primary total	2447

Table 6: WBC SCAP Forecasts

This growth in pupil numbers is not surprising when looking at birth data in the area, which is seeing a significant increase in recent years, which will be adding pressure to the school landscape:



On the basis that the local school to the development is full and on a site that cannot be expanded, and the new school and existing Infant/Junior Schools are already as large as they are likely to be, the recommendation is to reserve a school site on this development, which could either deliver a new school (unlikely) or accommodate the relocation and growth of Lambs Lane Primary School (the favoured option).

When considering the size of the land, it should be large enough to accommodate 2FE. The BB103 area specification can be seen in the Table below. For a 2FE Primary School with a 60 place Nursery, the site size would be between the following:

Minimum Total Site Area

- $(33.3 \times 420) + (6 \times 60) + 2,000 = 16,346\text{sqm}$ or **1.64ha**

Maximum Total Site Area

- $(42 \times 420) + (7.5 \times 60) + 2,400 = 20,490\text{sqm}$ or **2.05ha**

Recommended minimum site areas for all schools	Base area for any:		Area per pupil place for:			
	primary school	secondary or middle school	Nursery	Reception and Key Stage 1	Key Stage 2 - 4 & post-16	5 to 11 primary
1. Soft outdoor PE	-	6000	-	-	35	20
2. Hard outdoor PE	400	400	-	1.5	1.5	1.5
3. Soft informal and social area	600	600	2	2	2	2
4. Hard informal and social area	200	200	1	1	1	1
5. Habitat	0	0	0	0.5	0.5	0.5
Float	600	800	2	5	5	5
Minimum net site area	1800	8000	5	10	45	30
Non-net	200	1000	1	1	5	3.3
Minimum total site area	2000	9000	6	11	50	33.3
Recommended maximum site areas for new schools (minimum for existing schools where available)						
Maximum net site area	2000	9000	6	11	50	33.3
Maximum total site area	2400	11000	7.5	14	63	42

Table 7: BB103 Site Areas

Therefore, the recommendation is to reserve 2ha on site for the provision of a new 2FE Primary School building, which as discussed, is most likely to be the relocated Lambs Lane School.

A standard new Primary School usually isn't sustainable until it reaches 30 Reception aged pupils. However, a relocated existing Primary School will be viable from Day One as there are already sufficient pupils to ensure sustainability. The additional provision can then come forward as required.

There are usually advantages to developer delivery of the school, in terms of money saving through economies of scale (note: Persimmon PLC is the biggest single provider of Primary Schools in the UK). There are also advantages to County Council delivery, in that they manage the programme, making it somewhat simpler. This would be limited to 1FE as anything larger would not be CIL Reg 122 compliant.

The DfE's PPG on education mitigation is clear on developer delivery of infrastructure. It states (page 34):

Direct delivery of new schools by housing developers may represent good value for money...

This development would be limited to fund the delivery of 1FE, with WBC paying for the remainder of the project through either planning obligations or their Capital budget/Basic Need.

Parents tend to be attracted to new provision over more established facilities, so pupils would likely be drawn to the provision over other local schools, who would likely have a reduction in their applications. This is why new schools are not often popular with existing schools, which are funded on their pupil numbers, and confirms why a relocated and expanded school is favoured.

Additional Early Years provision within the school is consistent with the DfE's best practice guidance.

Discussions are underway with WBC in relation to the neighbouring AWE Burghfield site, and how the school can be designed to respond to any incidents at this nearby location. This is outside the scope of this Report, but is being carefully considered. This would be a direct benefit to both the school, and the surrounding area.

Secondary Education

There are two independent, state funded, non-selective schools accommodating Secondary School aged children within a three-mile radius of the development site. Of these schools, only one is within a three-mile statutory walking distance, and will be considered appropriate capacity for the proposed new houses.

The schools in relation to the development site can be seen below:



Map 7: Secondary School in relation to the development site

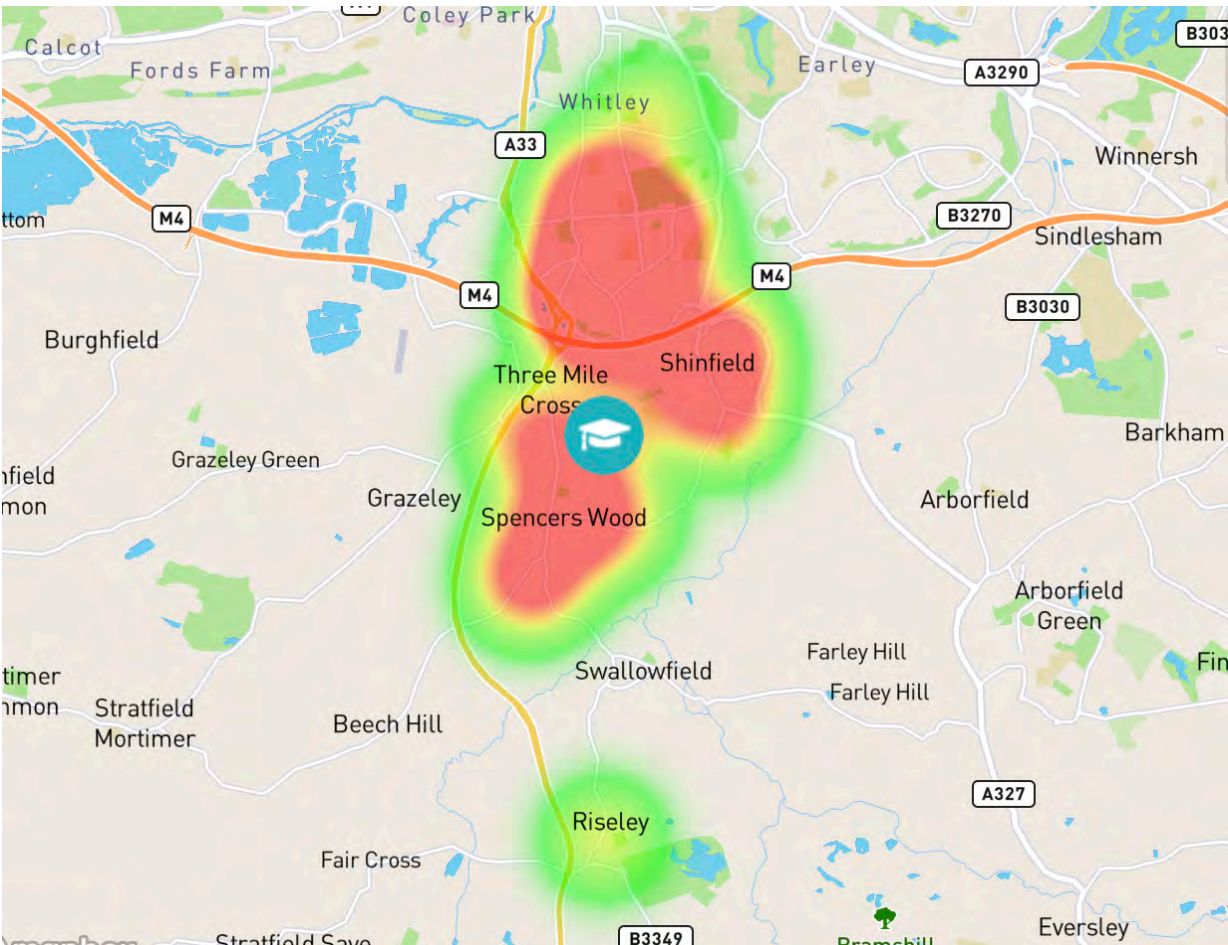
The latest school roll data in the public domain can be seen in the Table below:

Secondary School Name	Postcode	LA Name	Distance (miles)	Capacity	PAN	No R 7-11	Yr 7	Yr 8	Yr 9	Yr 10	Yr 11	Post 16
Oakbank School	RG7 1ER	Wokingham	1.2	560	112	521	104	110	104	98	105	0
TOTAL				560	112	521	104	110	104	98	105	0
Surplus							8	2	8	14	7	
Available Surplus %							7%	2%	7%	13%	6%	

Table 8: School Roll Data (January 2024)

The closest school to the development site, and the only Secondary School that serves Spencer’s Wood in sufficient numbers to trigger the Heat Map, is Oakbank. This is a small 4FE Secondary School approximately 1.2 miles walking distance from the proposed new houses that as of the previous academic year had 39 spare places (7% capacity).

The school serves pupils from Spencer’s Wood and Shinfield, as shown in the Map below:



Map 8: Oakbank Catchment Area Heat Map

Oakbank School is on a large site for its size with an expansion potential. Therefore, should the school need to grow to accommodate the growing population, it would be well placed to do so.

Oakbank is grouped with five additional schools to form the South Secondary Planning Area. The six schools have a combined capacity of 7,006 pupil places:

Secondary Planning Area	School Name	Time Period	Primary Capacity	Secondary Capacity	School Places
8722002	The Forest School	202122	0	1350	1350
8722002	Oakbank	202122	0	560	560
8722002	Bohunt School Wokingham	202122	0	1200	1200
8722002	The Emmbrook School	202122	0	1219	1219
8722002	The Holt School	202122	0	1447	1447
8722002	St Crispin's School	202122	0	1230	1230

Table 9: South Secondary Planning Area Schools

WBC is forecasting that by the 2029/30 academic year, the schools will be collectively 1,239 places over capacity, which will necessitate a new Secondary School in the area. This is prior to the child yield of any developments approved from September 2023 onwards.

LA name	Year	Planning Area Code	Planning Area Name	Planning Area Phase	nc Year Group	Pupil Foreca...
Wokingham	202223	8722002	South	Secondary	Secondary total	6508
Wokingham	202324	8722002	South	Secondary	Secondary total	6917
Wokingham	202425	8722002	South	Secondary	Secondary total	7273
Wokingham	202526	8722002	South	Secondary	Secondary total	7583
Wokingham	202627	8722002	South	Secondary	Secondary total	7825
Wokingham	202728	8722002	South	Secondary	Secondary total	8043
Wokingham	202829	8722002	South	Secondary	Secondary total	8216
Wokingham	202930	8722002	South	Secondary	Secondary total	8245

Table 10: WBC SCAP Forecasts

WBC state in their School Place Plan:

Firstly, Shinfield is served by one secondary school, Oakbank, which admits c.120 pupils a year. Local primary schools admit 210 pupils (with further growth to follow). Alternative schools are not within walking distance, so the provision is unbalanced. There are no immediate local solutions, but one may become available in conjunction with the proposed Loddon Valley Garden Village (Hall Farm), which was a preferred allocation in consultative stages of the emerging local plan. Conversely, the schools that many Shinfield residents do rely on are in Winnersh and Wokingham Town. The option of a new school in Hall Farm could negatively impact on the current schools that supply the places for children in Shinfield. However, further residential development on the southern edge of Wokingham Town is expected and the number of children living in the communities around that area requiring secondary places will also increase. As a consequence, it is possible that rebalancing could be achieved, in time, without any detriment or need to make changes to existing Winnersh / Wokingham Town provision.

On the basis of the above, it would not be unreasonable for this development to contribute – via either Section 106 or CIL – towards expanding the Secondary phase. There is certainly no Secondary School related reason for this development not to progress.



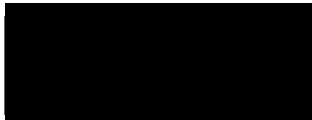
Conclusion and Recommendations

The recommendation of this Report is to reserve 2ha on site for the provision of a relocated Lambs Lane Primary School, which would be 2FE (a net growth of 1FE, which exceeds the yield of this development at 420 dwellings). The amount of land that would be provided gratis would only be commensurate to the child yield of the development (as would the financial contribution).

From a Secondary School perspective, it would not be unreasonable for this development to contribute – via either Section 106 or CIL – towards expanding the Secondary phase.

Both the Primary and Secondary School phases are forecasting considerable growth in the coming years. Therefore, there is justification for contributions/land for new infrastructure provision.

Continued consultation with WBC will be beneficial as this development progresses.



Ben Hunter

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EFM