



Northumberland

County Council

Your ref:

Our ref:

Enquiries to: Lesley Little

Email: Lesley.Little@northumberland.gov.uk

Tel direct: 01670 622614

Date: Wednesday, 2 November 2022

Dear Sir or Madam,

Your attendance is requested at a meeting of the **FAMILY AND CHILDREN'S SERVICES OVERVIEW AND SCRUTINY COMMITTEE** to be held in **COUNCIL CHAMBER - COUNTY HALL** on **THURSDAY, 10 NOVEMBER 2022** at **2.00 PM**.

Yours faithfully

Rick O'Farrell
Interim Chief Executive

To Family and Children's Services Overview and Scrutiny Committee members as follows:-

C Ball, A Dale, W Daley (Chair), R Dodd (Vice-Chair), C Dunbar, S Fairless-Aitken, M Richardson, M Swinburn, T Thorne and A Watson

AGENDA

PART I

It is expected that the matters included in this part of the agenda will be dealt with in public.

1. APOLOGIES FOR ABSENCE

2. MINUTES

(Pages 1
- 6)

The minutes of the Family and Children's Services Overview and Scrutiny Committees held on Thursday 6 October 2022, as circulated, to be agreed as a true record and signed by the Chair.

3. DISCLOSURE OF MEMBERS' INTERESTS

Unless already entered in the Council's Register of Members' interests, members are required where a matter arises at a meeting;

- a. Which **directly relates to** Disclosable Pecuniary Interest ('DPI') as set out in Appendix B, Table 1 of the Code of Conduct, to disclose the interest, not participate in any discussion or vote and not to remain in room. Where members have a DPI or if the matter concerns an executive function and is being considered by a Cabinet Member with a DPI they must notify the Monitoring Officer and arrange for somebody else to deal with the matter.
- b. Which **directly relates to** the financial interest or well being of a Other Registrable Interest as set out in Appendix B, Table 2 of the Code of Conduct to disclose the interest and only speak on the matter if members of the public are also allowed to speak at the meeting but otherwise must not take part in any discussion or vote on the matter and must not remain the room.
- c. Which **directly relates to** their financial interest or well-being (and is not DPI) or the financial well being of a relative or close associate, to declare the interest and members may only speak on the matter if members of the public are also allowed to speak. Otherwise, the member must not take part in discussion or vote on the matter and must leave the room.
- d. Which **affects** the financial well-being of the member, a relative or close associate or a body included under the Other Registrable Interests column in Table 2, to disclose the interest and apply the test set out at paragraph 9 of Appendix B before deciding whether they may remain in the meeting.
- e. Where Members have or a Cabinet Member has an Other Registerable Interest or Non Registerable Interest in a matter being considered in exercise of their executive function, they must notify the Monitoring Officer and arrange for somebody else to deal with it.

NB Any member needing clarification must

contact monitoringofficer@northumberland.gov.uk. Members are referred to the Code of Conduct which contains the matters above in full. Please refer to the guidance on disclosures at the rear of this agenda letter.

4. FORWARD PLAN OF KEY DECISIONS

(Pages 7
- 18)

To note the latest Forward Plan of key decisions for October 2022 to January 2023. Any further changes made to the Forward Plan will be reported to the committee.

5. CABINET REPORT - OUTCOMES OF STATUTORY CONSULTATION ON PROPOSALS FOR THE COQUET PARTNERSHIP

(Pages
19 - 222)

The report sets out an analysis of the representations and responses received from interested parties and stakeholders during the statutory consultation in relation to proposals for the Coquet Partnership. The report also sets out an analysis of the responses received to the statutory consultation in relation to proposals for Barndale House Special School. Cabinet is being asked to make a final decision on whether or not to approve the prescribed changes for schools in the Coquet Partnership and for Barndale House Special School, as set out in the Statutory Proposals, for implementation with effect from 1st September 2024. At the same time, Cabinet is requested to consider and approve the non-statutory proposal to extend the age range of Grange View Church of England First Schools with effect from 1st September 2024. Comments made by this Committee will be reported to Cabinet when they consider the report on 17 November 2022.

6. CABINET REPORT - SEND CAPACITY AND PLACE PLANNING STRATEGY

(Pages
223 -
280)

The report advises Cabinet of the development of a 5 year SEND Capacity and Place Planning Strategy. Comments made by this Committee will be reported to Cabinet when they consider the report on 17 November 2022.

7. FAMILY AND CHILDREN'S SERVICES OVERVIEW AND SCRUTINY COMMITTEE WORK PROGRAMME AND MONITORING REPORT 2022/23

(Pages
281 -
292)

Members are asked to review and note the Family and Children's Services Overview and Scrutiny Committee Work Programme and Monitoring Report.

8. URGENT BUSINESS

IF YOU HAVE AN INTEREST AT THIS MEETING, PLEASE:

- Declare it and give details of its nature before the matter is discussed or as soon as it becomes apparent to you.
- Complete this sheet and pass it to the Democratic Services Officer.

Name:		Date of meeting:	
Meeting:			
Item to which your interest relates:			
Nature of Interest i.e. either disclosable pecuniary interest (as defined by Table 1 of Appendix B to the Code of Conduct, Other Registerable Interest or Non-Registerable Interest (as defined by Appendix B to Code of Conduct) (please give details):			
Are you intending to withdraw from the meeting?		Yes - <input type="checkbox"/>	No - <input type="checkbox"/>

Registering Interests

Within 28 days of becoming a member or your re-election or re-appointment to office you must register with the Monitoring Officer the interests which fall within the categories set out in **Table 1 (Disclosable Pecuniary Interests)** which are as described in "The Relevant Authorities (Disclosable Pecuniary Interests) Regulations 2012". You should also register details of your other personal interests which fall within the categories set out in **Table 2 (Other Registerable Interests)**.

"Disclosable Pecuniary Interest" means an interest of yourself, or of your partner if you are aware of your partner's interest, within the descriptions set out in Table 1 below.

"Partner" means a spouse or civil partner, or a person with whom you are living as husband or wife, or a person with whom you are living as if you are civil partners.

1. You must ensure that your register of interests is kept up-to-date and within 28 days of becoming aware of any new interest, or of any change to a registered interest, notify the Monitoring Officer.
2. A 'sensitive interest' is as an interest which, if disclosed, could lead to the councillor, or a person connected with the councillor, being subject to violence or intimidation.
3. Where you have a 'sensitive interest' you must notify the Monitoring Officer with the reasons why you believe it is a sensitive interest. If the Monitoring Officer agrees they will withhold the interest from the public register.

Non participation in case of disclosable pecuniary interest

4. Where a matter arises at a meeting which directly relates to one of your Disclosable Pecuniary Interests as set out in **Table 1**, you must disclose the interest, not participate in any discussion or vote on the matter and must not remain in the room unless you have been granted a dispensation. If it is a 'sensitive interest', you do not have to disclose the nature of the interest, just that you have an interest.

Dispensation may be granted in limited circumstances, to enable you to participate and vote on a matter in which you have a disclosable pecuniary interest.

5. Where you have a disclosable pecuniary interest on a matter to be considered or is being considered by you as a Cabinet member in exercise of your executive function, you must notify the Monitoring Officer of the interest and must not take any steps or further steps in the matter apart from arranging for someone else to deal with it.

Disclosure of Other Registerable Interests

6. Where a matter arises at a meeting which **directly relates** to the financial interest or wellbeing of one of your Other Registerable Interests (as set out in **Table 2**), you must disclose the interest. You may speak on the matter only if members of the public are also allowed to speak at the meeting but otherwise must not take part in any discussion or vote on the matter and must not remain in the room unless you have been granted a dispensation. If it is a 'sensitive interest', you do not have to disclose the nature of the interest.

Disclosure of Non-Registerable Interests

7. Where a matter arises at a meeting which **directly relates** to your financial interest or well-being (and is not a Disclosable Pecuniary Interest set out in **Table 1**) or a financial interest or well-being of a relative or close associate, you must disclose the interest. You may speak on the matter only if members of the public are also allowed to speak at the meeting. Otherwise you must not take part in any discussion or vote on the matter and must not remain in the room unless you have been granted a dispensation. If it is a 'sensitive interest', you do not have to disclose the nature of the interest.

8. Where a matter arises at a meeting which **affects** –

- a. your own financial interest or well-being;
- b. a financial interest or well-being of a relative or close associate; or
- c. a financial interest or wellbeing of a body included under Other Registrable Interests as set out in **Table 2** you must disclose the interest. In order to determine whether you can remain in the meeting after disclosing your interest the following test should be applied

9. Where a matter (referred to in paragraph 8 above) **affects** the financial interest or well- being:

- a. to a greater extent than it affects the financial interests of the majority of inhabitants of the ward affected by the decision and;
- b. a reasonable member of the public knowing all the facts would believe that it would affect your view of the wider public interest

You may speak on the matter only if members of the public are also allowed to speak at the meeting. Otherwise, you must not take part in any discussion or vote on the matter and must not remain in the room unless you have been granted a dispensation.

If it is a 'sensitive interest', you do not have to disclose the nature of the interest.

Where you have an Other Registerable Interest or Non-Registerable Interest on a matter to be considered or is being considered by you as a Cabinet member in exercise of your executive function, you must notify the Monitoring Officer of the interest and must not take any steps or further steps in the matter apart from arranging for someone else to deal with it.

Table 1: Disclosable Pecuniary Interests

This table sets out the explanation of Disclosable Pecuniary Interests as set out in the [Relevant Authorities \(Disclosable Pecuniary Interests\) Regulations 2012](#).

Subject	Description
Employment, office, trade, profession or vocation	Any employment, office, trade, profession or vocation carried on for profit or gain. [Any unpaid directorship.]
Sponsorship	Any payment or provision of any other financial benefit (other than from the council) made to the councillor during the previous 12-month period for expenses incurred by him/her in carrying out his/her duties as a councillor, or towards his/her election expenses. This includes any payment or financial benefit from a trade union within the meaning of the Trade Union and Labour Relations (Consolidation) Act 1992.
Contracts	Any contract made between the councillor or his/her spouse or civil partner or the person with whom the councillor is living as if they were spouses/civil partners (or a firm in which such person is a partner, or an incorporated body of which such person is a director* or a body that such person has a beneficial interest in the securities of*) and the council — (a) under which goods or services are to be provided or works are to be executed; and (b) which has not been fully discharged.
Land and Property	Any beneficial interest in land which is within the area of the council. ‘Land’ excludes an easement, servitude, interest or right in or over land which does not give the councillor or his/her spouse or civil partner or the person with whom the councillor is living as if they were spouses/ civil partners (alone or jointly with another) a right to occupy or to receive income.
Licenses	Any licence (alone or jointly with others) to occupy land in the area of the council for a month or longer
Corporate tenancies	Any tenancy where (to the councillor’s knowledge)— (a) the landlord is the council; and (b) the tenant is a body that the councillor, or his/her spouse or civil partner or the person with whom the councillor is living as if they were spouses/ civil partners is a partner of or a director* of or has a beneficial interest in the securities* of.
Securities	Any beneficial interest in securities* of a body

	<p>where—</p> <p>(a) that body (to the councillor's knowledge) has a place of business or land in the area of the council; and</p> <p>(b) either—</p> <ul style="list-style-type: none"> i. the total nominal value of the securities* exceeds £25,000 or one hundredth of the total issued share capital of that body; or ii. if the share capital of that body is of more than one class, the total nominal value of the shares of any one class in which the councillor, or his/ her spouse or civil partner or the person with whom the councillor is living as if they were spouses/civil partners has a beneficial interest exceeds one hundredth of the total issued share capital of that class.
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* 'director' includes a member of the committee of management of an industrial and provident society.

* 'securities' means shares, debentures, debenture stock, loan stock, bonds, units of a collective investment scheme within the meaning of the Financial Services and Markets Act 2000 and other securities of any description, other than money deposited with a building society.

Table 2: Other Registrable Interests

You have a personal interest in any business of your authority where it relates to or is likely to affect:

- a) any body of which you are in general control or management and to which you are nominated or appointed by your authority
- b) any body
 - i. exercising functions of a public nature
 - ii. any body directed to charitable purposes or
 - iii. one of whose principal purposes includes the influence of public opinion or policy (including any political party or trade union)

NORTHUMBERLAND COUNTY COUNCIL

FAMILY AND CHILDREN'S SERVICES OVERVIEW AND SCRUTINY COMMITTEE

At the meeting of the **Family and Children's Services Overview and Scrutiny Committee** held at Council Chamber - County Hall on Thursday, 6 October 2022 at 10.00 am.

PRESENT

W Daley (Chair) (in the Chair)

COUNCILLORS

C Ball
R Dodd
S Fairless-Aitken
M Swinburn
A Watson

A Dale
C Dunbar
M Richardson
T Thorne

CHURCH REPRESENTATIVES

A Hodgson
P Rickeard

D Lennox

TEACHER UNION REPRESENTATIVES

L Houghton

J Sanderson

OFFICERS

C Angus
S Aviston
L Bryden
N Dorward

A Kingham
L Little
D Street
G Younger

Scrutiny Officer
Head of School Organisation and Resources
Senior Manager - Commissioning
Senior Manager - Education Development & Collaborative Projects
Joint Interim Director of Children's Services
Senior Democratic Services Officer
Deputy Director of Education
Accommodation Lead

ALSO PRESENT

G Renner-Thompson
K Cowell

Cabinet Member
Regional Director

There was 1 member of the press and public present.

34 **APOLOGIES FOR ABSENCE**

Apologies had been received from G Reiter.

35 **MINUTES**

RESOLVED that the minutes of the Family and Children's Services Overview and Scrutiny Committee held on Thursday 8 September 2022, as circulated, be agreed as a true record and be signed by the Chair.

36 **DISCLOSURE OF MEMBERS' INTERESTS**

P Rickeard advised that he was the Director of Education for the Diocese which had 5 schools within the Berwick Partnership.

37 **FORWARD PLAN OF KEY DECISIONS**

RESOLVED that the information be noted.

38 **REGIONAL SCHOOLS DIRECTOR OVERVIEW**

Katherine Cowell, Regional Director North East, was in attendance to provide a presentation on the purpose and responsibilities of the Regional Director and Regions Group which now brought together improvement and intervention work in Children's Social Care, SEND and schools and was accountable to the Secretary of State. She advised that the Regions Group had been established in July 2022 as the final stage of the structural changes to the Department for Education and that had been when her role had changed from Regional Schools Commissioner.

The actions and interventions which could be taken in the case of inadequate schools or Academy Trusts were outlined. Close working with local authorities was also undertaken in respect of school places and sufficiency. The Schools White Paper set an ambitious goal of all schools to either be in, have plans to join or form a strong multi-academy trust (MAT) by 2030. Information was also provided on Education Investment Areas whereby 55 local authority areas had been identified in the Levelling Up White Paper with the implementation of a package of measures to drive school improvement and pupil outcomes.

In response to a question raised on failing academies, Members were advised that there were a range of different ways in which academies could be supported and it was the view that academies performed better in a strong MAT. In respect of replicating the success of the London Challenge it was confirmed that there had been some good results in the North East as part of the Education Challenge.

The Regional Director advised that her role did not have direct links with teaching staff as she worked closely with local authorities and at Trust level but did

recognise the additional expectations which were being put on teachers. However strong trusts also focussed on workforce wellbeing and had strong emphasis on student inclusion and destinations and it was not about size. The good relationships between the Regional Group, local authorities and the two dioceses working for the benefit of all children in the region was highlighted.

The Chair and Members thanked the Regional Director for her attendance, advising that she would be welcome to attend future meetings.

39 **CABINET REPORT - OUTCOMES OF CONSULTATION ON BERWICK CONSULTATION**

The Cabinet report set out the feedback received from stakeholders arising from Phase 1 of informal consultation with stakeholders in the Berwick Partnership area and other relevant parties on whether any models of organisation that may be brought forward with specific proposals for schools (Phase 2) should consist of only 3-tier models of organisation or include 3-tier and 2-tier (primary/secondary) models of organisation. As a result of the feedback, Cabinet was being recommended to approve Phase 2 consultation on specific proposals for individual schools in the partnership within both a 3-tier and 2-tier (primary/secondary) structure, including some school closures. This would consist of a 15 week (school weeks) consultation beginning on 31 October 2022.

A comprehensive introduction to the Cabinet report was provided by Councillor Renner-Thompson, Cabinet Member for Children's Services and S Aviston, Head of School Organisation and Resources who advised that this was a good example of partnership working and whilst account would be taken of the responses received, this would not be the only determining factor in making any decision and suggestions made at this stage would be subject to change following the next consultation.

In response to a request to include GCSE results for Berwick Academy in the next report if it was agreed to proceed to the next stage, it was confirmed that whilst this information could be included, this data would not be validated until January 2023 and should not be compared to previous data due to the impact of Covid. It was commented that staff in schools had been disappointed to read of possible school closures in the report and had not been advised of this prior to its publication. S Aviston advised that this was disappointing as they had been working with the Headteachers over the past twelve months and the possibility of the closure of schools had been made clear. All Headteachers had received a telephone call from a senior manager on the detail of the report and a link sent to the report on the Council's website as soon as it had been published. Reassurance was provided that all staff would have the opportunity to express their views fully and work would be undertaken, as usual on the possible redeployment of any affected staff should this be needed.

Mr Hodgson apologised that no response had been received from the Diocese of Hexham and Newcastle and advised that they were in support of a 2-tier option. He highlighted that due to the long distance to the secondary Catholic School, which was in Bedlington, a high proportion of children opted to stay within the Berwick Partnership.

It was clarified that mapping systems giving details of schools and catchment areas was available on the website and these had been provided as part of the consultation documentation and would also be made available at consultation events. At the current time approximately 200 children left the partnership to be educated and it was essential to gain local community support to ensure that the high school remained viable and the development model was sustainable. If it progressed to the next stage, the importance of increasing engagement was highlighted with officers confirming that the options outlined were a starting point and a lot of engagement work was still to be undertaken allowing ideas to come forward and options evolve.

Members particularly welcomed the proposals in relation to the development of SEND provision.

RESOLVED that Cabinet be advised that this Committee supported the recommendations in the report.

40 **CABINET REPORT - SUPPORTED ACCOMMODATION AND LODGINGS FOR CARE LEAVERS AND YOUNG HOMELESS - PERMISSION TO TENDER**

The report sought permission from Cabinet to go to the market to commission a range of services to provide supported accommodation and lodgings for Northumberland care leavers and young homeless which would assist the Council in meeting its statutory duties. An introduction to the report was provided by L Bryden, Senior Manager, Commissioning and G Younger, Accommodation Lead.

Members were advised that since the current framework had come into place there had been 156 young people placed across a whole range of services. Since April 2022 there had been 55 placements. The service was seeing a large increase in the number of young people requiring placements with a 116% increase in the numbers between 2020/21 to 2021/22 across a number of types of providers and this increase in demand would continue to rise as the Council was now part of the National Transfer Scheme for unaccompanied young asylum seekers.

The Chair suggested that as this report was only requesting permission from Cabinet to go to tender to create a dynamic purchasing system it would be useful to ask the officers to attend a future meeting to provide an account of the service and this would be scheduled into the programme.

RESOLVED that Cabinet be advised that this Committee supported the recommendations outlined in the report and asked that a report be brought back to the Committee at a future date outlining the available services and anticipated placement numbers.

41 **THE NORTHUMBERLAND STRATEGIC INCLUSION PLAN 2022-2026**

The report provided the first Northumberland Strategic Inclusion Strategy which had been developed in response to the recommendations of the Exclusion Task and Finish Working Group and follows previous reports to this Committee on their

findings and recommendations. An introduction to the report was provided by S Aviston, Head of School Organisation and Resources who highlighted the work of the Task and Finish Working Group in securing resources for the appointment of additional team members to help address the previous high levels of exclusion.

In response to a question regarding the affordability of alternative provision, Members were advised that meetings of the Inclusion Group were to be held fortnightly where schools would be able to request extra support for a pupil or where assistance was required with the cost of transport to alternative provision.

More detail as to the reason why Ashington, Bedlington and Blyth had the majority of the exclusions would be provided. It was clarified that the majority of academies access the free support and guidance offered and whilst it was more challenging to get information from certain academies, the important issue was that they all knew that the support offer was available. The Committee was advised that there was currently a free school bid being developed for alternative provision which it was hoped would impact on the number of permanent exclusions.

C Angus would do a briefing note for Members on the detail of Appendix 2 which would be circulated and a further decision would be made on whether a more detailed report would be required.

Councillor Swinbank was thanked as the Chair of the Task and Finish Working Group for the work undertaken on this and he in turn thanked all those that had been involved in the Working Group and also the staff and schools who had worked to reduce the level of exclusions. He questioned if information on good practice was being shared and expressed disappointment that those pupils with SEND and EHCPs were being excluded

It was clarified that no exclusions had been the result of uniform infringements and the detail of exclusions would likely be included within the Annual Report. Members were also invited to visit the Pupil Referral Unit. In response to a question regarding early identification of dyslexia it was confirmed that early identification of any SEN was important and whilst a number of central teams focussed on early literacy there was not a particular strand specifically for dyslexia, but this would be picked up with officers.

RESOLVED that the Committee welcomed the report and noted the content and detailed strategy along with the impact that the work undertaken within Children's Services and Schools has had on the lives of Northumberland children.

42 **POST CABINET DECISION UPDATE: RDA RELOCATION FROM TRANWELL (PEGASUS CENTRE) TO KIRKLEY HALL CAMPUS (NORTHUMBERLAND COLLEGE)**

The report set out the progress made in preparing to deliver the capital project since approval being granted by Cabinet in March 2022 and was introduced by N Dorward, Senior Manager, Education Development & Collaborative Projects.

Members expressed their disappointment that the delay had resulted in children

not being able to take part in riding lessons and stated that in future arrangements should be made in advance to ensure a smooth transition, which was what had been expected by this Committee.

RESOLVED that the information in the report be noted.

43 **FAMILY AND CHILDREN'S SERVICES OVERVIEW AND SCRUTINY
COMMITTEE WORK PROGRAMME AND MONITORING REPORT 2022/23**

The work programme had been circulated for information and any issues which Members wished to bring to the Committee should be raised with the Chair or the Scrutiny Officer in the first instance.

The date of the next meeting has been changed to 2.00 pm on 10 November 2022.

RESOLVED that the information be noted.

CHAIR.....

DATE.....

Forward Plan

FORTHCOMING CABINET DECISIONS OCTOBER 2022 TO JANUARY 2023

DECISION	PROPOSED SCRUTINY DATE	CABINET DATE
<p>Council Tax Support Scheme for 2023/24 Since 1 April 2013 the Council is required to have its own council tax support scheme to provide assistance to council taxpayers on low incomes. The scheme needs to be approved annually and assistance is by way of a reduction in the amount of council tax that is due. The Council Tax Support Scheme needs County Council approval. (R. Wearmouth/G. Barnes – 01670 624351)</p>	<p>Corporate Services and Economic Growth OSC 10 October 2022</p>	<p>11 October 2022 Council 2 November 2022</p>
<p>"Market Sustainability and Fair Cost of Care Fund" Submission To seek Cabinet approval for a submission to the Department of Health and Social Care to comply with the grant conditions of the Market Sustainability and Fair Cost of Care Fund 2022 to 2023. (W. Pattison/N. Bradley - 01670 622868)</p>	<p>N/A</p>	<p>11 October 2022</p>
<p>Northumberland Destination Management Plan Destination Management is a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment. A Destination Management Plan (DMP) is a shared statement of intent to manage a destination over</p>	<p>C&P OSC 5 October 2022</p>	<p>11 October 2022</p>

<p>a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources. This report requests that the County Council endorse the Vision, Partnership Principles, Strategic Aims, and Priorities of the 10 year DMP for Northumberland.</p> <p>(J. Watson/Nigel Walsh 07789654472)</p>		
<p>Outcomes of Consultation on Berwick Partnership Organisation</p> <p>This report sets out the feedback received from stakeholders arising from Phase 1 of informal consultation with stakeholders in the Berwick Partnership area and other relevant parties on whether any models of organisation that may be brought forward with specific proposals for schools (Phase 2) should consist of only 3-tier models of organisation or include 3-tier and 2-tier (primary/secondary) models of organisation.</p> <p>Cabinet is also asked to permit the initiation of the Phase 2 informal consultation with stakeholders in the area served by Berwick Partnership and other relevant stakeholders on proposals for individual schools in the partnership. The outcomes of Phase 2 consultation would be brought back to Cabinet at a later date.</p> <p>(G. Renner Thompson/S. Aviston - 01670 622281)</p>	<p>FACS OSC 6 October 2022</p>	<p>11 October 2022</p>
<p>Revised Joint Charter with Town, Parish and Community Councils</p> <p>This report updates Cabinet and seeks approval for the publication of the revised joint Charter between the Council and the Town, Parish and Community Councils (TPCCs) in Northumberland.</p>	<p>Communities and Place OSC 26 October 2022</p>	<p>11 October 2022</p>

<p>This revised Charter includes minor amendments to the 2019 edition and has been prepared following consultation with Northumberland Association of Local Councils (NALC). It defines joint principles to enable the Council and TPCCs to work effectively together to improve the economic, social and environmental well-being of Northumberland. (G. Sanderson/Iain Hedley -07747 473687)</p>		
<p>Supported Accommodation and Lodgings for Care Leavers and Young Homeless</p> <p>The report seeks permission from Cabinet to go to the market to commission a range of services to provide supported accommodation and lodgings for Northumberland care leavers and young homeless which will assist the Council in meeting its statutory duties.</p> <p>The Council has a responsibility to provide support and accommodation to:</p> <ul style="list-style-type: none"> • Looked After young people and Care leavers under the Children Act 1989; • Young people presenting as homeless and needing accommodation in line with the Statutory guidance - Provision of accommodation for 16- and 17-year-olds who may be homeless and/or require accommodation • Separated children (formally known as unaccompanied asylum-seeking children); • Young people who require support after the age of 18 in line with the Staying Put agenda. • Other young people aged 16 and above who are beyond 	<p>FACS OSC 6 October 2022</p>	<p>11 October 2022</p>

<p>school leaving age who may require provision under this service as and when they meet varying Local Authority thresholds.</p> <p>The intention is to create a Dynamic Purchasing System (DPS) which will allow the Council to contract with a range of pre-qualified suppliers, supporting access to a range of placements across the County for eligible young people. Unlike a framework arrangement, a DPS allows suppliers to join at pre-agreed points of time, encouraging competition and making it easier for local suppliers to access the arrangement. This will support the Council in meeting its duties during a time of change; Ofsted regulation for this sector is due to be introduced in late 2023 and is expected to cause some disruption within the marketplace as providers determine whether they are willing and able to meet the new guidelines. A DPS will create a more flexible solution providing the Council with improved access to suppliers in order to meet need.</p> <p>(G. Renner Thompson/M. Connor 07833 437064)</p>		
<p>Working together with VCSE – Non recurrent variation to VCSE Infrastructure Contract</p> <p>This purpose of this report is to seek approval to expand the current Northumberland Communities Together (NCT) and Voluntary Community and Social Enterprise (VCSE) Infrastructure contract to include additional funding obtained from NHS Northumberland CCG, now the Integrated Care Board, to support the Thriving Together work between Northumberland Communities Together and the VCSE</p> <p>(W. Pattison/M. Taylor - 01670 622430)</p>		11 October 2022
<p>Applying the Council Owned Company Rationale to</p>		17 November 2022

<p>Advance Northumberland Ltd and Update on the Business Strategy Review</p> <p>In anticipation of agreement to the statement of principles and tests for establishing or continuing Council-owned companies established under the Localism Act, this report sets out the outcome of applying the agreed principles and tests to Advance Northumberland Ltd (ANL), as an existing company of Northumberland County Council, and provides an update on the Advance Northumberland Ltd Review of Business Strategy.</p> <p>(R. Wearmouth/W. Ploszaj/S. McMillan – 07814298052)</p>		
<p>Bebside to Blyth Town Centre Cycling & Walking Corridor</p> <p>This report updates Cabinet and seeks approval of the Outline Business Case and other key decisions regarding the development and delivery of the Bebside to Town Centre Cycling & Walking Corridor project.</p> <p>(W. Ploszaj/L. Baker - 07919 217457)</p>		17 November 2022
<p>Budget 2023-24 and Medium Term Financial Plan 2023-27</p> <p>This report provides an update on the development of the 2023-24 Budget and the Medium-Term Financial Plan (MTFP) covering the period 2023 to 2027. This report also details budget proposals for 2023-24 to meet the budget gap, as a basis for budget consultation, prior to the receipt of the Local Government Finance Settlement 2023-24 in December 2022.</p> <p>(R. Wearmouth/A. Elsdon 01670 622168)</p>	<p>Corporate Services and Economic Growth OSC</p> <p>12 December 2022</p>	17 November 2022
<p>Energising Blyth: NEP1 – Dock Infrastructure – Capping Beam</p>		17 November 2022

<p>This report updates Cabinet and seeks approval of the Outline Business Case and other key decisions regarding the development and delivery of the Northumberland Energy Park (NEP1) Ash Dock Capping Beam. The Capping Beam will be installed along the already completed new dock walls and is necessary to operate the dock for investors as it provides structural stability for craneage, concrete apron and provides fixings for ladders and mooring fenders. The Business Case is seeking £500k Government grant through the DLUHC Town Deal Fund as part of the Energising Blyth Programme with a match fund of £900k (NELEP) and £31.6k (NCC).</p> <p>(W. Ploszaj/L. Baker - 07919 217457)</p>		
<p>Family Hubs Development</p> <p>Northumberland has been selected as one of the 75 local authorities who can receive additional funding to develop the Family Hub offer. The overall amount potentially available for Northumberland between Autumn 2022 and March 2025 is indicated to be between £3.321m and £3.446m. Work has been ongoing to develop the Family Hub model in Northumberland for some time, building on the already established Early Help Locality Model across the county.</p> <p>(G. Renner Thompson/M. Connor - 01670 620349)</p>		17 November 2022
<p>Future of Northumberland Enterprise Holdings Ltd and Northumbria Integrated Consultancy Ltd</p> <p>The purpose of this report is to provide options for consideration by Cabinet regarding the future status of the Council's wholly-owned company Northumberland Enterprise Holdings Ltd and its subsidiary</p>		17 November 2022

company Northumbria Integrated Consultancy Ltd, propose the Role Profile for the Northumberland Enterprise Holdings Ltd Controlling Shareholder's Representative ("CSR") and propose the appointment of the Executive Director of Finance as CSR of Northumberland Enterprise Holdings Ltd to provide alignment and uniformity with the Council's other wholly-owned company, Advance Northumberland Ltd (R. Wearmouth/W. Thompson – 07929836782)		
Leisure Service Review This report presents the findings and recommendations from the leisure service review. (J. Watson/ M. Taylor - 01670 622430) (Confidential report)		17 November 2022
Market Position Statement The report will ask Cabinet to approve the publication of the updated Adult Social Care Market Position Statement. (W. Pattison/A. Curry 07557948621)	H&W OSC 1 November 2022	17 November 2022
Northumberland SEND Place Planning Strategy To advise Cabinet of the development of a 5 year SEND Capacity and Place Planning Strategy for Northumberland and to seek approval of the strategy. (G. Renner Thompson/S. Aviston - 01670 622281)	FACS OSC 10 November 222	17 November 2022
Rationale for Companies The purpose of this report is to propose a statement of principles, tests and decision filters which together determine the "Rationale" for the establishment or continuation of any company established by Northumberland County Council		17 November 2022

under the provisions of the Localism Act 2011. (R. Wearmouth/W. Thompson – 07929836782)		
Regent Street, Blyth Improvements (Northern Gateway Phase 2) This report updates Cabinet and seeks approval of the Outline Business Case and other key decisions regarding the development and delivery of the Regent Street Improvements (Northern Gateway Phase 2) project. (W. Ploszaj/L. Baker - 07919 217457)		17 November 2022
Statutory Proposals for schools in the Coquet Partnership and Barndale House Special School This report will set out an analysis of the representations received from interested parties relating to the Council's statutory proposals for the local authority-maintained schools in the Coquet Partnership (Amble First, Amble Links, Broomhill, Red Row and Grange View CE First Schools and James Calvert Spence College). The report will also set out an analysis of the representations received in relation to a separate statutory proposal for the creation of a satellite school for Barndale House Special School in the current James Calvert Spence College building at South Avenue, Amble, which is relevant to but not dependent on the outcome of the statutory proposal for the maintained schools in Coquet Partnership. (G. Renner Thompson/S. Aviston - 01670 6222810)	FACS OSC 10 November 2022	17 November 2022
Council Tax Base 2023/24 The Council is required to set its council tax base annually. The tax base must be set between the 1st of December and	Corporate Services and Economic Growth OSC 12 December 2022	13 December 2022

31st January. The tax base is a measure of the Council's taxable capacity which is used for the setting of its council tax. Legislation sets out the formula for calculation. Cabinet have delegated authority to approve the tax base. (R. Wearmouth/G. Barnes – 01670 624351)		
Financial Performance 2022-23 - Position at the end of September 2022 The report will provide Cabinet with the revenue and capital financial performance against budget as at 30 September 2022. (R. Wearmouth/K. Harvey - 01670 624783)	N/A	13 December 2022
Trading Companies' Financial Performance 2022-23 - Position at the end of September 2022 The purpose of the report is to ensure that the Cabinet is informed of the current financial positions of its trading companies for 2022-23 (R. Wearmouth/M. Calvert - 01670 620197) (Confidential report)	Corporate Services and Economic Growth OSC 12 December 2022	13 December 2022
Budget 2023-24 , Medium Term Financial Plan 2023-27 and 30 Year Business Plan for the Housing Revenue Account The report presents to Cabinet, the updated Budget 2023-24, Medium Term Financial Plan 2023-27 and 30 year Business plan for the Housing Revenue Account. (R. Wearmouth/A. Elsdon – 01670 622168)	CSEG OSC 9 January 2023	10 January 2023
Notification of the Estimated Collection Fund Balances 2022-23 – Council Tax and Business Rates		10 January 2023

<p>The report will advise members of the estimated surplus or deficit balances on the Collection Fund in relation to Council Tax and Business Rates at 31 March 2023. The Local Government Finance Act 1992 (as amended) requires the Council as the Billing Authority to calculate a Council Tax Collection Fund estimate by 15th January each year. The Non-Domestic Rating (Rates Retention) Regulations 2013 require the Council as the Billing Authority to calculate a Business Rates Collection Fund estimate on or before 31st January each year.</p> <p>(R. Wearmouth/A. Elsdon – 01670 622168)</p>		
<p>Recommissioning of an Integrated Drug and Alcohol Service for Adults in Northumberland</p> <p>To seek permission from Cabinet to commission an integrated Drug and Alcohol Service for Adults in Northumberland. This Service will be commissioned using the Public Health Ring-Fenced Grant. The grant conditions state that Local Authorities must improve the take up of, and outcomes from, its drug and alcohol misuse treatment services, based on an assessment of local need. The contract will be greater than £2m, therefore there is the need to ask Cabinet to delegate the expenditure to the Director of Public Health.</p> <p>(W. Pattison/John Liddell M: 07929 775559)</p>	<p>H&W OSC 6 December 2022</p>	<p>10 January 2023</p>
<p>Budget 2023-24 and Medium Term Financial Plan 2023-27</p> <p>The report presents the updated Budget 2023-24 and Medium Term Financial Plan 2023-27 to Cabinet following the receipt of the provisional local government settlement which is due to be announced during December 2022. The</p>	<p>Corporate Services and Economic Growth OSC 13 February 2022</p>	<p>14 February 2022 Council 22 February 2022</p>

report will also include an update on the deliverability of savings. (R. Wearmouth/A. Elsdon 01670 622168)		
Revenues and Benefits Policies for 2023/24 The report sets out the policies that the Revenues and Benefits services operate for the administration of council tax, business rates, housing benefit and council tax support. The report is for information and approval of any updates or legislation changes that need to be made. The policies need County Council approval on 22 February 2023. (R. Wearmouth/G. Barnes 01670 624351)		14 February 2022 Council 22 February 2022
Financial Performance 2022-23 - Position at the end of December 2022 The report will provide Cabinet with the revenue and capital financial performance against budget as at 31 December 2022. (R. Wearmouth/K. Harvey - 01670 624783)	N/A	14 March 2023
Financial Performance 2022-23 – Position at the end of March 2023 (Provisional Outturn) The report will provide Cabinet with the revenue and capital financial performance against budget as at 31 March 2023 (provisional outturn) (R. Wearmouth/K. Harvey - 01670 624783)	N/A	9 May 2023

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Northumberland County Council

CABINET

DATE: 17th November 2022

Outcomes of Statutory Consultation on Proposals for the Coquet Partnership

Report of Joint Interim Director of Children's Services: Audrey Kingham

Cabinet Member: Guy Renner Thompson

Report Prepared By: Sue Aviston

Purpose of Report

This report sets out an analysis of the representations and responses received from interested parties and stakeholders during the four-week statutory consultation, which commenced on 22 September and closed on 20 October 2022, in relation to proposals for the Coquet Partnership. The report also sets out an analysis of the responses received to the four-week statutory consultation in relation to proposals for Barndale House Special School, which was also published 22 September 2022 and closed on 20 October 2022. The two published statutory proposals set out the following proposed prescribed changes to the schools within the Coquet partnership and to Barndale House Special School:

- Extend the age range, from 9 years to 11 years, for Amble First School, Amble Links First School, Broomhill First School, Red Row First School and Grange View First School from 1st September 2024.
- Reducing the age range, from 9 to 18 years to 11 to 18 years, for James Calvert Spence College commencing on 1st September 2024.
- To create a satellite provision of Barndale House School on the South Avenue, Amble site from 1st September 2024.
- Increase the planned pupil numbers at Barndale House School from 60 to 110 from 1st September 2024.

Cabinet is asked to make a final decision on whether or not to approve the prescribed changes for schools in the Coquet Partnership and for Barndale House Special School, as set out in the Statutory Proposals, for implementation with effect from 1st September 2024. At the same time, Cabinet is requested to consider and approve the non-statutory proposal to extend the age range of Grange View Church of England First Schools with effect from 1st September 2024 as it is linked to the other proposals outlined above.

Recommendations

The Committee is recommended:

- 1) In the light of the prescribed changes and the non-statutory changes set out in the statutory proposal published on 22 September 2022 for schools in the Coquet Partnership and all the information provided in this report (taking into account the Statutory Guidance from the Department for Education's (DfE) *'Statutory Guidance for proposers and decision-makers: Making significant changes ('prescribed alterations') to maintained schools* attached at Appendix 4, agree to:
- Approve the Council's statutory proposal to extend the age range of Amble First School from an age 4-9 first school to an age 4-11 primary school and the non-statutory proposal to relocate the school to the part of the current site of James Calvert Spence College, South Avenue, Amble with effect from 1 September 2024;
 - Approve the Council's statutory proposals to extend the age range of Amble Links First School from an age 2-9 first school to an age 2-11 primary school and expand the school building with effect from 1 September 2024;
 - Approve the Council's statutory proposals to extend the age range of Broomhill First School from an age 3-9 first school to an age 3-11 primary school and expand the school building with effect from 1 September 2024;
 - Approve the Council's statutory proposals to extend the age range of Red Row First School from an age 3-9 first school to an age 3-11 primary school and expand the school building with effect from 1 September 2024;
 - Approve the Council's proposals to reduce the age range of James Calvert Spence College from an age 9-18 school to an age 11-18 secondary school with effect from 1 September 2025;

All of the above conditional upon

- the granting of planning permission by 31 August 2024 in relation to the proposed building works at Amble Links, Broomhill and Red Row First Schools, proposed buildings works for Amble First School at the current site of James Calvert Spence College, South Avenue site and in relation to the construction and refurbishment of the new school buildings for James Calvert Spence College.
- 2) In the light of the non-statutory changes included in the above statutory proposal for information in relation to Grange View Church of England Voluntary Controlled First School, agree to
- Approve the Council's non-statutory proposals to extend the age range of Grange View Church of England Voluntary Controlled First School from an age 3-9 first school to an age 3-11 primary school and extend the school building with effect from 1 September 2024;
- 3) In the light of all the information provided in this report and taking into account the Statutory Guidance from the Department for Education's (DfE) *'Statutory Guidance for proposers and decision-makers: Making significant changes ('prescribed alterations') to maintained schools* attached at Appendix 4, approve for implementation the following prescribed changes as set out in the statutory proposal for Barndale House Special School published on 22 September 2022;
- Increase the number of pupil places at Barndale House Special School by 50 places from 60 to 110 places for children and young people diagnosed with

special educational needs, primarily those with Autistic Spectrum Disorder (ASD), Social, Emotional and Mental Health (SEMH), Speech Language and Communication (SLCN) and Moderate Learning Difficulties (MLD)

- To facilitate the above increase in planned places, create a satellite site of Barndale Special School to be located within part of the current James Calvert Spence College, South Avenue site in Amble.

The above conditional upon the granting of planning permission in relation to the proposed buildings works for Barndale House Special School at the current site of James Calvert Spence College by 31 August 2024.

- 4) Approve the allocation of £39.06m from the funding sources set out at para. 38, Table 6 towards the capital costs required to support the implementation of the prescribed changes set out in Recommendation 5 and 7 above. Full details of the capital costs required for implementation are set out at paras. 38. to 40.
- 5) Approve the Outline Business Case contained as Appendix 3 to allow the project to progress with option 5 as the preferred option to detailed design, procurement and submission of a planning application for the project. Note the outcomes of the procurement exercise will be reported back to Cabinet in the form of a Final Business Case (FBC) in order to seek final approval for the award of contract programmed for October 2023.
- 6) When formulating its decision, Cabinet is recommended to take into account:
 - The responses received to the Statutory Proposals and the commentary contained within this report at paras. 18-19.
 - The implications of the proposals on schools and the local community as set out in the Statutory Proposals attached at Appendix 1 and 2.
 - The implications for Home to School Transport of the statutory proposals as set out in this report.
 - The Outline Business case for James Calvert Spence College attached at Appendix 3.
 - The need to review Cabinet's capital investment in schools in the Coquet Partnership and the potential impact on the building solution for the satellite site of Barndale House Special School should it decide not to approve the proposal to reorganise the schools to a 2-tier(primary/secondary) structure.

Link to Corporate Plan

These proposals are most closely linked to the Council's priority for Learning (achieving and realising potential), but it is also strongly linked with the priority for Connecting (having access to the things you need).

Key Issues

1. At its 21st September 2022 meeting, Cabinet approved the publication of statutory proposals on 22nd September 2022 setting out prescribed changes to re-organise the Coquet Partnership to a 2-tier (primary/secondary) system of education as well as the proposal to provide additional specialist SEND places within the Coquet Partnership to take effect from 1st September 2024. This decision was made following a six-week

informal consultation which took place between 11th May and 29th June 2022 (all during school term-time).

2. The rationale for the proposals and the outcomes of the informal consultation are set out in the report of the Joint Interim Director of Children's Services dated 21st September 2022 and included in the Background Papers to this report. A summary of the informal consultation is provided in paras. 9-13 of this report.
3. The statutory proposal was published on the Council's website and a brief notice placed in the Northumberland Gazette on 22 September 2022 in line with the statutory guidance set out in the DfE's '*Statutory Guidance for Proposers and Decision-Makers: Making significant changes ('prescribed alterations') to maintained schools*' which is attached as Appendix 4. Copies of the statutory proposals were sent to the required interested parties set out in the guidance within one week of the publication. The publication of the statutory proposal opened a four-week period of formal statutory consultation that closed at midnight on 20 October 2022. During that time all interested parties were invited to submit comments, in the form of written representations, including support for or objections to the proposals by the required deadline of midnight on 20 October 2022 in line with the statutory requirements. No meetings on formally published proposals take place during the statutory period.
4. Nine representations were received, in response to the Statutory Proposal by the deadline, and fell into the following groups:
 - 7 Governing Bodies of schools within the Coquet Partnership
 - Governing Body of Barndale House School
 - Newcastle Diocesan Education Board
5. The representations received have been taken into account by officers when forming the recommendations set out in this report. The main comments and themes submitted in the representations during the statutory period are set out paras. 18-19 of this report with commentary, while the full representations are included in the background papers to this report.
6. In making their decision, Cabinet are able to:
 - Reject the proposals;
 - Approve the proposal without modification;
 - Approve the proposal with modifications, having consulted the local authority and/or governing bodies (as appropriate); or
 - Approve the proposal (with or without modification) conditional upon the granting of planning permission by 31 August 2024 in relation to the proposed building works.
7. Cabinet should note that within the statutory guidance, the decision-maker is recommended to "*not simply take account of the numbers of people expressing a particular view. Instead, they should give the greatest weight to responses from those stakeholders likely to be most affected by the proposal – especially parents of children at the affected school(s).*" Cabinet should also note that the purpose of the statutory consultation was to seek the views of interested parties on a qualitative basis in relation to the robustness of the proposals educationally in order to inform the decision-making process of the Council's Cabinet. Therefore, it is not the intention that these results are

used as a referendum on the proposal. In the light of the rationale for the proposal and in consideration of feedback received during the informal consultation and the statutory period, Cabinet are recommended to approve the proposals.

8. Cabinet should note that the decision on the statutory proposals set out in this report must be made by no later than 20 December 2022 or else must be referred to the Schools Adjudicator for a decision. Furthermore, whether or not Cabinet approves the proposals set out in this report, the following bodies have the right to appeal the decision to the Schools Adjudicator within 4 weeks of the decision being made:

- The Church of England Diocese of Newcastle
- The Roman Catholic Diocese of Hexham and Newcastle
- The Governors of Grange View Church of England First School.

Should an appeal be submitted, the Schools Adjudicator would make a decision in relation to the relevant school(s) for which the appeal is submitted.

The other schools named in the statutory proposals for Coquet Partnership are community schools, as is Barndale House Special School, and as such have no rights of appeal to the Schools Adjudicator.

Background

Summary of Rationale and Informal Consultation in relation to schools in the Coquet Partnership and Barndale House Special School

9. On 10 May 2022, Cabinet approved the commencement of informal consultation on proposals to:
- change the organisation of schools in the Amble Partnership from the current first, middle and high structure to a 2-tier (primary/secondary) structure.
 - increase pupil places at Barndale House Special School, through the creation of a satellite school, in Amble.
10. The rationale for the proposals are detailed in the reports of the Executive Director of Adult Social Care and Children's Services, 10 May 2022 and the Joint Interim Director of Children's Services, 21 September 2022.

In summary, the rationale for the proposals was:

- a) The need to provide assurance to Cabinet that the allocation of funding towards the replacement/refurbishment of buildings for James Calvert Spence College approved in 2016 would be invested within a school structure that supported viable and sustainable schools at all phases of the educational journey if children and young people living in the Coquet area.
- b) To take the opportunity to include discussions of how to address the predicted growing demand for specialist provision within the Coquet area (which is symptomatic of demand across the county), especially in relation to additional provision for young people with primary needs in Social, Emotional and Mental Health and Autism. This discussion was particularly relevant in light of the Council's

objective to have appropriate educational provision for all children and young people as close to their home communities as possible.

11. Informal consultation on proposals for reorganisation of schools in the Coquet Partnership (outwith NCEA Warkworth Primary School which is already a primary) to a 2-tier, primary/secondary structure commenced and discussions on SEND provision in the Coquet Partnership area began on 11 May for six school week, concluding on 29 June 2022 in line with DfE guidance. The intention of this informal consultation was to gauge the views of all stakeholders, but especially those most affected by the proposals e.g. educational professionals and parents of pupils within the Coquet partnership of schools. Informal consultation in relation to schools is not a referendum but an opportunity to consider all views and on balance consider what is in the best educational interest of the students most impacted whilst being mindful of the impact on other stakeholders and parties.
12. Full details of the informal consultation, data analysis and commentary on feedback received from consultees are provided in the Joint Interim Director of Children's Services report dated 21st September 2022 are provided in the Background Papers to this report. In summary, feedback from consultees was as follows:
 - a) The Governing Bodies of all first and primary schools in the Coquet Partnership supported the proposal for the reorganisation of the whole partnership to a 2-tier (primary/secondary) structure;
 - b) The Governing Body of James Calvert Spence College welcomed the capital investment in schools in the partnership and committed to making whatever system of organisation was approved work for the benefit of children and young people in the Coquet area;
 - c) The Governing Body of Barndale Special School supported the opportunities for improving specialist provision across the partnership that the expansion of the school onto a satellite site in Amble would bring.
 - d) 92% of other consultees who responded supported the proposed reorganisation to a 2-tier (primary/secondary) structure across the Coquet Partnership.
13. Considering the educational rationale for the proposals, Cabinet approved the publication of the statutory proposals on 21st September 2022 as set out in the Key Issues of this report.

Representations submitted during the statutory period and commentary

14. Statutory Proposals in relation to proposals for reorganisation of schools in the Coquet Partnership and for the increased in planned pupil numbers at Barndale House Special School were drafted in accordance with The School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013 and published on the Council's website on 22 September 2022. It should also be noted that a link to a copy of the proposals for Barndale House Special School was sent directly to parents of all pupils on roll at the school as required in the relevant DfE guidance.
15. The publication of the two Statutory Proposals opened a four-week statutory period during which time interested parties were invited to submit written comments in the form of representations, either in support of or objecting to the proposals by midnight on 20 October 2022.

16. Following the publication of the statutory proposal for the schools in the Coquet Partnership, 7 representations were received each of the Governing Bodies in the partnership. In relation to the statutory proposal for Barndale House Special School, 1 representation was received, which was from the Governing Body. The Newcastle Diocesan Education Board submitted a joint representation with respect to both statutory proposals. Summaries of the representations received for each statutory proposal are set out in paras. 18 and 19.
17. As highlighted at para. 15, Cabinet should note that the purpose of the statutory consultation was to seek the views of interested parties on a qualitative basis in relation to the robustness of the proposals educationally in order to inform the decision-making process of the Council's Cabinet. Therefore, it is not the intention that these results are used as a referendum on the proposals.

Summary of representations, themes arising and commentary

18. Proposal for reorganisation of the Coquet Partnership to a 2-tier (primary/secondary) structure

Summary of Response from Amble First School's Governing Body

The Governing Body's view is that the children in the community have to be at the heart of the decision and believe that a move to two-tier is by far the most preferable for the following reasons:

- First schools have desired these changes for a number of years.
- It would allow Amble First to move to the middle school site and enable expansion.
- The change to a two-tier system fits in well with key stages.
- If approved, primary and secondary schools would continue to develop good working relationships to ensure a smooth transmission from primary to secondary.
- Disruption from Covid, and the significant impact this has had on SEMH needs, could be met in smaller more inclusive settings.
- It would address the problem of splitting a key stage, enabling all children to study the same curriculum topic within a setting which addresses repetition issues.

Commentary

The Governing Body's support of the statutory proposal for schools in the Coquet Partnership and rationale is noted.

Summary of Response from Amble Links First School's Governing Body

The Governing Body of Amble Links First School expressed unanimous support in favour of the proposals for the reorganisation of maintained schools in the Coquet partnership for the reasons summarised below:

- The completion of key stage 2 on one site which fits in with the national curriculum and other areas in the county/country.
- It would enable children to move at a point when they are more emotionally resilient.
- It would contribute to keeping children in the Coquet partnership.

- It would enable SEND children to be educated locally.
- It would provide confidence in the leadership, governance and staffs' ability to ensure high quality provision.
- It would enable the capital investment to be used for the good of all children in the partnership.
- The plans to relocate Amble First and provide separate additional SEND facilities are welcome.
- All first schools in the partnership are in favour of the changes and opportunities it brings to improve outcomes.

There were a number of points that the Governing Body wanted to have noted:

- They are keen to work with the County Council to ensure that Amble Links has excellent facilities that will support young people within the partnership for years to come.
- Should changes be agreed, the Governors hoped that proposed plans of work to school buildings are shared at the earliest opportunity.
- Points which Governors would like to be considered as part of the decision-making process eg.:
 - Current buildings to be upgraded appropriately to ensure that the infrastructure is modified to cope with the additional pupils and staff. All facilities need to be fit for purpose and work done to the highest standard.
 - Better value would be achieved by making any necessary modifications, upgrades and improvements to the school building at the same time as the addition of classrooms.
 - No one school in the partnership to appear to be better equipped or resourced than others.
 - The opportunity to have significant input into the final design of any additional buildings as the school is in the best position to understand the movement/flow of pupils and parents around the school.
 - Desire that funding will be available to schools to support initial set up costs that are unlikely to be sustainable within normal budgets. Appreciate that some resources from JCSC may follow pupils but these may not be suitable to the new Primary Schools' curriculums or buildings. It would be inappropriate and not long-term cost effective if they were furnished with unsuitable furniture and resources rather than those which will ensure excellence into the future.

Commentary

The Governing Body's support of the statutory proposal for schools in the Coquet Partnership and rationale are noted. In relation to building works required to make first school buildings suitable for the teaching and learning of Years 5 and 6, work has already been undertaken to identify the appropriate works that would be required to be undertaken at each school, with indicative costs (refer to paras. 38-40) in order to support reorganisation to a 2-tier (primary/secondary) structure. Should the proposal to reorganise schools in the Coquet Partnership be approved, Council Officers and contractors would work closely with each school to ensure that their views are reflected within the parameters of the works required to support reorganisation.

In relation to resources, it should be noted that there would be no specific revenue funding associated with the reorganisation to a 2-tier(primary/secondary structure) of schools. However, the revenue budgets of first schools becoming primary would increase as a result of having additional year groups, while the physical resources (including furniture) currently used by JCSC for Years 5 and 6 would be shared appropriate among the new primary schools. The new primary schools would also be able to allocate part of their own revenue budget towards new resources should they wish.

Summary of Response from Broomhill First School's Governing Body

It is the desire of Broomhill First School's Governing Body to offer the best possible education for pupils in the Coquet partnership, whilst reducing the number of pupils travelling into neighbouring partnership as well as ensuring the long-term viability of the schools in the partnership. The reasons are summarised as follows:

- Consistency of learning and teaching – Key Stage 2 begins in the first schools with the final two years completed in the middle school. The partnership has aimed, over the years, to work together to ensure the split learning is well-matched between first schools, so that the children are equally prepared for the transition. This has become increasingly challenging, particularly following the publication of the Ofsted Inspection Framework in 2019. Each school has worked exceptionally hard to ensure their curriculum is ambitious, vertically integrated and rigorously planned. However, the context of each school within the partnership is different and despite the relatively close geographical proximity, each school has now developed a curriculum that appropriately meets the individual needs of their unique school population. A result is that pupils complete Year 4 with a well-rounded, but nuanced, education which then presents added complexity for the middle school who must plan a curriculum that builds on this diverse range of starting points and prepare the pupils to meet the expected standard for the end of this key stage. Governors believe that each first school is best placed to continue the educational journey of pupils in their school to the end of key stage 2. In addition, the accountability for the academic and pastoral progress of each pupil lies with one establishment.
- Pupil Progress – Whilst all pupils make progress at different rates it is recognised that nationally there is an attainment gap between disadvantage and non-disadvantaged pupils. Whilst schools across the country have worked to diminish this gap, attainment and progress data across the Coquet partnership shows that the current system is negatively impacting most on pupils from socio-economically disadvantaged backgrounds. Governors believe that first/primary schools are better able to support these pupils, as pastoral intervention is more successful when deep rooted well-established relationships are already developed.
- Transition Issues – Practicalities of arranging a smooth transition, in the middle of a key stage, has historically proven difficult and continues to do so. The additional time and resources could be better used to secure positive academic and personal outcomes for pupils in their current setting.
- Earmarked Funding – Governors are grateful for the investment to improve outcomes for pupils across the partnership and to bring our educational settings up to a standard that would allow them to best prepare pupils for life in the modern world. Before this funding is formally allocated the Governors feel it is essential to consider the long-term structure of the partnership in order to meet the needs of all

pupils, including those with increasingly complex additional needs, many of whom are currently educated in settings across the county. The funding would allow all schools within the partnership to make significant improvements to their premises which would provide richer educational experiences in building that are not only fit for purpose but are also set up to extend what can be offered to our communities.

- Safety – The Governors continue to be concerned with the proximity of the school access to the busy B1330 and lack of car parking facilities. The possibility of car parking and new access point has been discussed and the Governors are more than happy to work with the Local Authority to talk about how this may be achieved in the future in order to protect the safety of children, staff and the wider community.

In summary the Governors' stated that the implementation of the primary/secondary system would:

- provide stability, consistency and continuity for pupils throughout their primary and secondary years, which is in line with the National Curriculum and end of key stage assessments;
- would remove the phase transfer in the middle of key stage 2, enabling schools to take full accountability for whole key stages;
- bring school estates up to the standard of other schools across Northumberland who have buildings fit for the 21st Century.

The Governing Body gave assurances that they had the commitment, drive and determination to make this proposal work with the support of Northumberland County Council and capital investment.

Commentary

The Governing Body's support of the statutory proposal for schools in the Coquet Partnership and its rationale are noted.

The indicative capital costs to enable the first schools in the Coquet Partnership to become primary schools have been established and are set out at para. 38, and it is these costs that Cabinet is asked to approve to support the reorganisation. Council Officers recognise the concerns of the Governing Body in relation to the school's proximity to the B1330 and should Cabinet approve the implementation of the proposal, it is confirmed that they will work with the Governing Body towards identifying a solution to improve the safety of pupils, their families and the wider community.

Summary of Response from Grange View C of E First School's Governing Body

The Governing Body want to offer the best possible education for all pupils whilst ensuring the long-term viability of schools within the partnership. In support of moving to a two-tier approach the governors provided the following rationale:

- Consistency of learning and teaching – the current key stages of the national curriculum means there is a natural break at the end of key stage two. Accountability lies with one establishment, and it avoids repetition that often happens at middle school with non-core subjects.

- Pupil Progress – partnership data shows that the current system is negatively impacting most on disadvantage pupils. Governors believe that if pupils remain in the same setting for the remainder of time in key stage 2 they are already confident and familiar with the school's procedures and teacher which would help build on prior learning.
- Parental Pressure – governors are aware of escalating parental dissatisfaction with the current system and the increasing move to a two-tier system in neighbouring partnerships. The move to a two-tier system would bring the partnership in line with the rest of the country.
- Transition Issues – historically arranging a smooth transition, whilst in the middle of a key stage, has proven difficult. The time and effort could be spent accelerating the progress of pupils in their current settings.
- Earmarked Funding – prior to investment the governors felt it was essential to consider the long-term structure of the partnership to ensure the money is spent effectively to meet the educational needs and wellbeing of the children. By becoming primary, Amble First, would require a new building and there is an opportunity to do this within the re-development of James Calvert Spence College. The Governors also welcomed, and were supportive of, the proposals for SEND provision within the partnership.

The Governing Body believed that implementation of primary/secondary would provide stability, consistency, remove phase transfer in the middle of a key stage and enable the remaining schools to take full accountability for whole key stages. Successful implementation of this system will highly likely begin to stem the flow of pupils to other schools outside the partnership.

The Governors of Grange View First School gave assurance that they have the commitment, drive and determination to make this proposal work.

Commentary

The Governing Body's support of the statutory proposal for schools in the Coquet Partnership and rationale is noted.

Summary of Response from Red Row First School's Governing Body

The Governing Body of Red Row First School confirmed that it's response to the informal consultation still stands, and that response is summarised below.

- Governors are keen for all children within Red Row, and the partnership, to receive the best education possible.
- The transition at key stage 2 has a huge impact on children and is often unsettling. At Red Row are keen to maintain and progress our children to achieve the best they can.

The Governing Body confirmed it is fully supportive of two tier.

Commentary

The Governing Body's support of the statutory proposal for schools in the Coquet Partnership and rationale is noted.

Summary of Response from NCEA Warkworth C of E Primary School's Governing Body

The Governing Body wished to add their support for the proposals for the Coquet Partnership. They believe it will bring consistency across the partnership, providing good primary education for children.

Governors are also pleased to note the inclusion of local special education provision.

Commentary

The Governing Body's support of the statutory proposal for schools in the Coquet Partnership and rationale is noted.

Summary of Response from James Calvert Spence College's Governing Body

The James Calvert Spence College's Board of Governors share a commitment to the community and their children and view the consultation on the structure of schools in the partnership as an opportunity to provide our community with the education structure that is most suited to the children now and in the future.

While the Governors are committed to the current structure of James Calvert Spence College, they understand that they must now consider other options for how education in the partnership is structured. Whatever the outcome, the Governors and James Calvert Spence College will work tirelessly to make either system a success. Their focus is to provide the best possible education for the children in our community, work for them and unite our partnership education system.

The Governors did have some operational concerns which they would like to better understand, e.g. financial implications and staffing protocol, during any transition period.

The Board of Governors have a shared commitment with our colleagues across the Coquet Partnership to the best outcome for our children and young people and to the communities we all serve.

Commentary

The Governing Body of JCSC's support of the current structure is noted, as is their commitment to working with other schools across the partnership to support whatever structure is approved to be in place in order to provide the best educational pathway for the children and young people of the Coquet area.

Summary of Response from Newcastle Diocesan Board of Education

The Board wished their previous submission to the informal stage of the consultation to be accepted as their formal response to this statutory consultation. Their response is summarised below:

- The Newcastle Diocesan Education Board (NDEB) wishes to ensure that the best local solutions are carefully looked at for the entire local community, not just the church schools and that all schools work effectively together for the benefit of all children within that community.
- The Board is supportive of the proposal to develop local specialist provision within the partnership and for it to be located within the current James Calvert Spence College building.
- The Board hoped that the outcomes will provide a clear direction for the future of the schools going forwards, ensuring the best educational interests of all of the children across the Coquet partnership can be met.

The Board fully support the move to two tier and the investment in our Church of England family of schools as well as the provision for SEND being improved in the local area based at James Calvert Spence College.

Commentary

NCEB's shared support of the Council's desire that schools work effectively together for the benefit of all children and young people in the Coquet area is welcomed, as is their support of the development of specialist provision through the creation of a satellite site of Barndale House Special School in Amble.

19. Proposal for the increase in pupil numbers at Barndale House Special School through the creation of a satellite site in Amble

The Governing Body of Barndale House School wished to reiterate the response they submitted during the period of informal consultation which is summarised as follows:

- Welcomes the local authority's enthusiasm, support and confidence in the school. It is incredibly humbling that the Coquet partnership would want to work collaboratively with our provision.
- Recognise what our role would be and the opportunities it would provide:
 - SEND hub that mainstream schools can use for CPD, intervention and outreach.
 - Bringing professional services together on a single site.
 - Children receiving support in their locality
 - Securing outcomes for SEND pupils through all Schools in Coquet partnership, and improved SEND provision in the north of Northumberland.
 - Specialist support base for those pupils needing early intervention.
- Acknowledge that whilst the proposal brings opportunities it also brings some challenges and as a Governing Body they would want to ensure that:
 - Barndale can provide an excellent quality of education over both sites in fit for purpose environments.
 - The transitional phase is transparent and allows growth at an appropriate rate.
 - Capacity is built to ensure effective strategic and operational leadership over both sites.
 - Barndale can continue to make decisions regarding the admissions of places to ensure pupils needs can be met appropriately.
 - Our pupils and parents are clear that the extended provision would not result in a move of pupils from their current peer group.

- There is sufficient capacity to build a specialist hub of services in both provisions to ensure that the locality can be supported.
- Governors are a strong body of people who have a genuine interest and personal investment in young people with SEND and as such feel their viewpoints represent the wider school community and an advocate for children and young people with SEND.

However, the governors and headteacher would have to feel confident the building could be designed/upgraded to be fit for purpose, there was adequate furniture and resources to meet the needs of pupils and the site was appropriately developed for outdoor play. The governors do have further concerns regarding recruitment, due to the current shortages regionally, but think this is something that many schools are facing.

Commentary

The Governing Body's support of the Council's statutory proposal to increase the number of pupils of Barndale House Special School through the creation of a satellite site in Amble is noted and welcomed. Their desire to grow the provision in an organised and transitional way is noted and supported by the Council. Should the proposal to create a satellite site of Barndale be approved, Council Officers and contractors would work closely with the school to ensure that the identified building is refurbished appropriate to meet the needs of this vulnerable group of children and young people.

Conclusion and Recommendation

20. Proposal for reorganisation of the Coquet Partnership to a 2-tier (primary/secondary) structure

While only representations from the schools in the Coquet Partnership and from NDEB have been received during the statutory period, all first and primary schools are supportive of the proposal to move to a 2-tier(primary/secondary) structure, while the Governing Body of JCSC has given its commitment to working closely with the other schools for the benefit of the children and young people in the Coquet area. In the absence of contrary information, it is to be assumed that parents and the wider community of the Coquet area are content for the reorganisation of their local schools to proceed.

Cabinet is therefore recommended to approve the implementation of the statutory proposal to reorganise the Coquet Partnership to a 2-tier (primary/secondary) structure with effect from 1 September 2024 (refer to Appendix 1 for the full proposal).

21. Proposal for the increase in pupil numbers at Barndale House Special School through the creation of a satellite site in Amble

Again, only the Governing Body of Barndale House Special School and NDEB have responded to the statutory proposal to create a satellite site in Amble. However, both the Governing Body and NDEB are very supportive of the proposal to create local specialist provision for children and young people with primary needs in SEMH, ASD, MLD and SLCN in the Coquet area.

Cabinet is therefore recommended to approve the implementation of the statutory proposal to increase in pupil numbers at Barndale House Special School through the creation of a satellite site in the current JCSC building at South Avenue with effect from 1 September 2024 (refer to Appendix 2 for the full proposal).

Proposed Model for school reorganisation in the Coquet Partnership

22. Current structure of school organisation in the Coquet Partnership

Table 1 - Current Structure of schools in Coquet Partnership

School	Number on Roll in Jan 2022	Capacity (net number of children able to be educated in the school building)	Forms of Entry (size of classes in each year group)	Planned Admission Number (PAN)
Amble First	108	150	1FE	30
Amble Links First	129	138	1FE	30
Broomhill First	66	75	0.5FE	15
Grange View CE First	83	150	1FE	30
Red Row First	83	120	1FE	29
*NCEA Warkworth CE Primary School	139	159	0.83FE	25
JCSC	735 inc sixth form	1058	4FE	120

*NCEA Warkworth CE Primary already has provision for pupils to the end of Year 6 but is shown in this model for completeness.

23. Proposed Model of school organisation for implementation in the Coquet Partnership

Table 2 – Proposed 2-tier (primary/secondary structure of schools in Coquet Partnership

School	Number on Roll in Jan 2022	Planned Capacity (net number of children able to be educated in the school building in Reception to Year 6)	Planned Forms of Entry (number of classes in each year group)	Planned Admission Number (PAN - number of children in each class)
Amble First	108 (150)	210	1FE	30
Amble Links First	129 (138)	210	1FE	30
Broomhill First	66 (75)	105	0.5FE	15
Grange View CE First	83 (150)	210	1FE	30
Red Row First	83 (120)	210	1FE	30
NCEA Warkworth CE Primary School	139	159	0.83FE	25
JCSC	735 inc sixth form	810	4FE	120

*NCEA Warkworth CE Primary already has provision for pupils to the end of Year 6 but is shown in this model for completeness.

Proposed Model for increase in Planned Pupil numbers for Barndale House Special School

24. In light of the lack of specialist provision currently within the Coquet Partnership area and the growing number of children and young people being diagnosed with a primary need in ASD and SEMH across the county, including in this area, it is proposed that Barndale House Special School would increase its planned pupil numbers from 60 to 110 in order to operate a satellite site in Amble. Over time, this would enable pupils with SEND who live in the Coquet area to attend provision close to their home communities in line with the Council's objectives.
25. It is proposed that the satellite site would be designated for pupils aged 4 to 16 with primary needs in ASD, SEMH, SLCN and MLD and would have capacity for 50 pupils. It is also proposed that this provision would grow in a phased and managed way and that no pupils living in the Coquet area who already attend specialist provision would be compelled to transfer to this provision.
26. In addition to the main objective of creating local specialist provision within the Coquet area, the Council also supports the objectives of the Governing Body of Barndale House Special School, as set out in their response to this consultation. As being:
- Creation of a SEND hub within the Coquet Partnership that mainstream schools can use for Continuous Professional Development, intervention and outreach.
 - Bringing professional services together on a single site.
 - Securing outcomes for SEND pupils through all schools in Coquet partnership, and improved SEND provision in the north of Northumberland.
 - Specialist support base for those pupils needing early intervention.

Education Standards and Diversity of Provision

27. Current Ofsted outcomes of schools in the Coquet Partnership

- Amble First – Good (November 2019)
- Amble Links First – Good (September 2021)
- Broomhill First – Good (March 2017)
- Red Row First – Good (December 2017)
- Grange View CE First – Good (March 2019)
- JCSC – Good (September 2022)

22. Education Outcomes of mainstream schools in Coquet Partnership

Key Stage 1 (First School Phase): Key Stage 1 (KS1) assessments, which are taken by children at the end of Year 2, are not published.

Key Stage 2 (James Calvert Spence): Key Stage 2 (KS2) assessments did not take place in 2020 and 2021 and the outcomes of individual school KS2 assessments in 2022 are not yet available. The last available data for the Coquet Partnership is from 2019 set out in Table 4.

Table 3

% Pupils meeting the expected standard in reading, writing and maths	
James Calvert Spence College	27%
Northumberland Average	66%
England Average	65%

The KS2 results achieved by JCSC in 2019 were the lowest in Northumberland, with the next lowest score achieved by a school in the county being 53%. Headline national data from the DfE indicates that for the academic year 2021/22, KS2 attainment in reading, writing and maths combined has fallen to 59%, down from 65% in 2019.

Key Stage 4 (James Calvert Spence):

The last verified outcomes at GCSE (Key Stage 4) for JCSC were in summer 2019 as set out in Table 1. The DfE has stated that due to the unprecedented change in the way GCSE results (KS4) were awarded in the summer terms of 2020 and 2021 and the resulting significant changes to the distribution of the grades received (in comparison to exam results), pupil level attainment in 2020/21 and 2019/20 is not comparable to that of the previous exam years for the purposes of measuring changes in pupil performance.

Table 4 – GCSE results, JCSC

		GCSE 2019
Progress 8 (0 = Expected Progress)	JCSC	-0.02
	Northumberland average	-0.12
	England average	-0.03
%Achieving Grade 5+ inc Eng and Maths	JCSC	38%
	Northumberland average	43%
	England average	43%
Attainment 8 (higher figure is best)	JCSC	45.5
	Northumberland average	46.5
	England average	46.7

JSCS's results in 2019 at GCSE are stronger in comparison at both county and national (England) level, being positioned 11th out of 16 high/secondary schools in Northumberland at that point.

28. Diversity of Provision

In relation to the statutory proposal to reorganise all mainstream schools in the Coquet Partnership to a 2-tier (primary/secondary, the current diversity of provision would remain in place as there are no proposals to close any schools or any proposals to change the character of any schools. The overall premise of the proposal to increase standards across the partnership and provide viable and sustainable schools through the retention of increasing numbers of local students within the Coquet educational pathway.

The proposal to increase the number of planned places of Barndale House Special School through the creation of a satellite site at Amble would increase diversity of provision in the partnership as there is currently no specialist provision located within the Coquet area.

Equal Opportunities Issues

29. The Equalities Impact Assessment which considers the impact of the statutory proposals to reorganise schools in the Coquet Partnership and to increase planned pupil numbers at Barndale House Special School is included at Appendix 5 of this report.

Overall, the equality analysis for both statutory proposals did not identify any potential for discrimination or adverse impact and all opportunities to promote equality have been taken. Furthermore, the equality analysis did identify a number of positive impacts of the proposals.

Community Cohesion

30. It is envisaged that children and young people living in the Coquet area would continue to learn about other cultures, faiths and communities through implementation of a broad and balanced curriculum in their schools.

The implementation of specialist provision within the Coquet Partnership would provide an opportunity for children and young people in mainstream schools in the area to gain a broader understanding of students who have additional needs which would benefit them all.

Transport, Travel and Accessibility

31. Eligibility for Home to School Transport in Northumberland is arranged in accordance with the Council's Home to School Transport Policy.

The statutory proposal to reorganise the schools in the Coquet Partnership to a 2-tier (primary/secondary) structure would enable pupils in the primary years to stay longer within their local village schools and communities as they would be retained into Years 5 and 6. These pupils would therefore have shorter journey times to school during those years which would be beneficial, as well as there being a small saving to the Council's home to school potentially.

In relation to the increase of planned pupil numbers of Barndale House Special School, the primary reason for the statutory proposal is to create specialist provision within the Coquet Partnership area in order to provide an appropriate education to this group of vulnerable students as close as possible to their home communities. However, an additional benefit of this proposal is that it would reduce the costs of the Council's Home to School Transport budget simply by enabling students to access their education more locally.

Implementation Plan and Timeline

32. Reorganisation of schools in the Coquet Partnership and timeline

Amble First, Amble Links First, Broomhill First, and Red Row First Schools and Grange View Church of England Voluntary Controlled School would extend their age ranges and reorganise to become primary schools with effect from 1 September 2024 in a phased way. The schools would retain Year 5 in September 2024 and would then retain Year 6 in September 2025.

JCSC would reduce its age range in a phased way with effect from September 2024. The school would not receive a Year 5 intake in September 2024 at which point it would have an interim age range of 10-18 years, and then from September 2025 and subsequent years the school would have a final age range of 11 to 18 years, with transition into Year 7 only from that point. However, parents would be able to apply for a place at any other appropriate school according to parental preference, subject to a place being available.

If this statutory proposal is approved, the further detailed work on building costs outlined previously would begin immediately in order to work towards proposed works to first schools being completed in time for the first phase of reorganisation in September 2024. Capital funding for the replacement/ refurbishment of the JCSC buildings is neither dependent on nor would it preclude the implementation of this statutory proposal. As stated previously, the Outline Business Case for the proposed building solution for JCSC approval by Cabinet is included in the Background Papers to this report.

The following timeline relates to the implementation of the above implementation plan:

Amble, Amble Links, Broomhill, Red Row and Grange View CE First Schools

1 September 2024

- Pupils in Year 4 on 31 August 2024 in all the above first schools would be retained by their new primary schools as the new Year 5.

1 September 2025

- Pupils in Year 5 on 31 August 2025 in all the above first schools would be retained by their new primary schools as the new Year 6.

1 September 2026

- Pupils in Year 6 in these primary schools on 31 August 2026 would transfer as the new Year 7 to JCSC, or to another school providing education in those year groups according to parental preference.

JCSC

5 June 2023

- From 5 June 2023 (or as near as reasonably practicable), students in Years 5 and 6 located at the South Avenue site of JCSC (and students in Years 7 and 8 if located at South Avenue at that time) would relocate to the Acklington Road site into suitable accommodation.

1 September 2023

- Students on roll at first schools on 31 August 2023 would transfer as usual into Year 5 at JCSC but would be located at the Acklington Road site.

- Students on roll in Years 5, 6 and 7 at JCSC on 31 August 2023 would transfer into Years 6,7 and 8 at the school and would remain located at the Acklington Road site.

1 September 2024

- The school would not receive a Year 5 intake and would operate with Year 6 to Year 13 only.

1 September 2025

- Students in Year 6 on 31 August 2025 in JCSC would transfer into Year 7.
- JCSC would have intakes into Year 7 only from this date onwards.

33. Barndale House Special School – increase in planned pupil numbers through creation of satellite site in Amble

Barndale House School would increase its pupil numbers through expansion onto the satellite site within the current JCSC building at South Avenue, Amble with effect from 1 September 2024. Under this proposal, the school would admit up to 50 additional pupils onto the school roll to be based at the satellite school at South Avenue in Amble in a phased way from 1 September 2024.

Implications for Staff

34. Proposal for reorganisation of the Coquet Partnership to a 2-tier (primary/secondary) structure

Should Cabinet approve the reorganisation of the Coquet Partnership to 2-tier structure the first schools would need to redesign their staffing structures to reflect the requirements of a primary school and there may be a need to employ additional staff for the Year 5 and 6 classes. JCSC would also need to redesign its staffing structure, if it is approved that the school becomes an 11 to 19 aged secondary school.

Council officers have worked with all schools in the Coquet Partnership to secure their agreement to a staffing protocol. The purpose of the protocol is to retain as many of the existing staff within schools as possible through transition to the 2-tier(primary/secondary) structure should Cabinet approve its implementation. An HR officer would be allocated to work with the schools in the partnership to co-ordinate the recruitment and selection process over the 3 year transition period, including management of Contact Officers appointed to assist any staff identified at risk of redundancy to secure appropriate alternative employment.

35. Proposal for the increase in pupil numbers at Barndale House Special School through the creation of a satellite site in Amble

If the creation of a satellite site for Barndale House in Amble is approved additional staff would be required to meet the needs of the additional students at the satellite site.

Catchment areas

36. In relation to the mainstream schools in the Coquet Partnership, there are no proposals to adjust the existing school catchment areas geographically. However, should Cabinet approve the implementation of the statutory proposal, as the first schools became primaries their catchment areas would extend to include Year 5 students living in the area in the first year of transition and then extend to include Year 6 students living in the area in the second year of transition.
37. Similarly, in the first year of transition to a 2-tier (primary/secondary) structure, JCSC would be the catchment school for students in Year 6 onwards and then in the second year of transition and thereafter, it would become the catchment school for students in Year 7 onwards living in the area.

Buildings

38. Building costs set out in Table 5 below are indicative and allow for construction inflation being set at the mid point of construction, however given the current market these costs are subject to change following the procurement process. Also, to note replacement mobile classroom works were already schedule at Amble First and Red Row. The estimated costs below include the replacement works in order to achieve better value through a larger tendering exercise should the reorganisation of schools goes ahead.

Table 5 – Estimate of Building costs to first schools implement reorganisation

School	Description	Indicative cost
Amble First School	Relocation to current JCSC South Avenue Site	£3.1m
Amble Links First School	Two classrooms, one group room and additional WC provision	£825k
Broomhill First School	One classroom, one group room, a Medical Inspection room and additional WC provision	£1.038m
Red Row First School	Three classrooms (includes replacement of some existing accommodation), two group rooms and additional WC provision	£1.746m
Grange View CE First School	One classroom, one group room, staff room and additional WC provision	£1.025m
James Calvert Spence	New build/refurbishment of secondary school.	£25.726m
Barndale Off Site provision	Refurbished JCSC South Avenue site.	£5.6m
Total		£39.06m

Due to the level of investment proposed for the James Calvert Spence College buildings /site, officers together with specialist technical advisers have developed an Outline Business Case that sets out the options to achieve best value for the council's investment. The Outline Business Case (OBC) attached as Appendix 3 of this report sets out the option appraisal of the 5 options considered together with a full commercial appraisal of each option which is contained in section 5 of the OBC.

The recommendation is to proceed with option 5, which is to provide a new building for James Calvert Spence College on land to the east of the recreation ground and part of the existing site as detailed within the OBC. This is denoted within the OBC as the preferred option with a recommendation to proceed through to procurement with an outturn budget as set out in the table above £25.7m.

The OBC in section 2 also sets out a full appraisal of the procurement options together with the recommended route to market which is procured through a Design and Build strategy utilising a single stage tendering procurement that is offered at the end of RIBA stage 4. The key objective for the delivery of the project is to open the new secondary school for operation from September 2025 of the preferred option identified as option 5 in the OBC.

As set out in recommendation 9 The Council's Cabinet is now recommended to approve the Outline Business Case to allow the project to progress with option 5 as the preferred option to detailed design, procurement and submission of a planning application for the project. The outcomes of the procurement exercise will be reported back to Cabinet in the form of a Final Business Case (FBC) in order to seek final approval for the award of contract programmed for October 2023.

Table 6 below sets out how the overall reorganisation would be funded if approval is given to implement the changes following the statutory process and Cabinets' final decision later in the year. The Funding below also includes increasing the value of contribution from MTFP by £2m which will be achieved by reducing the budget allocation for Astley and Whytrig new build project. This has been possible as the scope of the project was reduced when Cabinet decided not to support the closure of Seaton Sluice Middle and therefore the size of the building reduced to reflect the reduction in pupil numbers.

Table 6 – Funding breakdown to deliver Capital improvements above.

Funding Source	Value
NCC Capital (MTFP)	£27.5m (inclusive of £2m Astley savings against budget)
SEND Capital Grant	£1.5m
Capital Maintenance Grant (SCIP)	£8.46m
Basic Need	£1.6m

Total	£39.06m
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39. As noted at Recommendation 10 and 11, Cabinet are requested to approve the Outline Business Case for implementation of the proposed building replacement solution for James Calvert Spence College and the indicative construction costs included in the Appendix 3 to this report.
40. Cabinet is also requested to delegate the responsibility for approving the award of contract to the preferred contractor following the procurement process as laid down in the Outline Business Case to the Cabinet Member for Children and Young People and the Joint Interim Director of Children's Services, noting that a further report detailing the outcomes of the Outline Business Case would be brought to Cabinet at a later date for final approval.

Sport and Recreation

41. There would be no negative impact on the current sport and recreation facilities at the first schools proposed to become primaries under the proposed reorganisation to the 2-tier structure. However there would be a positive impact for Amble First school as they don't currently have any on site grass playfields, but when the school relocates to become a primary school to the South Avenue site the school will have access to playing grass pitches for sport.

There would be a positive impact on sport and recreation, on the James Calvert Spence College site with the proposed improvements to sports facilities for the school and the wider community including the provision of a full sized 3G pitch, new running track and enhanced access arrangements to the sports hall and changing facilities.

Implications

Policy	This report directly links to the Council's Corporate aim 'Living, Learning – We will ensure the best education standards for our children and young people.
Finance and value for money	Capital investment of £25.5m had already been allocated by the Council in the Medium-Term Plan. An updated estimate of £39.06m building costs for reorganisation of the schools in the Coquet Partnership is included at para. 38. Part of the rationale for informal consultation is to provide assurance to Cabinet that investment would be made within a sustainable and viable school structure for the medium to long-term. Due to the level of investment in JSCS buildings and site an Outline Business Case for investment is included at Appendix 3 and recommended for approval as set out in recommendation 9, which aims to have new buildings complete for September 2025.
Legal	Consultation carried out on proposals has complied with School Organisation guidance and regulations.
Procurement	An outline business case (OBC) has been developed and is included in the Background Papers to this report for Cabinet approval - the OBC also sets out the procurement options and recommendations to deliver best value for the Council's investment.

Human Resources	There may be some implications for staff in schools in the wider Coquet Partnership should re-organisation to a Primary/Secondary structure be approved for implementation by Cabinet at a later date. If the status quo remains in place, there may be some implications for JCSCS staff should the school move onto one site. A Staffing Protocol has been agreed by the schools in the Coquet Partnership - refer to paras. 34 and 35
Property	Refer to 'Finance and Value for Money' above.
Equalities (Impact Assessment attached) Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>	An EIA has been completed for both the statutory proposal for schools in the Coquet Partnership and the statutory proposal to increase the planned places of Barndale House Special School and are attached as Appendix 5 of this report.
Risk Assessment	An initial Risk Assessment and risk register has been carried out on the construction works in order to develop the budget and programme of the project. A full project risk assessment is included in the OBC I the Background Papers to this report.
Crime & Disorder	This report has considered Section 17 (CDA) and the duty it imposes and there are no implications arising from it.
Customer Consideration	The proposal set out in this report is based upon a desire to improve outcomes for children, young people and their families in Northumberland.
Carbon reduction	It is expected that the investment in new buildings will have a positive impact on carbon reduction.
Health and Wellbeing	It is envisaged that a sustainable and resilient school system in the Coquet partnership would have a positive impact on pupils, their families and the wider community.
Wards	Amble, Druridge Bay, Amble West and Warkworth.

Background Papers

- Report of the Joint Interim Director of Children's Services – Outcomes Consultation on Proposals for the Coquet Partnership (21st September 2022).
- Report of the Executive Director of Adult Social Care and Children's Services – Proposals for the Coquet Partnership (10th May 2022).

Report Sign Off

	Full Name of Officer
Monitoring Officer/Legal	Suki Binjal
Executive Director of Finance & S151 Officer	Jan Willis
Relevant Executive Director	Audrey Kingham
Interim Chief Executive	Rob Murfin
Portfolio Holder(s)	Guy Renner-Thompson

Appendices

Appendix 1 - Statutory Proposal for the Reorganisation of schools in the Coquet Partnership

Appendix 2 - Statutory Proposal for Barndale House Special School

Appendix 3 - Outline Business Case for Capital Investment in James Calvert Spence College buildings.

Appendix 4 – DfE Statutory guidance for proposers and decision makers ‘Making significant changes (‘prescribed alterations’) to maintained schools

Appendix 5 - Equality Impact Assessment of statutory proposals for Reorganisation of schools in the Coquet Partnership and Barndale House Special School

Author and Contact Details

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NORTHUMBERLAND COUNTY COUNCIL**STATUTORY PROPOSALS FOR THE REORGANISATION OF LOCAL AUTHORITY
MAINTAINED SCHOOLS IN THE COQUET PARTNERSHIP****1. CHANGE OF AGE RANGE**

Notice is hereby given in accordance with Section 19(1) of the Education and Inspections Act 2006, that Northumberland County Council, County Hall, Morpeth, Northumberland NE61 2EF, intends to make the following prescribed alterations to the schools below:

- a) **Amble First School**, Edwin Street, Amble, Morpeth, Northumberland, NE65 0EF by changing the age range of the school.
 - The current age range of Amble First School is 4 years to 9 years. The proposed age range for the school is 4 years to 11 years to take effect from 1 September 2024.
- b) **Amble Links First School**, Links Avenue, Links Estate, Amble, Morpeth, Northumberland, NE65 0SA by changing the age range of the school.
 - The current age range of Amble Links First School is 2 years to 9 years. The proposed age range for the school is 2 years to 11 years to take effect from 1 September 2024.
- c) **Broomhill First School**, Station Road, Morpeth, Northumberland, NE65 9UT by changing the age range of the school.
 - The current age range of Broomhill First School is 3 years to 9 years. The proposed age range for the school is 3 years to 11 years to take effect from 1 September 2024.
- d) **Red Row First School**, Red Row, Morpeth, Northumberland, NE61 5AS by changing the age range of the school.
 - The current age range of Red Row First School is 3 years to 9 years. The proposed age range for the school is 3 years to 11 years to take effect from 1 September 2024.
- e) **James Calvert Spence College**, Acklington Road, Amble, Morpeth, Northumberland, NE65 0NG by changing the age range of the school.
 - The current age range of James Calvert Spence College is 9 years to 18 years.
 - The proposed interim age range for the school from 1 September 2024 until 31 August 2025 is 10 years to 18 years as it transitions to become a secondary school.
 - The proposed final age range for the school from 1 September 2025 and subsequent years is 11 years to 18 years.

For the purposes of providing further information, should Northumberland County Council decide to implement the above proposals, this decision would be made in conjunction with a decision by the Council to change the current age range of **Grange View Church of England Voluntary Controlled First School**, Grange Road, Widdrington, Morpeth, Northumberland, NE61 5LZ

from an age 3 to 9 school to an age 3 to 11 school with effect from 1 September 2024, which is not required to be part of this statutory proposal.

Further in the interest of providing further information relevant to this statutory proposal, the Council intends to replace/refurbish the current James Calvert Spence building. As set out at 1.e) above, it is the intention that James Calvert Spence College will reduce its age range over time.

2. ENLARGEMENT OF PREMISES

In order to facilitate the above proposals, notice is hereby given in accordance with Section 19(1) of the Education and Inspections Act 2006, that Northumberland County Council, County Hall, Morpeth, Northumberland, NE61 2EF, intends to make the following prescribed alterations to the schools below:

f) Amble Links First School, Links Avenue, Links Estate, Amble, Morpeth, Northumberland, NE65 0SA by permanent enlargement of the premises with effect from 1 September 2024 or as soon as practicably possible thereafter.

- The number of pupils on roll at the school in Reception to Year 4 at January 2022 was 129. The current published capacity of the school for pupils aged 4 to 9 is 138. The proposed capacity of the school is to be 210 for pupils aged 4 to 11. The current maximum number of pupils admitted at age 4 is 30. The maximum number of pupils to be admitted to the school at age 4 from 1 September 2024 and subsequent years would be 30. Nursery admission numbers would remain unchanged.

g) Red Row First School, Red Row, Morpeth, Northumberland, NE61 5AS by permanent enlargement of the premises with effect from 1 September 2024 or as soon as practicably possible thereafter.

- The number of pupils on roll at the school in Reception to Year 4 at January 2022 was 83. The current published capacity of the school for pupils aged 4 to 9 is 120. The proposed capacity of the school is to be 210 for pupils aged 4 to 11. The current maximum number of pupils admitted at age 4 is 29. The maximum number of pupils to be admitted to the school at age 4 from 1 September 2024 and subsequent years would be 30. Nursery admission numbers would remain unchanged.

h) Broomhill First School, Station Road, Morpeth, Northumberland, NE65 9UT by permanent enlargement of the premises with effect from 1 September 2024 or as soon as practicably possible thereafter.

- The number of pupils on roll at the school in Reception to Year 4 at January 2022 was 66. The current published capacity of the school for pupils aged 4 to 9 is 75. The proposed capacity of the school is to be 105 for pupils aged 4 to 11. The current maximum number of pupils admitted at age 4 is 15. The maximum number of pupils to be admitted to the school at age 4 from 1 September 2024 and subsequent years would be 15. Nursery admission numbers would remain unchanged.

3. FURTHER INFORMATION PERTINENT TO THE STATUTORY PROPOSAL

i) In the interests of providing further information relevant to this statutory proposal, it is intended that the physical capacity of Grange View Church of England Voluntary Controlled School would be expanded by the addition of one classroom to accommodate

no more than 30 pupils. in order to enable the intended change of age range (see part 1.) in line with the following changes:

- **Grange View Church of England Voluntary Controlled First School**, Grange Road, Widdrington, Morpeth, Northumberland, NE61 5LZ. The number of pupils on roll at the school in January 2022 was 83. The current published capacity of the school is 150. The proposed capacity of the school is to be 210. The current maximum number of pupils admitted at age 4 is 30. The maximum number of pupils to be admitted to the school at age 4 from 1 September 2024 and subsequent years would be 30.

- j) **It is not required** under regulations to carry out statutory consultation where the proposed new site for a school would be less than 2 miles from the main entrance of the current site. Amble First School is located less than 2 miles from the James Calvert Spence College building at South Avenue, Amble. However, in the interests of providing further information linked to this proposal, it is intended that Amble First School would transfer to the building of James Calvert Spence College located at South Avenue, Amble, Morpeth, NE65 0ND with effect from 1 September 2024 or as near to that date as practicably possible. Should this transfer be approved in conjunction with the other proposals set out in this statutory proposal, Amble First School would share its site at South Avenue with the proposed satellite site of Barndale House School. The proposal to create a satellite school for Barndale House School in Amble is set out in a separate but concurrent statutory proposal as it does not rely upon the transfer of Amble First School to the South Avenue site.

The above proposed changes to school age ranges, enlargement of school premises and transfer of site proposals (which are not required to form statutory proposals) will be considered by the decision-maker (Northumberland County Council) concurrently with this statutory proposal, as they are inextricably linked.

Copies of the full Statutory Proposal may be obtained from:

The School Organisation and Resources Team
Education and Skills
Wellbeing and Community Health Services
Northumberland County Council
County Hall
Morpeth
Northumberland
NE61 2EF

or from the Council's website at www.northumberland.gov.uk/schoolconsultations

All schools named above form part of the Coquet Partnership of schools. Amble First, Amble Links First, Broomhill First and Red Row First Schools and James Calvert Spence College are local-authority maintained community schools, and Grange View Church of England Voluntary Controlled School is a local-authority maintained voluntary-controlled school.

Objectives and reasons for proposal

The objectives of this proposal are to:

- **Change of the age ranges of:-**
 1. Amble First School, Edwin Street, Amble, Morpeth, Northumberland, NE65 0EF by changing the age range of the school. The current age range of Amble First School is 4 years to 9 years. The proposed age range for the school is 4 years to 11 years to take effect from 1 September 2024.

2. Amble Links First School, Links Avenue, Links Estate, Amble, Morpeth, Northumberland, NE65 0SA by changing the age range of the school. The current age range of Amble Links First School is 2 years to 9 years. The proposed age range for the school is 2 years to 11 years to take effect from 1 September 2024.
3. Broomhill First School, Station Road, Morpeth, Northumberland, NE65 9UT by changing the age range of the school. The current age range of Broomhill First School is 3 years to 9 years. The proposed age range for the school is 3 years to 11 years to take effect from 1 September 2024.
4. Red Row First School, Red Row, Morpeth, Northumberland, NE61 5AS by changing the age range of the school. The current age range of Red Row First School is 3 years to 9 years. The proposed age range for the school is 3 years to 11 years to take effect from 1 September 2024.
5. James Calvert Spence College, Acklington Road, Amble, Morpeth, Northumberland, NE65 0NG by changing the age range of the school. The current age range of James Calvert Spence College is 9 years to 18 years. The proposed age range for the school from 1 September 2024 until 31 August 2025 is 10 years to 18 years as it transitions to become a secondary school. The final proposed age range for the school is 11 years to 18 years to take effect from 1 September 2025.
6. For the purposes of providing further information, should Northumberland County Council decide to implement the above proposals, this decision would be made in conjunction with a decision by the Council to change the current age range of Grange View Church of England Voluntary Controlled First School, Grange Road, Widdrington, Morpeth, Northumberland, NE61 5LZ from an age 3 to 9 school to an age 3 to 11 school with effect from 1 September 2024, which is not required to be a formal part of this statutory proposal.

To facilitate the change of age ranges at the schools named above, the buildings of the following schools would be enlarged:

7. **Amble Links First School**, Links Avenue, Links Estate, Amble, Morpeth, Northumberland, NE65 0SA by permanent enlargement of the premises with effect from 1 September 2024 or as soon as practicably possible thereafter.
 - The number of pupils on roll at the school in Reception to Year 4 at January 2022 was 129. The current published capacity of the school for pupils aged 4 to 9 is 138. The proposed capacity of the school is to be 210 for pupils aged 4 to 11. The current maximum number of pupils admitted at age 4 is 30. The maximum number of pupils to be admitted to the school at age 4 from 1 September 2024 and subsequent years would be 30. Nursery admission numbers would remain unchanged.
8. **Red Row First School**, Red Row, Morpeth, Northumberland, NE61 5AS by permanent enlargement of the premises with effect from 1 September 2024 or as soon as possible thereafter.
 - The number of pupils on roll at the school in Reception to Year 4 at January 2022 was 83. The current published capacity of the school for pupils aged 4 to 9 is 120. The proposed capacity of the school is to be 210 for pupils aged 4 to 11. The current maximum number of pupils admitted at age 4 is 29. The maximum number of pupils to be admitted to the school at age 4 from 1 September 2024 and subsequent years would be 30. Nursery admission numbers would remain unchanged.
9. **Broomhill First School**, Station Road, Morpeth, Northumberland, NE65 9UT by permanent enlargement of the premises with effect from 1 September 2024 or as soon as practicably possible thereafter.
 - The number of pupils on roll at the school in Reception to Year 4 at January 2022 was 66. The current published capacity of the school for pupils aged 4

to 9 is 75. The proposed capacity of the school is to be 105 for pupils aged 4 to 11. The current maximum number of pupils admitted at age 4 is 15. The maximum number of pupils to be admitted to the school at age 4 from 1 September 2024 and subsequent years would be 15. Nursery admission numbers would remain unchanged.

The following proposed changes to school age ranges, enlargement of school premises and transfer of site (which are not required to form statutory proposals) will be considered by the decision-maker (Northumberland County Council) concurrently with this statutory proposal, as they are inextricably linked.

10. It is intended that the physical capacity of Grange View Church of England Voluntary Controlled School would be expanded by the addition of one classroom to accommodate no more than 30 pupils in order to enable the intended change of age range (see part 1.) in line with the following changes:

- Grange View Church of England Voluntary Controlled First School, Grange Road, Widdrington, Morpeth, Northumberland, NE61 5LZ. The number of pupils on roll at the school in January 2022 was 83. The current published capacity of the school is 150. The proposed capacity of the school is to be 210. The current maximum number of pupils admitted at age 4 is 30. The maximum number of pupils to be admitted to the school at age 4 from 1 September 2024 and subsequent years would be 30.

11. It is not required under regulations to carry out statutory consultation where the proposed new site for a school would be less than 2 miles from the main entrance of the current site. However, in the interests of providing further information linked to this proposal, it is intended that Amble First School would transfer to the building of James Calvert Spence College located at South Avenue, Amble, Morpeth, NE65 0ND with effect from 1 September 2024 or as near to that date as practicably possible. Amble First School is located less than 2 miles from the James Calvert Spence College building at South Avenue, Amble.

Reasons for proposal:

Pre-Consultation on proposals for reorganisation of the schools that form the Coquet Partnership in Northumberland has taken place between 11 May and 29 June 2022 (six school weeks). This consultation was promulgated for the following reasons:

- In 2016, Cabinet approved the allocation of funding towards replacement or refurbishment of JCSC buildings, while in 2022 the capital allocation in the Medium-Term Plan was increased to £25.5m towards the improvement of school buildings in the Coquet partnership as a whole. Before such capital investment is made in school buildings in the Coquet Partnership, officers recommended that Cabinet receive assurance that it would be spent on an organisational school structure that supports viable and sustainable schools at all phases of education in the area, with a view to encouraging increased numbers of parents to enrol their children in schools at all phases of the education system in the area. This is in line with the Council's objectives to provide good local education for all children and young people in the county.
- The first schools and James Calvert Spence College had written to the Council in 2019 outlining their views on the organisation of schools in the Coquet Partnership.
- On 10 May 2022, the Council therefore approved pre-consultation on a proposal for the reorganisation of schools in the Coquet Partnership to a 2-tier (primary/secondary) system.

Evidence from pre-consultation indicates that 92% of consultees (including parents, pupils and the local community) who responded were supportive of reorganisation to a 2-tier(primary/secondary) system on the basis that educational standards would improve and schools in the partnership would be more sustainable through the retention of more pupils in the partnership, and therefore viability would be improved. Furthermore, all first schools and the local Roman Catholic and Church of England Diocese supported the move to 2-tier on educational grounds, while James Calvert Spence College Governing Body said it would support whatever model was approved of implementation

Having considered feedback from consultation and the educational case for change in relation to the Coquet Partnership, the Council approved publication of this statutory proposal to extend the age ranges of Amble First, Amble Links First, Broomhill First and Red Row First Schools to take effect from 1 September 2024 and concluding on September 2025, and to reduce the age range of James Calvert Spence College in a phased way to take effect from 1 September 2024 and concluding on 1 September 2025. The Council is not required to publish a statutory proposal in relation to the extension of the age range of Grange View Church of England Voluntary Controlled First School and any decision in this regard would be made in conjunction with the outcomes of the proposals set out in this statutory proposal.

Based on the educational rationale received from Governing Bodies of schools in the Coquet Partnership and feedback received from consultees, the publication of the statutory proposals has been approved on the basis that the establishment of a primary-secondary model across the whole of the Coquet Partnership would be in the best educational interests of the current and future pupils in that area. All first schools in the partnership are currently judged to be 'Good' by Ofsted and therefore the creation of additional places in these schools through extending their age ranges is in line with DfE guidance.

Effect on other schools, academies and educational institutions in the area

NCEA Warkworth Church of England Primary School also forms part of the Coquet Partnership and reorganised to a primary structure in 2016. The reorganisation of the other schools in the partnership to a primary/secondary structure would bring conformity across the partnership and would assist parents in making preferences for schools.

It is not envisaged that the reorganisation of the Coquet Partnership wholly to a primary/secondary structure would impact on any neighbouring schools, academies or educational institutions.

Project Costs and Proposed Stages for Implementation

Should this Statutory Proposal be approved for implementation, there would be a need to carry out building works to facilitate the changes. Building costs set out in Table 1 below are indicative and would be subject to further detailed work should the proposal to reorganise schools to a 2-tier structure be approved. Also, to note replacement mobile classroom works were already scheduled at Amble First and Red Row First Schools, while the replacement of the James Calvert Spence College building was already approved in 2016 and included in the Council's Medium-Term Plan. The estimated costs below include the replacement works in order to achieve better value through a larger tendering exercise should the reorganisation of schools go ahead.

Table 1

School	Description	Indicative cost
Amble First School	Relocation to current JCSC South Avenue Site	£3.1m

Amble Links First School	Two classrooms, one group room and additional WC provision	£825k
Broomhill First School	One classroom, one group room, a Medical Inspection room and additional WC provision	£1.038m
Red Row First School	Three classrooms (includes replaces of some existing accommodation), two group rooms and additional WC provision	£1.746m
Grange View CE First School	One classroom, one group room, staff room and additional WC provision	£1.025m
James Calvert Spence	New build Secondary school.	£22.8m
Total		£30.534m

Funding Source	Value
NCC Capital (MTFP)	£27.5m
Capital Maintenance Grant (SCIP)	£1.4m
Basic Need	£1.6m
Total	£30.5m

It is envisaged that long-term value for money would be achieved by the above investment in school buildings across the Coquet Partnership as part of school reorganisation through the improvement of educational standards and the retention of increased numbers of students living in the partnership area in local schools over time, thus increasing the sustainability and viability of all schools.

Pupil Numbers and Admissions

Amble First School

As at January 2022, there were 108 pupils on roll at the school in Reception to Year 4.

The current age range of Amble First School is 4 years to 9 years and the school provides education to both boys and girls.

As at January 2022, there were no pupils on roll at the school with an Education and Healthcare plan.

Amble Links First School

As at January 2022, there were 129 pupils on roll at the school in Reception to Year 4.

The current age range of Amble Links First School is 2 years to 9 years and the school provides education to both boys and girls.

As at January 2022, the school had 1 pupil on roll with an Education and Healthcare plan.

Broomhill First School

As at January 2022, there were 66 pupils on roll at the school in Reception to Year 4.

The current age range of Broomhill First School is 3 years to 9 years and the school provides education to both boys and girls.

As at January 2022, the school had 7 pupils on roll with an Education and Healthcare plan.

Red Row First School

As at January 2022, there were 83 pupils on roll at the school in Reception to Year 4. The current age range of Red Row First School is 3 years to 9 years and the school provides education to both boys and girls.

As at January 2022, the school had 2 pupils on roll with an Education and Healthcare plan.

James Calvert Spence College

As at January 2022, there were 735 pupils on roll at the school in Year 5 to Year 13.

The current age range of James Calvert Spence College is 9 years to 18 years and the school provides education to both boys and girls.

As at January 2022, the school had 10 pupils on roll with an Education and Healthcare plan.

Grange View Church of England Voluntary Controlled First School

In the interests of providing further information, the following pupil information is provided in relation to Grange View Church of England Voluntary Controlled First School:

As at January 2022, there were 83 pupils on roll at the school in Reception to Year 4.

The current age range is 3 to 9 years and provides education to both boys and girls.

As at January 2022, the school had 1 pupil on roll with an Educational and Healthcare Plan.

Implementation.

- Amble First, Amble Links First, Broomhill First, and Red Row First Schools and Grange View Church of England Voluntary Controlled School are proposed to extend their age ranges and to reorganise to become primary schools with effect from 1 September 2024 in a phased way. The schools would retain Year 5 in September 2024 and would then retain Year 6 in September 2025.
- James Calvert Spence College is proposed to reduce its age range in a phased way with effect from September 2024. The school would not receive a Year 5 intake in September 2024 at which point it would have an interim age range of 10-18 years, and then from September 2025 and subsequent years the school would have a final age range of 11 to 18 years, with transition into Year 7 only from that point.
- However, parents would be able to apply for a place at any other appropriate school according to parental preference, subject to a place being available.
- If this statutory proposal is approved, the further detailed work on building costs outlined previously would begin immediately in order to work towards proposed works to first schools being completed in time for the first phase of reorganisation in September 2024. Capital funding for the replacement/ refurbishment of the JCSC buildings is neither dependent on nor would it preclude the implementation of this statutory proposal and would be the subject of a separate business case for approval by Cabinet. Should this statutory proposal be approved, reorganisation to a 2-tier (primary/secondary) system would be implemented as set out in the following below and the replacement of the buildings of JCSC would be as set out in the business case previously noted.

Timeline for implementation

It is proposed that the following model be implemented in accordance with the following arrangements and timeline subject to finalisation of the associated buildings programme:

*Amble, Amble Links, Broomhill, Red Row First Schools**

1 September 2024

- Pupils in Year 4 on 31 August 2024 in all the above first schools would be retained by their new primary schools as the new Year 5.

1 September 2025

- Pupils in Year 5 on 31 August 2025 in all the above first schools would be retained by their new primary schools as the new Year 6.

1 September 2026

- Pupils in Year 6 in these primary schools on 31 August 2026 would transfer as the new Year 7 to JCSC, or to another school providing education in those year groups according to parental preference.

**Note for further information - should the Council approve the statutory proposal for the above schools and at the same time approve the non-statutory proposal to change the age range of Grange View Church of England Voluntary Controlled First School, the implementation of the change for the latter school would follow the same timeline as set out above.*

James Calvert Spence College

5 June 2023

- From 5 June 2023 (or as near as reasonably practicable), students in Years 5 and 6 located at the South Avenue site of JCSC (and students in Years 7 and 8 if located at South Avenue at that time) would relocate to the Acklington Road site into suitable accommodation.

1 September 2023

- Students on roll at first schools on 31 August 2023 would transfer as usual into Year 5 at JCSC but would be located at the Acklington Road site.
- Students on roll in Years 5, 6 and 7 at JCSC on 31 August 2023 would transfer into Years 6, 7 and 8 at the school and would remain located at the Acklington Road site.

1 September 2024

- The school would not receive a Year 5 intake and would operate with Year 6 to Year 13 only.

1 September 2025

- Students in Year 6 on 31 August 2025 in JCSC would transfer into Year 7.
- JCSC would have intakes into Year 7 only from this date onwards.

Impact on the Community

As well as the envisaged improvement on educational outcomes as a result of this proposal, it is also envisaged that there would be a positive impact on the communities served by the schools in the Coquet Partnership as Amble, Red Row, Widdrington and Broomhill villages would retain their primary age children for an additional two years in Years 5 and 6.

As a result of the rebuilding and refurbishment of James Calvert Spence College, it is envisaged that there would be opportunities for increased community use of the enhanced facilities at the site.

Balance of denominational provision

There would be no impact on the balance of denominational provision as a result of this statutory proposal as none of the schools that are the subject of this statutory proposal have a religious character or are proposed to take a religious character and in any event, no schools are proposed to close.

Rural Primary Schools

Amble, Amble Links, Red Row and Broomhill First Schools are listed on the DfE's List of Designated Rural Primary Schools 2021. However, as the proposal is for these schools to extend their age range, this policy area would not be impacted.

Maintained nursery schools

The nursery provision currently provided at the first schools proposed to extend their age ranges as a result of this statutory proposal would not be affected by its implementation.

Provision for 16-19 year olds

The proposal to reduce the age range of James Calvert Spence College would not impact on the school's current provision for 16-18 year olds at the school, as the reduction of the age range would occur at the lower end of the school.

Special educational provision

Provision for pupils with SEN is already provided at the schools that are the subject of this Statutory Proposal.

- As at January 2022, there were no pupils with an Educational Health Care Plan enrolled at Amble First School.
- As at January 2022, there was 1 pupil with an Educational Health Care Plan enrolled at Amble Links First School.
- As at January 2022, there were 7 pupils with an Educational Health Care Plan enrolled at Broomhill First School.
- As at January 2022, there were 2 pupils with an Educational Health Care Plan enrolled at Red Row First School.
- As at January 2022, there were 10 pupils with an Educational Health Care Plan enrolled at James Calvert Spence College.
- In the interests of providing further information, as at January 2022, there was 1 pupil with an Educational Health Care Plan enrolled at Grange View Church of England Voluntary Controlled First School.

Continuity for current and future pupils with SEN at the above first schools would be achieved as a result of the implementation of this proposal, as pupils would stay longer in their primary schools and would transfer to the next school phase at the end of Year 6.

Also for further information, there is a separate but concurrent statutory proposal published in relation to a proposal to create a satellite provision for Barndale House School at the current South Avenue site of James Calvert Spence College in Amble. The statutory proposal for Barndale House School is not dependent on the outcome of this statutory proposal and is therefore not linked.

Travel

- Transport for all pupils affected by the proposed reorganisation should it be approved would be arranged in accordance with the Council's Home to School Transport Policy.
- Pupils transferring from Year 4 to Year 5 in September 2024 would remain in their first schools as the schools reorganise to primary status. It is envisaged that many pupils in Years 5 and 6 in the new primary schools would have shorter journeys to schools as they would be educated for an additional two years in the primary schools within their local communities.
- There would be no anticipated significant increase in car use as a result of these proposals, indeed there may be a reduction in car use as the Year 5 and 6 pupils would remain in their

Consultation

All of the applicable statutory requirements to consult on this proposal in accordance with Section 19 (1)) of the Education and Inspections Act 2006 were complied with during the pre-publication consultation period that took place during the following dates:

- 11 May to 29 June 2022

Consultees recommended in the relevant statutory guidance were consulted via a Consultation Document that was made widely available on the Council's website. Consultees included parents, staff, pupils, Governors of the impacted schools in the Coquet Partnership, local parish councils, the Church of England and Roman Catholic dioceses, early-years providers, the local MP, staff representatives (unions), and relevant neighbouring schools in other Northumberland Partnerships. A public consultation event was also held in Amble Masonic Hall on 11 June 2022. Individual meetings with staff and the Governing Bodies of schools that were proposed for change also took place during the consultation period, and a meeting was also held with the Governing Body of NCEA Warkworth Primary Academy, which forms part of the Coquet Partnership.

The meetings organised during the consultation event allowed consultees attending the opportunity to make known their views on the proposals and to suggest alternatives, which were noted and considered within the analysis of feedback. During the consultation exercise, it was made clear that the outcome of the process would not be determined by the equivalent to a simple referendum but would involve a detailed analysis of evidence put forward. A total of 125 responses were received from consultees during the informal consultation process, including alternative proposals.

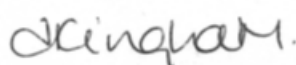
Details of the persons and parties consulted, the notes of the Governing Body and staff consultation meetings, and all views and responses received are summarised in the Joint Interim Director of Children's Services Report: Outcomes of Consultation on Proposals for the Coquet Partnership, which is available on the Council's website at [Report to Cabinet 13 September 2022](#)

Submission of Objections and Comments on Proposals

Within four weeks after the date of publication of the above proposals (**i.e. by midnight on Thursday 20 October 2022**), any person may submit comments, including support or objections to the proposals by sending their written representations to: The **Joint Interim Director of Children's Services, County Hall, Morpeth, Northumberland NE61 2EF**, or by email to educationconsultation@northumberland.gov.uk

Signature

Publication Date: 22 September 2022



Audrey Kingham
Joint Interim Director of Children's Services
Northumberland County Council
County Hall
Morpeth
Northumberland
NE61 2EF

NORTHUMBERLAND COUNTY COUNCIL

STATUTORY PROPOSAL FOR BARNDALE HOUSE SCHOOL

Notice is hereby given in accordance with Section 19(1) of the Education and Inspections Act 2006 that Northumberland County Council, County Hall, Morpeth, Northumberland NE61 2EF intends to make the following prescribed alterations to the following school:

Barndale House School

Howling Lane
Alnwick
NORTHUMBERLAND
NE66 1DQ

Barndale House School is a local authority-maintained Community Special School for boys and girls aged 2 - 19.

CHANGE IN NUMBER OF PUPILS IN A SPECIAL SCHOOL AND TO EXPAND ONTO A SATELLITE SITE

- The current number of planned pupil places at Barndale House School is 60. The proposed number of pupil places is planned to increase to 110. This increase would be achieved through the expansion of the school by 50 places onto a satellite site at the following location with effect from 1 September 2024:

Current James Calvert Spence College building
South Avenue
Amble
Morpeth
Northumberland
NE65 0ND
- In the interests of providing further information, Barndale House School would be located within part of the current James Calvert Spence College building as part of a shared site with either James Calvert Spence College (JCSC) or Amble First School. Both JCSC and Amble First School form part of a separate but concurrent statutory proposal relating to the reorganisation of the Coquet Partnership. However, this proposal is not dependent or affected by the outcome of the mainstream school organisation proposal in any way other than the Barndale satellite school may share the proposed building with one or other of these two schools.
- In the interests of providing further information, the planned type of SEN provision at the Barndale satellite school in Amble would be for students with a primary need in Autistic Spectrum Disorder (ASD), SEMH (social, emotional and mental health), speech language and communication (SLCN) and moderate learning difficulties (MLD) in response to the growing need for provision for children and young people with these needs in the area served by the Coquet Partnership of schools. Barndale House School is already designated as a provider in these areas of SEN.

Copies of the full Statutory Proposal may be obtained from:

The School Organisation and Resources Team
Education and Skills
Wellbeing and Community Health Services

Northumberland County Council
County Hall
Morpeth
Northumberland
NE61 2EF

or from the Council's website at

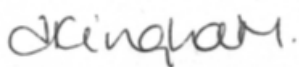
<https://www.northumberland.gov.uk/Education/Schools/Consultations.aspx#schoolconsultations>

Submission of Objections and Comments on Proposals

Within four weeks after the date of publication of the above proposals (**i.e. by midnight on Thursday 20 October 2022**), any person may submit comments, including support or objections to the proposals by sending their written representations to: The **Joint Interim Director of Children's Services, County Hall, Morpeth, Northumberland NE61 2EF**, or by email to educationconsultation@northumberland.gov.uk

Signature

Publication Date: 22 September 2022



Audrey Kingham
Joint Interim Director of Children's Services
Northumberland County Council
County Hall
Morpeth
Northumberland
NE61 2EF



Department
for Education

Making significant changes ('prescribed alterations') to maintained schools

**Statutory guidance for proposers and
decision-makers**

October 2018

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1: Summary

About this guidance

This is statutory guidance from the Department for Education. This means that recipients must have regard to it when making 'prescribed alterations' to maintained schools.

The purpose of this guidance is to ensure that good quality school places can be provided quickly where they are needed; that local authorities (LAs) and governing bodies (GBs) do not take decisions that will have a negative impact on other schools in the area; and that changes can be implemented quickly and effectively where there is a strong case for doing so. In line with these aims it is expected that, where possible, additional new places will only be provided at schools that have an overall Ofsted rating of 'good' or 'outstanding'. Schools which do not fall within the above categories should only be expanded where there are no other viable options.

A GB, LA or the [Schools Adjudicator](#) must have regard to this guidance when exercising functions under [The School Organisation \(Prescribed Alterations to Maintained Schools\) \(England\) Regulations 2013](#) ('the Prescribed Alterations Regulations'). It should be read in conjunction with Parts 2 and 3 and Schedule 3 of the [Education and Inspections Act \(EIA\) 2006](#) and the Prescribed Alterations Regulations. It also relates to the [Establishment and Discontinuance Regulations](#) and [The School Organisation \(Removal of Foundation, Reduction in the Number of Foundation Governors and Ability of Foundation to Pay Debts\) \(England\) Regulations \(2007\)](#) ('the Removal Regulations').

It is the responsibility of LAs and GBs to ensure that they act in accordance with the relevant legislation when making changes to a maintained school and they are advised to seek independent legal advice where appropriate.

Review date

This guidance will be reviewed in October 2019.

Who is this guidance for?

Those proposing to make changes and making decisions on changes to maintained schools (e.g. GBs, LAs and the Schools Adjudicator), and for information purposes for those affected by a proposal (trustees of the school, diocese or relevant diocesan board, any other relevant faith body, parents etc.).

This guidance is relevant to all categories of maintained schools (as defined in section 20 of the [School Standards and Framework Act \(SSFA\) 1998](#)), unless explicitly stated. It is not relevant to [Pupil Referral Units](#). Separate advice [on making significant changes to an academy](#) and [opening and closing a maintained school](#) is available.

Please refer to the '[Further Information](#)' section for the full website address should you be unable to access documents via the hyperlinks provided.

Terminology

Definitions of common terms used in this guidance:

Schools with a religious character - All schools designated as having a religious character in accordance with the [SSFA](#).

Foundation Trust - For the purpose of this guidance the term 'foundation trust' refers to a foundation complying with the requirements set out in section 23A of the SSFA.

Parent(s) - The Education Act 1996 defines 'parent' as including someone who has care of, or legal responsibility for, the child. Therefore, a parent can include, for example, a grandparent, other family member or foster carer if they have care of or responsibility for the child.

Main points

- All proposals for prescribed alterations must follow the processes set out in this guidance.
- Where a LA proposes to expand a school that is eligible for intervention as set out in Section 59 of the [Education and Inspections Act 2006](#), they should copy the proposal to the relevant [Regional Schools Commissioner \(RSC\)](#) at the point of publication.
- To enable the department to monitor potentially contentious proposals, the proposer should copy any proposal, which falls within the definitions set out in [part 3](#), to the School Organisation mailbox as soon as it is published schoolorganisation.notifications@education.gov.uk.
- LAs and GBs proposing to make a significant change to a school which has been designated as having a religious character should engage the trustees of the school, and in the case of Church schools the diocese or relevant

diocesan board, or any other relevant faith body, where appropriate at the earliest opportunity.

- Where a LA is the decision maker, it must make a decision within a period of two months of the end of the representation period. Where a decision is not made within this time frame, the LA must refer the proposal to the Schools Adjudicator for a decision.
- It is not possible for any school to gain, lose or change religious character through a change of category. Information on the process to be followed is available in the [opening and closing maintained schools guidance](#).
- Once a decision has been made the proposer (GB or LA) must make the necessary changes to the school's record in the department's system [Get Information About Schools](#) (GIAS) by the date the change is implemented.
- Where a school wishes to change their name, the GB will need to amend the Instrument of Government in line with regulation 30 of [The School Governance \(Constitution\) \(England\) Regulations 2012](#). Once that is done, either the school or the LA will need to update the school record in the department's GIAS system.

2: Prescribed alteration changes

Enlargement of premises (expansion)

Under section 14 of the [Education Act 1996](#), LAs have a statutory duty to ensure that there are sufficient schools for primary and secondary education in their areas. The department expects LAs to manage the school estate efficiently and to reduce or find alternative uses for surplus capacity (for example, increasing the provision of early education and childcare) to avoid detriment to schools' educational offer or financial position. LAs are encouraged to consider the use of modular construction solutions for any physical building expansion and to consider all options for the reutilisation of space including via remodelling, amalgamations, or closure where this would be the best course of action.

Where additional places are needed, including where there is a local demand for a particular category of places (for example in schools designated as having a religious character), the LA can propose an enlargement of the capacity¹ of premises.

The statutory process should be followed to enlarge premises as set out in the [Prescribed Alterations Regulations](#) (see [part 5](#)) if:

- the proposed enlargement is permanent (longer than three years) and **would increase the capacity of the school** by:
 - more than 30 pupils; **and**
 - 25% or 200 pupils (whichever is the lesser).
- the proposal involves making permanent any temporary enlargement (which was intended to be in place for no more than three years) that meets the above threshold.

GBs of all categories of mainstream schools and LAs can propose small scale expansions that do not meet the thresholds above without the need to follow the formal statutory process in [part 4](#). In many cases this can be achieved solely by increasing the school's published admissions number² (PAN); please see the [School Admissions Code](#). The thresholds do not, however, apply to special schools. Details of how special schools can increase their intake³ are covered below.

¹ Net capacity as calculated using the DfE Guidance Assessing the Net Capacity of Schools (2002).

² All admission authorities must set a published admission number (PAN) for each 'relevant age group' when they determine their admission arrangements. So, if a school has an admissions number of 120 pupils for Year 7, that is its PAN.

³ The number of pupils admitted into the school at a particular time

Examples of when mainstream schools would/would not need to publish 'enlargement' proposals

A secondary school with a capacity of 750 (5 form of entry - 30 pupils per class, 5 year groups) **could** enlarge its premises to add 1 form of entry (30 extra pupils x 5 year groups = increase of 150 pupils) bringing the capacity to 900 pupils, **without** having to publish statutory proposals. Although the increase would be by 'more than 30' pupils, it is less than '200', and also less than '25%' of the current capacity (i.e. by less than 187).

A small primary school with a capacity of 50 **could** enlarge its premises to increase its capacity by up to 29 pupils **without** having to publish statutory proposals, because although it would be more than '25%', it is less than 30.

A school of any size enlarging its premises to enable it to add 300 places **would** need to follow the statutory process as the increase would be **both** 'more than 30' **and** '200' (it may or may not be more than '25%' but that is irrelevant if the 200 threshold would be met).

A primary school with a capacity of 210 enlarging its premises to enable it to add 105 places (1.5 forms of entry $45 \times 7 = 315$), **would** need to follow the statutory process as the increase would be 'more than 30' and **more than** '25%' (it would be less than 200 but this is irrelevant as the 25% threshold would be met).

The quality of new places created through expansion

We expect LAs to consider a range of performance indicators and financial data, before deciding whether a school should be expanded. Where schools are underperforming, we would not expect them to expand, unless there is a strong case that this would help to raise standards. We expect LAs to create new places in schools that have an overall Ofsted rating of 'good' or 'outstanding'. If, however, there are no other feasible ways to create new places in the area, the LA should notify their Pupil Places Planning adviser⁴. In cases where there is a proposal to expand a school that is rated inadequate, the LA should also send a copy of the proposal to the [relevant RSC](#) so that they can ensure appropriate intervention strategies are in place.

The table below sets out who can propose an enlargement of premises and what process must be followed:

⁴ Advisers.PPP@education.gov.uk

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
LA for community	Enlargement of premises that meets the threshold	Statutory process	LA	CofE Diocese RC Diocese
LA for voluntary or foundation	Enlargement of premises that meets the threshold	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
LA for voluntary and foundation	Enlargement of premises (below the threshold)	Non statutory process	LA	N/A
GB of all categories mainstream	Enlargement of premises (below the threshold)	Non statutory process	GB	N/A

Expansion onto an additional site (or 'satellite sites')

Where proposers seek to expand onto an additional site they will need to ensure that the new provision is genuinely a change to an existing school and not in reality the establishment of a new school. Where a LA decides that a new school is needed to meet basic need, they should refer to the [guidance for opening new schools](#).

Decisions about whether a proposal represents a genuine expansion will need to be taken on a case-by-case basis, but proposers and decision makers will need to consider this non-exhaustive list of factors which are intended to expose the extent to which the new site is integrated with the existing site, and the extent to which it will serve the same community as the existing site:

The reasons for the expansion

- What is the rationale for this approach and this particular site?

Admission and curriculum arrangements

- How will the new site be used (e.g. which age groups/pupils will it serve)?
- What will the admission arrangements be?
- Will there be movement of pupils between sites?

Governance and administration

- How will whole school activities be managed?
- Will staff be employed on contracts to work on both sites? How frequently will they do so?
- What governance, leadership and management arrangements will be put in place to oversee the new site (e.g. will the new site be governed by the same GB and the same school leadership team)?

Physical characteristics of the school

- How will facilities across the two sites be used (e.g. sharing of the facilities and resources available at the two sites, such as playing fields)?
- Is the new site in an area that is easily accessible to the community that the current school serves?

The purpose of considering these factors is to determine the level of integration between the two sites; the more integration, the more likely the change will be considered as an expansion.

LAs should copy any proposal to expand a school onto a satellite site to schoolorganisation.notifications@education.gov.uk for monitoring purposes.

Expansion of existing grammar schools

Legislation prohibits the establishment of new grammar schools⁵. Expansion of any existing grammar school onto a satellite site can only happen if the new site is genuinely part of the existing school. Decision-makers must consider the factors listed above when deciding if an expansion is a legitimate enlargement of an existing school.

Changes to the published admissions number (PAN) where an enlargement of premises has not taken place

Admission authorities⁶ must set a PAN for each 'relevant age group' when determining their admission arrangements. If an admission authority of a mainstream school wishes to increase or decrease PAN, without increasing the overall physical

⁵ Except where a grammar school is replacing one of more existing grammar schools

⁶ The LA in the case of community and voluntary controlled (VC) schools or the GB in the case of voluntary aided (VA) and foundation schools

capacity of the buildings, this would be classed as an admissions change, not a prescribed alteration. The statutory process described in this guidance would not need to be followed (please see the [School Admissions Code](#) for further details of the processes admission authorities must follow).

Change in number of pupils in a special school

The School Admissions Code does not apply to special schools. GBs of all categories of special school, and LAs for community special schools, may seek to increase the number of places by following the statutory process in [part 5](#), if the increase is by:

- 10%; or
- 20 pupils (or 5 pupils if the school is a boarding-only school),

(whichever is the smaller number).

The exception to this is where a special school is established in a hospital.

GBs of all categories of special school, and LAs for community special schools, may seek to decrease the number of pupils, by following the statutory process in [part 5](#).

The table below sets out who can propose a change in the number of pupils in a special school and what process must be followed:

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
GB foundation special	Increase by 10% or 20 pupils (5 for boarding special) or decrease numbers	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB community special	Increase by 10% or 20 pupils (5 for boarding special) or decrease numbers	Statutory process	LA	CofE Diocese RC Diocese
LA for community special and foundation special	Increase by 10% or 20 pupils (5 for boarding special)	Statutory process	LA	CofE Diocese RC Diocese

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
LA for foundation special	Increase by 10% or 20 pupils (5 for boarding special)	Statutory process	LA	GB/Trustees
LA for community special	Decrease of numbers	Statutory process	LA	CofE Diocese RC Diocese

Change of age range

For changes that are expected to be in place for more than 2 years (as these are considered permanent increases):

LAs can propose:

- a change of age range of up to 2 years (except for adding or removing a sixth form) for voluntary and foundation schools by following the non-statutory process, see [part 4](#).
- a change of age range of 1 year or more for community schools (including the adding or removal of sixth form or nursery provision) and community special schools or alter the upper age limit of a foundation or voluntary school to add sixth form provision by following the statutory process, see [part 5](#).

GBs of foundation and voluntary schools can propose:

- an age range change of up to 2 years (except for adding or removing a sixth form) by following the non-statutory process, see [part 4](#).
- an age range change of 3 years or more (including adding or removing a sixth form) by following the statutory process, see [part 5](#).

Before making such a proposal, the GB should consult with LAs, and where the school is designated as having a religious character the trustees of the school, dioceses or relevant diocesan boards, or any other relevant faith body, to understand the place management needs of the area.

GBs of community schools can propose the alteration of their upper age limit to add sixth form provision following the statutory process, see [part 5](#).

GBs of community special and foundation special schools can propose a change of age range of 1 year or more following the statutory process, see [part 5](#).

Where a proposed age range change would also require an expansion of the school's premises, the LA or GB must also ensure that they act in accordance with the requirements for proposals for the [enlargement of premises](#).

In cases where the age-range of the school has changed, this should be altered on GIAS. For example if the age-range is changed so that the school no longer caters for pupils below compulsory school age, the lower age range of the school would need to be increased so as not to include that age group.

The table below sets out who can propose a change of age range and what process must be followed:

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
LA for voluntary and foundation	Alteration of upper or lower age range of up to 2 years (excluding adding or removing a sixth form)	Non statutory process	LA	NA
GB of voluntary and foundation	Alteration of upper or lower age range by up to 2 years (excluding adding or removing a sixth form)	Non statutory process	GB	N/A
GB of voluntary and foundation	Alteration of upper or lower age range by 3 years or more	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
LA for community and community special	Alteration of upper or lower age range by 1 year or more (for community schools including the adding or removal of sixth form or nurse provision)	Statutory process	LA	CofE Diocese RC Diocese
GB foundation special	Alteration of upper or lower age range by one year or more	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB community special	Alteration of upper or lower age range by one year or more	Statutory process	LA	CofE Diocese RC Diocese
LA for community	Alteration of upper age range so as to add or	Statutory process	LA	CofE Diocese RC Diocese

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
	remove sixth form provision			
LA for voluntary and foundation	Alteration of upper age range so as to add sixth form provision	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB of voluntary and foundation	Alteration of upper age range so as to add sixth form provision	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB of community	Alteration of upper age range so as to add sixth form provision	Statutory process	LA	CofE Diocese RC Diocese
GB of voluntary and foundation	Alteration of upper age range so as to remove sixth form provision	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees

Adding a sixth form

The department wants to ensure that all temporary (which is anticipated will be in place for no more than 2 years) and permanent provision is of the highest quality and provides genuine value for money. There is a departmental expectation that proposals for the addition of sixth form provision will only be put forward for secondary schools that are rated as 'good' or 'outstanding' by Ofsted. Proposers should also consider the supply of other local post-16 provision in the area and assess if there is a genuine need for the additional provision.

In deciding whether new sixth form provision would be appropriate, proposers and decision makers should consider the following guidelines:

- **Quality:** The quality of pre-16 education must be good or outstanding (as rated by Ofsted) and the school must have a history of positive Progress 8 scores (above 0);
- **Size:** The proposed sixth form will provide at least 200 places and there should be sufficient demand for those places;
- **Subject Breadth:** The proposed sixth form should - either directly or through partnership - offer a minimum of 15 A level subjects. LAs may wish to consider the benefits of delivering a broader A level curriculum through

partnership arrangements with other school sixth forms. Working with others can offer opportunities to:

- Improve choice and attainment for pupils
- Deliver new, improved or more integrated services
- Make efficiency savings through sharing costs
- Develop a stronger, more united voice
- Share knowledge and information.

Schools proposing a partnership arrangement must include evidence of how this will operate on a day-to-day basis, including timetabling and the deployment of staff;

- **Demand:** There should be a clear demand for additional post-16 places in the local area (including evidence of a shortage of post-16 places and a consideration of the quality of Level 3 provision in the area). The proposed sixth form should not create excessive surplus places or have a detrimental effect on other high quality post-16 provision in the local area;
- **Financial viability:** The proposed sixth form should be financially viable (there must be evidence of financial resilience should student numbers fall). The average class size should be at least 15, unless there is a clear educational argument to run smaller classes – for example to build the initial credibility of courses with a view to increasing class size in future.

Not all changes in age range to add a sixth form will necessitate a change to the school's admissions arrangements, for example a school may set up sixth form provision solely for its own pupils. However, if the intention is to also admit external applicants to the sixth form the school will need to adopt a sixth form PAN and may also wish to add academic entry requirements on changing its age-range.

The addition of post-16 provision requires a change of age-range, therefore, where a decision-maker is considering a proposal to add post-16 provision, they should refer to the section on changing an age range.

Closing an additional site

For foundation and voluntary schools that are already operating on a satellite site(s), GBs must follow the statutory process in [part 5](#) if they are proposing the closure of one or more sites, where the main entrance at any of the school's remaining sites is one mile or more from the main entrance of the site which is to be closed. The LA may make such a proposal for a community school following the statutory process in [part 5](#).

The table below sets out who can propose the closure of an additional site and what process must be followed:

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
LA for community	Closure of one or multiple sites	Statutory process	LA	CofE Diocese RC Diocese
GB voluntary or foundation	Closure of one or multiple sites	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees

Transfer to a new site

Where the main entrance of the proposed new site for a school would be more than two miles from the main entrance of the current school site, or if the proposed new site is within the area of another LA:

- **LAs** can propose the transfer to an entirely new site for community schools, community special schools and maintained nursery schools following the statutory process in [part 5](#).
- **GBs of voluntary, foundation, foundation special and community special** schools can also propose a transfer to a new site following the statutory process in [part 5](#).

The table below sets out who can propose a transfer to a new site and what process must be followed:

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
LA for community, community special and maintained nursery	Transfer to new site	Statutory process	LA	CofE Diocese RC Diocese
GB voluntary foundation or foundation special	Transfer to new site	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB community special	Transfer to new site	Statutory process	LA	CofE Diocese RC Diocese

Changes of category

GBs of all categories of maintained schools, apart from GBs of foundation special schools, may propose to change category by following the statutory process. The [addition or removal of a foundation](#) is described in [part 6](#). Where GBs are proposing a change of category covering a change in provision (e.g. from mainstream to special school) they are encouraged to seek advice by emailing schoolorganisation.notifications@education.gov.uk.

For a proposal to change the category of a school to voluntary-aided, the decision-maker should be satisfied that the GB and/or the foundation are able and willing to meet their financial responsibilities for building work. The decision-maker may wish to consider whether the GB has access to sufficient funds to enable it to meet 10% of its capital expenditure for at least five years from the date of implementation, taking into account anticipated building projects.

Guidance on adding or changing a designated religious character can be found in the [Opening and closing maintained schools](#) guidance.

The table below sets out who can propose a change of category and what process must be followed:

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
GB of voluntary	VC to VA VA to VC	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB of voluntary	VC or VA to foundation school VC or VA to foundation school and acquire a foundation VC or VA to foundation school, acquire a foundation and majority foundation governors on GB	Statutory process	GB	For proposals at a VA school when decided by the GB: LA CofE Diocese RC Diocese
GB of foundation	Foundation school to VC or VA	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
GB of foundation	Acquire foundation Acquire a majority of foundation governors on the GB Removal of foundation and/or reduction in majority of foundation governors on GB	Statutory process	GB	N/A
GB of community	Community to VC or VA	Statutory process	LA	CofE Diocese RC Diocese
GB of community	Community to foundation school Community to foundation school and acquire foundation Community to foundation school and acquire majority of foundation governors on GB	Statutory process	GB	N/A
GB of foundation special	Remove foundation and/or reduce majority of foundation governors on GB	Statutory process	GB	N/A

Single sex school becoming co-educational (or vice versa)

Proposers can seek to change their school from single sex to co-educational (or vice versa) when they can show that this would better serve their local community. A co-educational school cannot change its nursery or post-16 provision to single sex.

When making a decision, LAs will need to consider the demand for and balance of school places for boys and girls in line with the [Equality Act 2010](#).

The table below sets out who can change a school from single sex to co-educational (or vice versa) and what process must be followed:

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
LA for community or community special	To co-ed or single sex provision	Statutory process	LA	CofE Diocese RC Diocese
GB of foundation. foundation special or voluntary	To co-ed or single sex provision	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB of community special	To co-ed or single sex provision	Statutory process	LA	CofE Diocese RC Diocese

Mainstream school: establish/remove/alter special educational needs (SEN) provision

When considering any reorganisation of provision that the LA recognises as reserved for pupils with special educational needs, including that which might lead to children being displaced, proposers will need to demonstrate how the proposed alternative arrangements are likely to lead to improvements in the standard, quality and/or range of educational provision for those children.

The table below sets out who can propose to establish, remove or alter SEN provision and what process must be followed:

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
LA for community	Establish, remove or alter SEN provision	Statutory process	LA	CofE Diocese RC Diocese
LA for voluntary and foundation	Establish or remove SEN provision	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB of foundation	Establish, remove or alter SEN provision	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
and voluntary				

Change the types of need catered for by a special school

The table below sets out who can propose a change to the type of need catered for by a special school and what process must be followed:

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
LA for community special	Change designation and categories of SEN provision	Statutory process	LA	CofE Diocese RC Diocese
LA for foundation special	Change designation and categories of SEN provision	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB of community special	Change designation and categories of SEN provision	Statutory process	LA	CofE Diocese RC Diocese
GB of foundation special	Change designation and categories of SEN provision	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees

Boarding provision

The introduction of boarding provision can require the statutory process to be followed (depending on the type of school in question – see table below). LAs and GBs will need to consider how the Prescribed Alterations Regulations apply in conjunction with this guidance and, where there is any doubt, seek independent legal advice, as the department cannot advise on individual cases.

LAs can propose for:

- community schools; the establishment, removal or alteration (decrease by 50 pupils or 50% whichever is the greater) of boarding provision by following the statutory process in [part 5](#).

- community special schools; the establishment, removal or alteration (increase or decrease by 5 places or more where there are both day and boarding places) of boarding provision following the statutory process in [part 5](#).

GBs of voluntary and foundation schools can propose the establishment or increase of boarding provision following the non-statutory process in [part 4](#) and the removal or alteration (decrease by 50 pupils or 50% whichever is the greater) of boarding provision by following the statutory process in [part 5](#).

GBs of special schools can add or remove boarding provision or, where the school makes provision for day and boarding pupils, can increase or decrease boarding provision by five pupils or more following the statutory process in [part 5](#).

The table below sets out who can propose to establish, change or remove boarding provision and what process must be followed:

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
LA for community	Add, remove or change (decrease by 50 pupils or 50% whichever is greater) boarding provision	Statutory process	LA	CofE Diocese RC Diocese
LA for community special	Add, remove or change (increase or decrease by 5 pupils or more) boarding provision	Statutory process	LA	CofE Diocese RC Diocese
GB of foundation or voluntary	Add boarding provision	Non-statutory process	GB	N/A
GB of foundation or voluntary	Remove or change (decrease by 50 pupils or 50% whichever is greater) boarding provision	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB of foundation special	Add, remove or change (increase or decrease by 5 pupils or more) boarding provision	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB of community special	Add, remove or change (increase or decrease by 5 pupils or more) boarding provision	Statutory process	LA	CofE Diocese RC Diocese

In making a decision on a proposal to remove boarding provision from a school, the decision-maker should consider whether there is a state funded boarding school within reasonable distance from the school and whether there are satisfactory alternative boarding arrangements for those currently in the school and those who may need boarding places in the foreseeable future, including the children of service families.

Remove selective admission arrangements at a grammar school

The table below sets out who can propose the removal of selective admission arrangements⁷ and what process must be followed:

Proposer	Type of proposal	Process	Decision-maker	Right of appeal to the adjudicator
GB of voluntary or foundation	Remove selective admission arrangements	Statutory process	LA	CofE Diocese RC Diocese GB/Trustees
GB of community	Remove selective admission arrangements	Statutory process	LA	CofE Diocese RC Diocese

Amalgamations

The LA and/or GB (depending on school category) can publish a proposal to close one school (or more) and enlarge/change the age range/transfer site (following the statutory process as/when necessary) of an existing school, to accommodate the displaced pupils. The remaining school would retain its original school number, as it is not a new school, even if its phase has changed.

Alternatively, LAs may propose to close all the schools involved and replace them with a new school. For more information, please consult the separate guidance on [opening and closing a maintained school](#).

⁷ In accordance with s.109 (1) of the School Standards and Frameworks Act 1998

3: Contentious proposals

When proposing changes, LA's and GBs should act reasonably, and in line with the principles of public law, to ensure that the changes do not have a negative impact on the education of pupils in the area.

To enable the department to monitor potentially controversial proposals, LAs and GBs should notify schoolorganisation.notifications@education.gov.uk of the publication of any proposals which would:

- involve [expansion onto a separate 'satellite' site](#); or
- where objections have been raised that the proposed change could potentially undermine the quality of education in the local area by creating additional places where there is surplus capacity.

4: Changes that can be made outside of the statutory process

LAs and GBs of mainstream maintained schools can make limited changes (see [part 2](#) for the exact detail) to their schools without following a statutory process, including some temporary changes; they are nevertheless required to adhere to the usual principles of public law. They MUST:

- act rationally;
- take into account all relevant and no irrelevant considerations; and
- follow a fair procedure.

The department expects that in making these changes, LAs and GBs will work together and will:

- liaise with the trustees of the school, and in the case of schools designated as having a religious character the diocese or relevant diocesan board, or any other relevant faith body, to ensure that a proposal is aligned with wider place planning/organisational arrangements, and that any necessary consents have been gained;
- not undermine the quality of education provided or the financial viability of other 'good' and 'outstanding' schools in the local area;
- not create additional places in a local planning area where there is already surplus capacity in schools, taking the quality and diversity of the provision into account as well as cross boundary impacts; and
- ensure open and fair consultation with parents, any affected educational institutions in the area (e.g. primary, secondary, special schools, sixth form and FE colleges as required) and other interested parties. The [consultation principles guidance](#) can be referenced for examples of good practice.

Before making any changes GBs should ensure that:

- they have consulted with the LA to ensure the proposal is aligned with local place planning arrangements
- they have secured any necessary funding;
- they have identified suitable accommodation and sites;

- they have secured planning permission and/or agreement on the transfer of land where necessary⁸. The proposal can be approved subject to planning permission being granted;
- they have the consent of the site trustees or other land owner where the land is not owned by the GB;
- where a school is designated as having a religious character, they have the consent of the trustees of the school, the diocese or relevant diocesan board, or any other relevant faith body, where appropriate; and
- the admissions authority is content for the published admissions number (PAN) to be changed where this forms part of expansion plans, in accordance with the School Admissions Code.

Once a decision on the change has been made, the proposer (i.e. LA or GB) is responsible for making arrangements for the necessary changes to be made to the school's record in the department's [GIAS](#) system. These changes must be made no later than the date of implementation for the change and can be input in advance, once a decision is made.

⁸ Including, where necessary, approval from the Secretary of State for change to the use of playing field land under Section 77(1) of the SSFA 1998.

5: Statutory process: prescribed alterations

The statutory process for making prescribed alterations to schools has four stages:

Stage	Description	Timescale	Comments
Stage 1	Publication (statutory proposal/notice)		
Stage 2	Representation (formal consultation)	Must be 4 weeks	As set out in the 'Prescribed Alterations' regulations
Stage 3	Decision	LA should decide a proposal within 2 months otherwise it will fall to the Schools Adjudicator	Any appeal to the adjudicator must be made within 4 weeks of the decision
Stage 4	Implementation	No prescribed timescale	It must be as specified in the published statutory notice, subject to any modifications agreed by the decision-maker

Although there is no longer a statutory 'pre-publication' consultation period for prescribed alteration changes, there is a strong expectation that schools and LAs will consult interested parties in developing their proposal prior to publication, to take into account all relevant considerations. Schools should have the consent of the site trustees and where a school is designated as having a religious character the trustees of the school, the diocese or relevant diocesan board, or any other relevant faith body.

When considering making a prescribed alteration change, it is best practice to take timing into account, for example:

- by holding consultations and public meetings (either formal or informal) during term time, rather than school holidays and, where appropriate, extend the consultation period if it overlaps school holidays etc;
- plan where any public and stakeholder meetings are held to maximise response;
- take into account the admissions cycle for changes that will impact on the school's admission arrangements.

A number of changes can impact admissions necessitating reductions in PAN, new relevant age groups for admission or the adoption of revised admission criteria. Changes to admission arrangements can be made by the admission authority in one of two ways:

- the consultation on changing the admission arrangements (as set out in the [School Admissions Code](#)) takes place sufficiently in advance of a decision on the prescribed alteration so that the change to admissions can be implemented at the same time as the proposals; or
- a variation is sought, where necessary, in view of a major change in circumstances, from the [Schools Adjudicator](#) so that the changes to the admission policy can be implemented at the same time as the prescribed alteration is implemented.

Decision-makers should, so far as is possible, co-ordinate with the admission authority, if different, to ensure they avoid taking decisions that will reduce a PAN or remove a relevant age group for admission after parents have submitted an application for the following September (e.g. 31 October for secondary admissions or 15 January for primary admissions).

Publication

A statutory proposal must contain sufficient information for interested parties to make a decision on whether to support or challenge the proposed change. [Annex A](#) sets out the minimum that this should include. The proposal should be accessible to all interested parties and should therefore use 'plain English'.

Where the proposal for one change is linked to another, this should be made clear in any notices published. Where a proposal by a LA is 'related' to a proposal by other proposers (e.g. where one school is to be enlarged because another is being closed) a single notice could be published.

The full proposal must be published on a website (e.g. the school or LA's website) along with a statement setting out:

- how copies of the proposal may be obtained;
- that anybody can object to, or comment on, the proposal;
- the date that the representation period ends; and
- the address to which objections or comments should be submitted.

A brief notice (including details on how the full proposal can be accessed e.g. the website address) must be published in a local newspaper. If the proposal is published by a GB then notification must also be posted in a conspicuous place on the school premises and at all of the entrances to the school.

Within one week of the date of publication on the website, the proposer must send a copy of the proposal and the information set out in the paragraph above to:

- the GB/LA (as appropriate);
- the parents of every registered pupil at the school - where the school is a special school;
- if it involves or is likely to affect a school which has been designated as having a religious character:
 - the local Church of England diocese;
 - the local Roman Catholic diocese; or
 - the relevant faith group in relation to the school;
- proposals affecting a special school should go to any LA that has commissioned a place at the school (i.e. all relevant authorities who have made an out of county/borough placement there); and
- any other body or person that the proposer thinks is appropriate e.g. any affected educational institutions in the area.

Within one week of receiving a request for a copy of the proposal, the proposer must send a copy to the person requesting it.

There is no maximum limit on the time between the publication of a proposal and its proposed date of implementation. However, proposers will be expected to show good reason (for example an authority-wide reorganisation) if they propose a timescale longer than three years.

Representation (formal consultation)

The representation period must last for four weeks from the date of the publication. During this period, any person or organisation can submit comments on the proposal to the LA to be taken into account by the decision-maker. It is also good practice for representations to be forwarded to the proposer to ensure that they are aware of local opinion.

Decision

The LA will be the decision-maker in all cases except where a proposal is 'related' to another proposal that must be decided by the [Schools Adjudicator](#)⁹.

Decision-makers will need to be satisfied that the appropriate fair and open local consultation and/or representation period has been carried out and that the proposer has given full consideration to all the responses received. Decision-makers should not simply take account of the numbers of people expressing a particular view. Instead, they should give the greatest weight to responses from those stakeholders likely to be most affected by a proposal – especially parents of children at the affected school(s).

Decisions must be made within a period of two months of the end of the representation period or they must be referred to the Schools Adjudicator.

When issuing a decision, the decision-maker can:

- reject the proposal;
- approve the proposal without modification;
- approve the proposal with modifications, having consulted the LA and/or GB (as appropriate); or
- approve the proposal, with or without modification – subject to certain conditions¹⁰ (such as the granting of planning permission) being met.

A proposal can be withdrawn by the proposer at any point before a decision is taken. When doing so, the proposer must send written notice to the LA or the GB (as appropriate); or the Schools Adjudicator (if the proposal has been sent to them). A notice must also be placed on the website where the original proposal was published.

Within one week of making a decision the LA must publish their decision and the reasons for it, on the website where the original proposal was published and send copies to:

- the LA (where the Schools Adjudicator is the decision-maker);
- the Schools Adjudicator (where the LA is the decision-maker);

⁹ For example where a change is conditional on the establishment of a new school under section 10 or 11 of EIA 2006 (where the Schools Adjudicator may be the default decision maker).

¹⁰ The prescribed events are those listed in paragraph 8 of Schedule 3 to the Prescribed Alterations Regulations.

- the GB/proposers (as appropriate);
- the trustees of the school (if any);
- the local Church of England diocese;
- the local Roman Catholic diocese;
- the parents of every registered pupil at the school – where the school is a special school; and
- any other body that they think is appropriate (e.g. other relevant diocese or diocesan board, faith organisation and any affected educational institutions in the area).

If the [Schools Adjudicator](#) is the decision-maker they must notify the persons above of their decision, together with the reasons, within one week of making the decision. Within one week of receiving this notification the LA must publish the decision, with reasons, on the website where the original proposal was published.

Related proposals

Where proposals appear to be related to other proposals, the decision-maker must consider the related proposals together. A proposal should be regarded as related if its implementation (or non-implementation) would prevent or undermine the effective implementation of another proposal.

Conditional approval

For many types of proposal, decision-makers may make their approval conditional on certain prescribed kinds of events¹¹. The decision-maker must set a date by which the condition should be met but can modify the date if the proposer confirms, before the date expires, that the condition will be met later than originally thought.

The proposer should inform the decision-maker when a condition is met. If a condition is not met by the date specified, the proposal should be referred back to the decision-maker for fresh consideration.

¹¹ Under paragraph 8 of Schedule 3 to the Prescribed Alterations Regulations

Education standards and diversity of provision

Decision-makers should consider the quality and diversity of schools in the relevant area and whether the proposal will meet or affect the needs of parents, raise local standards and narrow attainment gaps.

Equal opportunities issues

The decision-maker must comply with the Public Sector Equality Duty (PSED), which requires them to have 'due regard' to the need to:

- eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act 2010;
- advance equality of opportunity between people who share a relevant protected characteristic and people who do not share it; and
- foster good relations between people who share a relevant protected characteristic and people who do not share it.

Further information on the considerations can be found on the [Equality and Human Rights Commission](#) website.

Community cohesion

Schools have a key part to play in providing opportunities for young people from different backgrounds to learn with, from, and about each other; by encouraging through their teaching, an understanding of, and respect for, other cultures, faiths and communities. When considering a proposal, the decision-maker should consider its impact on community cohesion. This will need to be considered on a case-by-case basis, taking account of the community served by the school and the views of different groups within the community.

Travel and accessibility

Decision-makers should satisfy themselves that accessibility planning has been properly taken into account and the proposed changes should not adversely impact on disadvantaged groups.

The decision-maker should bear in mind that a proposal should not unreasonably extend journey times or increase transport costs, or result in too many children being prevented from travelling sustainably due to unsuitable walking or cycling routes. A proposal should also be considered on the basis of how it will support and contribute to the LA's duty to promote the use of sustainable travel and transport to school.

Further information is available in the statutory [Home to school travel and transport guidance](#) for LAs.

Funding

The decision-maker should be satisfied that any necessary funding required to implement the proposal will be available and that all relevant local parties (e.g. trustees of the school, diocese or relevant diocesan board) have given their agreement. A proposal **cannot** be approved conditionally upon funding being made available.

Where proposers are relying on the department as the source of capital funding, there can be no assumption that the approval of a proposal will trigger the release of capital funds from the department, unless the department has previously confirmed in writing that such resources will be available; nor can any allocation 'in principle' be increased. In such circumstances the proposal should be rejected, or consideration deferred until it is clear that the capital necessary to implement the proposal will be provided.

Rights of appeal against a decision

The following bodies may appeal to the Schools Adjudicator against a decision made by a LA decision-maker, within four weeks of the decision being made:

- the local Church of England diocese;
- the local Roman Catholic diocese; and
- the governors and trustees of a foundation, foundation special or voluntary school that is subject to the proposal.

On receipt of an appeal, a LA decision-maker must then send the proposal, representations received and the reasons for their decision to the Schools Adjudicator within one week of receipt. There is no right of appeal on determinations made by the Schools Adjudicator.

Implementation

The proposer must implement a proposal in the form that it was approved, taking into account any modifications made by the decision-maker.

Modification post determination

Proposers can seek modifications from the decision-maker before the approved implementation date. However, proposals cannot be modified to the extent that new proposals are substituted for those that have been published.

Details of the modification must be published on the website where the original proposals were published.

Revocation of proposals

If the proposer no longer wants to implement an approved proposal, they must publish a revocation proposal to be relieved of the duty to implement, as set out in the Prescribed Alterations Regulations.

Land and buildings

Foundation, foundation special or voluntary controlled schools

Where a LA is required to provide a site for a foundation, foundation special or voluntary controlled school, the LA must¹²:

- transfer their interest in the site and in any buildings on the site which are to form part of the school's premises to the trustees of the school, to be held by them on trust for the purposes of the school; or
- if the school has no trustees, to the GB, to be held by that body for the purposes of the school.

In the case of a dispute as to the persons to whom the LA is required to make the transfer, the adjudicator will make a decision.

Voluntary aided schools

Where a LA is required to provide a site for a voluntary aided school, they must transfer their interest in the land to the trustees of the school, and must pay the reasonable costs to the GB in connection with the transfer.

¹² Under paragraph 17 of schedule 3 of the Prescribed Alterations Regulations

School premises and playing fields

Under the School Premises (England) Regulations 2012, all schools maintained by local authorities are required to provide suitable outdoor space in order to enable physical education to be provided to pupils in accordance with the school curriculum; and for pupils to play outside safely.

[Guidelines](#) setting out suggested areas for pitches and games courts are in place although the department has been clear that these are non-statutory.

6: Statutory process: foundation proposals

Changing category to foundation, acquiring a foundation trust and/or acquiring a foundation majority

A 'foundation trust school' is a foundation school with a charitable foundation complying with the requirements set out in SSFA 1998¹³. These include that the foundation trust must have a charitable purpose of advancing education and must promote community cohesion.

The term 'acquire a foundation majority' means acquiring an instrument of government whereby the school's foundation trust has the power to appoint a majority of governors on the GB.

Where a school's GB considers changing category to foundation or acquiring a foundation trust and/or acquiring a foundation majority on the school's GB, the following five-stage statutory process must be followed:

Stage	Description	Timescale	Comments
Stage 1	Initiation		The GB considers a change of category to foundation/acquisition of a foundation trust/acquisition of a foundation majority
Stage 2	Publication		Having gained consent where appropriate
Stage 3	Representation (formal consultation)	Must be 4 weeks	As set out in the prescribed alteration regulations. The LA may refer a foundation trust proposal to the Schools Adjudicator during this period if it considers the proposal to have a negative effect on standards at the school
Stage 4	Decision	The GB must decide within 12 months of the date of publication	Unless the LA has referred the proposal to Schools Adjudicator at Stage 3
Stage 5	Implementation	No prescribed timescale	Must be as specified in the statutory notice, subject to any modifications agreed by the decision-maker

¹³ Section 23A

Initiation

For a proposal to change the category of a school to a foundation school, the GB should inform the LA in writing, at least seven days in advance of a meeting, if a motion to consult on a change of category proposal is to be discussed.

Before the GB can publish a proposal to change category from a voluntary school to a foundation school, the existing trustees and whoever appoints the foundation governors must give their consent.

Publication

A statutory proposal must contain sufficient information for interested parties to make a decision on whether to support or challenge the proposed change. Part 1 of [Schedule 1 to the Prescribed Alterations Regulations](#) specifies the information that the statutory proposal must contain. Further details on the publication stage can be found in [Part 5](#).

Representation (formal consultation)

The representation period starts on the date of the publication of the proposal and must last four weeks. During this period, any person or organisation can submit comments on the proposal to the GB, to be taken into account when the decision is made.

During the representation period, the LA has the power to require the referral of a proposal to acquire a foundation trust/foundation majority to the [Schools Adjudicator](#) for decision, if they consider it will have a negative impact on standards at the school.

The LA does not have this power in respect of a proposal solely to change the category to foundation¹⁴.

Where a proposal is referred to the [Schools Adjudicator](#), the GB must forward any objections or comments it has received to the Schools Adjudicator within one week of the end of the representation period.

¹⁴ However, where such a proposal is related to a proposal to acquire a trust, then the whole set of proposals will be referred to the Schools Adjudicator

Decision

Unless a proposal has been referred to the Schools Adjudicator (as set out above), the GB will be the decision-maker and must make a decision on the proposal within 12 months of the date of publication of the proposal.

Where a proposal to acquire a foundation trust or a foundation majority is linked to a proposal to change category to a foundation school, they will be decided together.

When issuing a decision, the decision-maker can:

- reject the proposal;
- approve the proposal without modification;
- approve the proposal with modifications, having consulted the LA;
- approve the proposal with or without modifications but conditional upon:
 - the making of any scheme relating to any charity connected with the school; and
 - the establishment of a foundation¹⁵.

Where the LA has referred a proposal to acquire a foundation trust/foundation majority to the Schools Adjudicator for decision, any related proposal(s) (including a change of category to foundation) will also fall to be decided by the Schools Adjudicator.

Decision-makers should consider the impact of changing category to foundation school, and acquiring or removing a foundation trust on educational standards at the school. In assessing standards at the school, the decision-maker should take account of recent reports from Ofsted and a range of performance data. Recent trends in applications for places at the school (as a measure of popularity) and the local reputation of the school may also be relevant context for a decision.

If a proposal is not considered strong enough to significantly improve standards at a school that requires it, the decision maker should consider rejecting the proposal. Foundation trusts have a duty¹⁶ to promote community cohesion, and decision-makers should carefully consider the foundation trust's plans for partnership working with other schools, agencies or voluntary bodies.

¹⁵ As defined in section 23A of the SSFA 1998

¹⁶ Under section 23A(6) of the SSFA 1998

Foundation schools acquiring a foundation trust

For foundation trust schools the decision-maker should be satisfied that the following criteria are met for the proposal to be approved:

- the proposal is not seeking for a school to alter, acquire, or lose a designated religious character. These alterations cannot be made simply by acquiring a foundation trust;
- the necessary work is underway to establish the foundation trust as a charity and as a corporate body; and
- that none of the foundation trustees are disqualified from exercising the function of foundation trustee, either by virtue of:
 - o disqualifications from working with children or young people;
 - o not having obtained a criminal record check certificate¹⁷;
 - o [Charities Act 2011](#)¹⁸ which disqualify certain persons from acting as charity trustees.

Suitability of partners

Decision-makers will need to be satisfied of the suitability of foundation trust partners and members. They should use their own discretion and judgement in determining on a case-by-case basis whether the reputation of a foundation trust partner is in keeping with the charitable objectives of a foundation trust, or could bring the school into disrepute. However, the decision-maker should make a balanced judgement, considering the suitability and reputation of the current/potential foundation trust.

The following sources may provide information on the history of potential foundation trust partners:

- [The Health and Safety Executive Public Register of Convictions](#)¹⁹
- [The Charity Commission's Register of Charities](#); and
- [The Companies House web check service](#).

¹⁷ Under section 113A of the Police Act 1997

¹⁸ section 178 onwards

¹⁹ Appearance on this database should not automatically disqualify a potential trust member; decision-makers will wish to consider each case on its merits

Within one week of making a decision the GB must publish a copy of the decision (together with reasons) on the website where the original proposal was published and send copies to:

- the LA;
- the local Church of England diocese; and
- the local Roman Catholic diocese.

Where a proposal has been decided by the GB and is to change the category of a VA school to foundation (with or without the acquisition of a foundation trust/foundation majority), the following bodies have the right of appeal to the [Schools Adjudicator](#)²⁰:

- the LA;
- the local Church of England diocese(s); and
- the local Roman Catholic diocese(s).

Conditional approval

For many types of proposal, decision-makers may make their approval conditional on certain prescribed kinds of events²¹. The decision-maker must set a date by which the condition should be met but can modify the date if the proposer confirms, before the date expires, that the condition will be met later than originally thought.

The proposer should inform the decision-maker when a condition is met. If a condition is not met by the date specified, the proposal should be referred back to the decision-maker for fresh consideration.

Implementation

The GB must implement any approved proposal by the approved implementation date, taking into account any modifications made by the decision-maker.

Within one week of implementation, the GB must provide information to the Secretary of State²² about foundation proposals that have been implemented. Copies of the statutory proposals and decision record should be submitted to

²⁰ The specific circumstances in which a referral can be made are prescribed under paragraph 15 of Schedule 1 to the Prescribed Alterations Regulations

²¹ under paragraph 16 of Schedule 1 to the Prescribed Alterations Regulations

²² Paragraph 18 of Schedule 1 of the Prescribed Alterations Regulations

schoolorganisation.notifications@education.gov.uk in order for the school record to be updated on GIAS.

Modification post determination

Modifications can be made to a proposal by the governing body after determination but before implementation.

Revocation

If the proposer no longer wants to implement an approved proposal they must publish a revocation proposal to be relieved of the duty to implement, as set out in Paragraph 19 of Schedule 1 of the Prescribed Alterations Regulations.

Governance and staffing issues

Schedule 4 of the Prescribed Alterations Regulations provides further information on the requirements about:

- the revision or replacement of the school's instrument of government;
- reconstitution or replacement of the GB;
- current governors continuing in office;
- surplus governors;
- transfer of staff; and
- transitional admission arrangements.

Land transfer issues

Requirements as to land transfers, when a school changes category or acquires a foundation trust, are prescribed in Schedule 5 of the Prescribed Alterations Regulations.

Removing a foundation trust and/or removing a foundation majority

There are five or six statutory stages (depending on the proposal and circumstances) to remove a foundation trust and/or to reduce a foundation majority. It may be triggered in two different ways – either by a majority or a minority of the GB:

Stage	Description	Timescale	Comments
Stage 1	Initiation		<p>Majority A majority of governors considers publishing a proposal to remove a foundation trust/reduce the number of governors appointed by the foundation.</p> <p>or</p> <p>Minority A minority (of not less than a third of the governors) notify the clerk of the GB of their wish to publish a proposal to remove a foundation trust/reduce the number of governors appointed by the foundation</p>
Stage 2	Land Issues (applicable only to removal of trusts)	If not resolved within 3 months, disputes must be referred to the Schools Adjudicator	In cases of removing foundation trusts, the GB, trustees and the LA must resolve issues related to land and assets before a proposal is published
Stage 3	Consultation	<p>Majority A minimum of 4 weeks is recommended.</p> <p>or</p> <p>Minority No consultation required</p>	Majority It is for the GB to determine the length of consultation
Stage 4	Publication and representation	<p>Majority 6 week representation period.</p> <p>or</p> <p>Minority</p>	

Stage	Description	Timescale	Comments
		Where there are no land or asset issues – publish within 3 months of receipt of notice by GB clerk – followed by a 6-week representation period. Where there are land issues, publish within 1 month of receipt of School Adjudicator's determination – followed by a 6-week representation period	
Stage 5	Decision	Within 3 months	A proposal initiated by a minority of governors may not be rejected unless at least two-thirds of the GB are in favour of the rejection
Stage 6	Implementation	No prescribed timescale	But must be as specified in the statutory notice, subject to any modifications agreed by the decision-maker

Initiation

A proposal for removing a foundation trust and/or removing a foundation majority can be triggered by:

- a) a majority²³ of the GB or a committee deciding to publish a proposal. The decision to publish must be confirmed by the whole GB at a meeting held at least 28 days after the meeting at which the initial decision was made; or
- b) at least one-third²⁴ of the governors requesting in writing to the clerk of the GB, that a proposal be published. No vote of the GB is required as they are obliged to publish a proposal. To prevent on-going challenges

²³ Regulation 4 of the Removal Regulations

²⁴ Regulation 5 of the Removal Regulations

there are a number of prescribed circumstances²⁵ in which there is no obligation to follow the wishes of the minority of governors.

Land and assets (when removing a foundation trust)

Before publishing proposals to remove a foundation trust, the GB must reach agreement with the trustees and LA on issues relating to the school's land and assets. Where such issues remain unresolved within three months of the initial decision (majority) or receipt of notice by the clerk (minority), they must be referred to the [Schools Adjudicator](#) for determination.

On the removal of the foundation trust, all publicly provided land held by the foundation trust for the purposes of the school will transfer to the GB²⁶. Where the land originated from private sources (for example, where land was gifted on trust), the land will transfer to the GB in accordance with a transfer agreement, providing for consideration to be paid by the GB to the foundation trust where appropriate. However, there may be land which has benefited from investment from public funds which remains with the trustees under the transfer agreement.

Alternatively, there may have been investment by trustees in the publicly provided land or from public funding in the land provided by the trustees. In either of these cases, it may be appropriate for either the trustees or the public purse to be compensated. The possibility of stamp duty land tax may also need to be taken into account.

The Schools Adjudicator will announce its determination in writing to both parties.

Consultation

Where a minority of governors initiated the process, this stage does not apply.

Where a majority of governors initiated the process, before publishing a proposal the GB must consult:

- families of pupils at the school;
- teachers and other staff at the school;
- the trustees and, if different, whoever appoints foundation governors;
- the LA;

²⁵ See regulation 5(4) of the Removal Regulations

²⁶ By virtue of regulation 17(1) of the Removal Regulations

- the GBs of any other foundation or foundation special schools maintained by the same LA for which the foundation acts as a foundation;
- any trade unions who represent school staff;
- if the school has been designated as having a religious character, the appropriate diocesan authority or other relevant faith group in relation to the school;
- any other person the GB consider appropriate.

Publication

Where the decision to publish a proposal was made by a majority of governors, the GB at this stage must decide whether to go ahead with publishing the proposal.

Where the decision to publish a proposal was made by a minority of governors and there are no land issues to be determined, the GB must publish the proposal within 3 months of the receipt of the notice by the clerk. If land issues were referred to the [Schools Adjudicator](#), the proposal must be published within 1 month of receipt of its determination.

Proposals to remove a foundation trust or to alter the instrument of government so that foundation governors cease to be the majority of governors must contain the information set out in [The School Organisation \(Removal of Foundation, Reduction in Number of Foundation Governors and Ability of Foundation to Pay Debts\) \(England\) Regulations 2007](#). Further details on the publication stage can be found in [Part 5](#).

At the same time as publishing the proposals, the GB must send copies of the proposals to the LA, trustees, and the Secretary of State via schoolorganisation.notifications@education.gov.uk.

Representation

The representation period starts on the date of the publication of the proposal and must last six weeks. During this period, any person or organisation can submit comments on the proposal to the GB to be taken into account when the decision is made.

Unlike the foundation trust acquisition process, there is no power for the LA to refer a proposal to the Schools Adjudicator to remove a school's foundation trust or to reduce the number of governors appointed by the foundation trust. However, GBs

must bear in mind that failure to follow the requirements of the statutory process could lead to a complaint to the Secretary of State under Section 496/497 of the Education Act 1996, and/or ultimately be challenged through judicial review.

Decision

The GB is the decision-maker for a removal proposal and must determine the proposal within 3 months of the date of its publication.

If a proposal was brought forward by a majority of governors, then it may be determined by a majority vote of those governors present²⁷.

If a proposal was brought forward by a minority of governors, then the GB may not reject the proposal unless two thirds or more of the governors indicate that they are in favour of its rejection²⁸.

When deciding a proposal for the removal of a foundation trust, the GB should consider the proposal in the context of the original proposal to acquire the foundation trust, and consider whether the foundation trust has fulfilled its expectations. Where new information has come to light regarding the suitability of foundation trust partners, this should be considered.

All decisions must be taken in accordance with the processes prescribed in [The School Governance \(Roles, Procedures and Allowances\) \(England\) Regulations 2013](#)²⁹.

The GB must notify the relevant LA, trustees and the Secretary of State via schoolorganisation.notifications@education.gov.uk of their decision.

Implementation

The GB is under a statutory duty to implement any approved proposal, as published, by the approved implementation date, taking into account any modifications made. In changing category, an implementation period begins when the proposal is decided and ends on the date the proposal is implemented. During this period the LA and GB are required to make a new instrument of government for the school, so enough time must be built into the timeframe for this to happen. The GB must then be reconstituted in a form appropriate to the school's new category and also in accordance with the appropriate instrument of government taking into account the [School Governance \(Constitution\) \(England\) Regulations 2012](#).

²⁷ As per the School Governance (Roles, Procedures and Allowances) (England) Regulations 2013

²⁸ As per regulation 11(2) of the Removal Regulations

²⁹ Except as otherwise provided by the Removal Regulations.

When removing a foundation trust or a foundation majority, a governor may continue as a governor in the corresponding category (e.g. staff governor, parent governor) if that category remains under the new instrument of government. A member of a current GB who continues as a governor on these grounds holds office for the remainder of the term for which he or she was originally appointed or elected. Where a school with a religious character has no foundation trust, the GB must appoint partnership governors with a view to ensuring that the religious character of the school is preserved and developed in accordance with the School Governance (Constitution) (England) Regulations 2012. There is nothing to prevent the appointment of a former foundation governor being reappointed by the GB as a partnership governor.

The terms of the trust on which land is held for a voluntary or foundation school often include very specific provisions regarding the conduct of the school and the use of any fund held by the foundation trust for the use of the school and premises. When making a proposal to change category, proposers will need to consider whether the current terms on which the school's land is held on trust allows for the change in category proposed. If in doubt, or if a variation in the foundation trust is clearly necessary, promoters and the relevant site trustees are advised to make early contact with the Charity Commission to apply for the terms of the trust to be varied under the relevant trust law.

Modification of proposals

Modifications can only be made to the implementation date and the proposed constitution of the governing body.

Annex A: Information to be included in a prescribed alteration statutory proposal

A statutory proposal for making a prescribed alteration to a school must contain sufficient information for interested parties to make a decision on whether to support the proposed change. A proposal should be accessible to all interested parties and therefore use 'plain English'.

Proposers will need to be mindful of the factors that will inform the decision-makers assessment when determining the proposal.

As a minimum, the department would expect a proposal to include:

- school and LA details;
- description of alteration and evidence of demand;
- objectives (including how the proposal would increase educational standards and parental choice);
- the effect on other educational institutions within the area;
- project costs and indication of how these will be met, including how long-term value for money will be achieved;
- implementation plan; and
- a statement explaining the procedure for responses: support, objections and comments.

Annex B: Further Information

This guidance primarily relates to:

- [The School Organisation \(Prescribed Alterations to Maintained Schools\) \(England\) Regulations 2013](http://www.legislation.gov.uk/uksi/2013/3110/contents/made)
www.legislation.gov.uk/uksi/2013/3110/contents/made
- [The School Organisation \(Removal of Foundation, Reduction in Number of Foundation Governors and Ability of Foundation to Pay Debts\) \(England\) Regulations 2007](http://www.legislation.gov.uk/uksi/2007/3475/contents/made) www.legislation.gov.uk/uksi/2007/3475/contents/made
- [The School Organisation \(Requirements as to Foundations\) \(England\) Regulations 2007](http://www.legislation.gov.uk/uksi/2007/1287/contents/made) www.legislation.gov.uk/uksi/2007/1287/contents/made
- [The Education and Inspections Act 2006](http://www.legislation.gov.uk/ukpga/2006/40)
www.legislation.gov.uk/ukpga/2006/40
- [The School Standards and Framework Act 1998](http://www.legislation.gov.uk/ukpga/1998/31/contents)
www.legislation.gov.uk/ukpga/1998/31/contents

It also relates to:

- [The School Organisation \(Establishment and Discontinuance of Schools\) Regulations 2013](http://www.legislation.gov.uk/uksi/2013/3109/contents/made) www.legislation.gov.uk/uksi/2013/3109/contents/made
- [The School Governance \(Constitution\) \(England\) Regulations 2012](http://www.legislation.gov.uk/uksi/2012/1034/contents/made)
www.legislation.gov.uk/uksi/2012/1034/contents/made
- [The School Governance \(Constitution and Federations\) \(England\) \(Amendment\) Regulations 2014](http://www.legislation.gov.uk/uksi/2014/1257/pdfs/uksi_20141257_en.pdf)
www.legislation.gov.uk/uksi/2014/1257/pdfs/uksi_20141257_en.pdf
- [The School Governance \(Miscellaneous Amendments\) \(England\) Regulations 2015](http://www.legislation.gov.uk/uksi/2015/883/pdfs/uksi_20150883_en.pdf) www.legislation.gov.uk/uksi/2015/883/pdfs/uksi_20150883_en.pdf
- [The School Governance \(New Schools\) \(England\) Regulations 2007](http://www.legislation.gov.uk/uksi/2007/958/pdfs/uksi_20070958_en.pdf)
www.legislation.gov.uk/uksi/2007/958/pdfs/uksi_20070958_en.pdf
- [The School Governance \(Roles, Procedures and Allowances\) \(England\) Regulations 2013](http://www.legislation.gov.uk/uksi/2013/1624/contents/made) www.legislation.gov.uk/uksi/2013/1624/contents/made
- [The Childcare Act 2006](http://www.legislation.gov.uk/ukpga/2006/21/contents) www.legislation.gov.uk/ukpga/2006/21/contents
- [The School Premises \(England\) Regulations 2012](http://www.legislation.gov.uk/uksi/2012/1943/contents/made)
www.legislation.gov.uk/uksi/2012/1943/contents/made

- [Making Significant Changes to an Existing Academy](http://www.gov.uk/government/publications/making-significant-changes-to-an-existing-academy)
www.gov.uk/government/publications/making-significant-changes-to-an-existing-academy
- [Academy/Free School Presumption – departmental advice](http://www.gov.uk/government/publications/establishing-a-new-school-free-school-presumption)
www.gov.uk/government/publications/establishing-a-new-school-free-school-presumption
- [Establishing New Maintained Schools – departmental advice for local authorities and new school proposers](http://www.gov.uk/government/publications/establishing-new-maintained-schools)
www.gov.uk/government/publications/establishing-new-maintained-schools
- [The School Admissions Code](http://www.gov.uk/government/publications/school-admissions-code--2) www.gov.uk/government/publications/school-admissions-code--2
- [Education Act 1996](http://www.legislation.gov.uk/ukpga/1996/56/contents) www.legislation.gov.uk/ukpga/1996/56/contents
- [Equality Act 2010](http://www.legislation.gov.uk/ukpga/2010/15/contents) www.legislation.gov.uk/ukpga/2010/15/contents
- [Police Act 1997](http://www.legislation.gov.uk/ukpga/1997/50/contents) www.legislation.gov.uk/ukpga/1997/50/contents
- [Charities Act 2011](http://www.legislation.gov.uk/ukpga/2011/25/contents) www.legislation.gov.uk/ukpga/2011/25/contents
- [Public Sector Equality Duty](http://www.equalityhumanrights.com/en/advice-and-guidance/public-sector-equality-duty) www.equalityhumanrights.com/en/advice-and-guidance/public-sector-equality-duty
- [Home-to-school travel and transport - GOV.UK](http://www.gov.uk/government/publications/home-to-school-travel-and-transport-guidance)
www.gov.uk/government/publications/home-to-school-travel-and-transport-guidance
- [Get information about schools - GOV.UK](http://www.get-information-schools.service.gov.uk/) www.get-information-schools.service.gov.uk/
- [Consultation principles: guidance - GOV.UK](http://www.gov.uk/government/publications/consultation-principles-guidance)
www.gov.uk/government/publications/consultation-principles-guidance
- [School land and property: protection, transfer and disposal - GOV.UK](http://www.gov.uk/guidance/school-land-and-property-protection-transfer-and-disposal)
www.gov.uk/guidance/school-land-and-property-protection-transfer-and-disposal

Annex C: Contact details for RSC offices

- East and North East London - RSC.EASTNELONDON@education.gov.uk
- North - RSC.NORTH@education.gov.uk
- East Midlands and Humber - EMH.RSC@education.gov.uk
- Lancashire and West Yorkshire - LWY.RSC@education.gov.uk
- South Central England and North West London - RSC.SCNWLON@education.gov.uk
- South East and South London - RSC.SESL@education.gov.uk
- South West - RSC.SW@education.gov.uk
- West Midlands - RSC.WM@education.gov.uk

Equality Impact Assessment

To be completed for all key changes, decisions and proposals. Cite specific data and consultation evidence wherever possible. Further guidance is available at: <http://www.northumberland.gov.uk/default.aspx?page=3281>

Duties which need to be considered:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act
- Advance equality of opportunity between people who share a protected characteristic and those who do not
- Foster good relations between people who share a protected characteristic and those who do not

PART 1 – Overview of the change, decision or proposal

1) Title of the change, decision or proposal:

a) Proposals for the reorganisation of the Coquet Partnership of schools from the current structure to a 2-tier (primary/secondary) structure.

2) Brief description of the change, decision or proposal:

Informal consultation on proposals for schools in the Coquet Partnership (with the exception of NCEA Warkworth CE Primary School which has previously reorganised) to reorganise to a 2-tier (primary/secondary) system of education has taken place with all relevant stakeholders, including parents of pupils on roll at schools in the partnership, staff of those schools, Governors of the schools, relevant parish/town council and pupils/students. Statutory consultation was approved by the Council's Cabinet on 21 September and this took place for 4 weeks from 22 September to 20 October 2022.

The schools that would be reorganised should the statutory proposal be approved to be implemented would be:

- Amble First School
- Amble Links First School
- Broomhill First School
- Grange View CE First School
- Red Row First School
- James Calvert Spence College (JCSC)

Statutory consultation with these stakeholders and the parents and staff of Barndale House Special School has also taken place on a proposal to provide additional specialist SEND places to meet the growing need for places for children and young people diagnosed with a primary need of Autistic Spectrum Disorder (ASD) and Social, Emotional and Mental Health needs (SEMH) within the Coquet Partnership area. This statutory proposal would see Barndale House Special School increase its planned pupil numbers from 60 to 110 through the creation of a satellite site at the South Avenue site of the current JCSC.

Cabinet approved the publication of both statutory proposals in the light of both the feedback received from the Governing Bodies in the Coquet Partnership and the proposed investment in school buildings in the partnership.

If the Statutory Proposals are approved for publication, Cabinet would need to make a final decision on the proposals within two months of the end of the representation period i.e. by 20th December 2022.

3) If you judge that this proposal is **not** relevant to some protected characteristics, tick these below (and explain underneath how you have reached this judgement).

Disability Sex Age ~~Race~~ ~~Religion~~ Sexual orientation

~~People who have changed gender~~ Women who are pregnant or have babies

Employees who are married/in civil partnerships

4) The characteristics checked above are not relevant because:

In the medium to long-term and in relation to both the reorganisation of the mainstream schools within the statutory proposal and the expansion of Barndale Special School onto a satellite site, there is no reason to believe that these statutory proposals would affect more positively or negatively than their peers any group of children, parents or staff linked with these schools defined by their religion, race or gender-reassignment status. Should the Council decide to implement the statutory proposals, during the immediate process of transition, families would be invited to inform the Council that they are concerned about the impact that the change may have on the support networks for any individual children who may be at particular risk of harassment or discrimination. Reasonable adjustments would be made to support individual students where appropriate.

As the statutory proposals do not include school closure proposals it is not envisaged that there would be any staff redundancies within the current first schools. Indeed, in relation to the first schools and to Barndale Special School, it is envisaged that additional staff would be needed to implement the proposed changes to these schools.

James Calvert Spence College would no longer need staff for Year 5 and 6 classes as it would become an age 11-18 secondary school and therefore there may be some staff within that school that could become at risk of redundancy. A Staffing Protocol has been agreed with the Governing Bodies of all schools in the Coquet Partnership and with Barndale House Special School to ensure that all staff at risk of redundancy are provided with an opportunity to be considered for posts for which they apply in the first instance. In addition, existing HR policies covering organisational change and redundancy would apply to staff employed at any of the maintained schools affected. These are designed to ensure that the equalities duties of the Council and the schools are fully met.

Reasonable adjustments would be made for disabled members of staff. The Council operates a guaranteed interview scheme for disabled members of staff.

PART 2 – Relevance to different Protected Characteristics

Answer these questions both in relation to people who use services and employees

Disability

Note: “disabled people” includes people with physical, learning and sensory disabilities, people with a long-term illness, and people with mental health problems. You should consider potential impacts on all of these groups.

5) What do you know about usage of the services affected by this change, decision or proposal by disabled people, about disabled people’s experiences of it, and about any current barriers to access?

October Census data is not yet available at the time of writing this EIA. As at January 2022, there were 11 students on roll at the first schools in Coquet Partnership who have been allocated an EHCP, while there were 10 students with an EHCP on roll at JCSC as at January 2022.

It is therefore expected that a number of students on roll at these schools will have EHCPs by the time the proposal is planned to be implemented from September 2024. Should the proposal be approved, individual transition plans would be developed to ensure that the impact of the relocation on this group of students is minimal and planned for effectively.

Any students who were offered a place at the proposed satellite site of Barndale House Special School in Amble would similarly have suitable transition plans in place in accordance with their needs.

Any member of staff, or parent or a carer of a student at one of the schools who has a disability would not be affected disproportionately by the proposal as any reasonable adjustments or arrangements would be put in place at the new buildings as part of the design process.

6) Could disabled people be disproportionately advantaged or disadvantaged by the change, decision or proposal?

Refer to para. 5

7) Could the change, decision or proposal affect the ability of disabled people to participate in public life? (e.g., by affecting their ability to go to meetings, take up public appointments etc.)

No evidence has arisen during the statutory consultation that the implementation of the statutory proposals would affect any current arrangements for disabled people to participate in public life. However, in relation to residents living in the areas around the location of the school sites in particular, should any impact in this regard come to light, ameliorating and proportionate measures would be investigated to address any negative impact.

8) Could the change, decision or proposal affect public attitudes towards disabled people? (e.g., by increasing or reducing their presence in the community).

No evidence has arisen during statutory consultation to suggest that the implementation of the statutory proposals would affect public attitudes to disabled people. However, should any impact in this regard come to light, ameliorating and proportionate measures would be investigated to address any negative impact.

9) Could the change, decision or proposal make it more or less likely that disabled people will be at risk of harassment or victimisation?

No evidence has arisen during statutory consultation to suggest that the implementation of the statutory proposals would affect public attitudes to disabled people. However, should any impact in this regard come to light, ameliorating and proportionate measures would be investigated to address any negative impact.

10) If there are risks that disabled people could be disproportionately disadvantaged by the change, decision or proposal, are there reasonable steps or adjustments that could be taken to reduce these risks?

The premise of the statutory proposal in relation to the reorganisation of the mainstream schools is that educational outcomes for all students in their schools would improve. Therefore, it is envisaged there would be disproportionate advantage of the proposal to all students on roll at the relevant mainstream schools within the partnership.

In relation to the development of a satellite site of Barndale House Special School in Amble, while it is also envisaged that their educational outcomes would improve, a key plank of this proposal is that students would also be able to access appropriate education for their needs as close to their home communities as possible; this would reduce travelling times to school and also enabling them to develop friendships with students in their local area. It is therefore envisaged that these students would be disproportionately advantaged both educationally and socially.

11) Are there opportunities to create *positive* impacts for disabled people linked to this change, decision or proposal?

Should these statutory proposals be implemented, there would potentially be opportunities for positive impacts for disabled people within the design of the new buildings that are not currently in place in existing buildings. See also para. 10.

Sex (Gender)

12) What do you know about usage of the services affected by this change, decision or proposal in relation to people of a certain gender, about their experiences of it, and about any current barriers to access?

Schools in the Coquet Partnership and Barndale House Special School are co-educational.

13) Could people of a certain gender be disproportionately advantaged or disadvantaged by the change, decision or proposal?

No evidence has arisen during statutory consultation to suggest that either boys or girls would be disproportionately advantaged or disadvantaged by the statutory proposals. However, should these statutory proposal be approved for implementation, this EIA would be updated with any evidence where it suggested that there could be any gender based disproportionate advantage or disadvantage.

14) Could the change, decision or proposal affect the ability of people of a certain gender to participate in public life? (e.g., by affecting their ability to go to meetings, take up public appointments etc.)

There is currently no evidence from statutory consultation to suggest that the ability of people of a certain gender to participate in public life would be affected by the implementation of the statutory proposals. However, should any impact in this regard come to light, ameliorating and proportionate measures would be investigated to address any negative impact.

15) Could the change, decision or proposal affect public attitudes towards people of a certain gender (e.g., by increasing or reducing their presence in the community)

There has been no evidence arising from statutory consultation to suggest that public attitudes to people with people of a certain gender would be affected by the proposals. However, ameliorating actions would be implemented in the event that issues were identified.

16) Could the change, decision or proposal make it more or less likely that people of a certain gender will be at risk of harassment or victimisation?

Should the statutory proposals be approved for implementation, the risk of harassment of victimisation of people of a certain gender, such as bullying, would be monitored. Should evidence be identified that risk of harassment had increased, relevant actions stated would be undertaken to address the reasons for harassment or victimisation, including awareness programmes.

17) If there are risks that people of a certain gender could be disproportionately disadvantaged by the change, decision or proposal, are there reasonable steps or adjustments that could be taken to reduce these risks?

No evidence has so far been identified to suggest that people of a certain gender could be disproportionately disadvantaged through the implementation of the statutory proposals. However, ameliorating actions would be implemented in the event that issues were identified.

18) Are there opportunities to create *positive* impacts for people with different sexual orientations linked to this change, decision or proposal?

It is envisaged that the positive impacts of both statutory proposals would affect a people of different sexual orientations equally. However, while none have been so far identified, any opportunities to create positive impacts for people with different genders would be identified.

Age

19) What do you know about usage of the services affected by this change, decision or proposal by people of different age groups, about their experiences of it, and about any current barriers to access?

First schools in the Coquet Partnership provide education to young people from the age of 2,3 or 4 to age 9, while JCSC provides education to young people between the ages of 9 and 18. Students on roll at these schools at the proposed date of implementation would be impacted. It is proposed that the new Barndale Special School satellite site would educate children and young people aged 2 to 18.

Staff at the schools all schools identified in the statutory proposals are employed equitably in accordance with the relevant school and council's employment policies. All appropriate HR processes and procedures would be adhered to throughout any staff consultation and redundancy process (if any were necessary) in line with NCC policies.

20) Could people of different age groups be disproportionately advantaged or disadvantaged by the change, decision or proposal?

While the main premise of the statutory proposals is that students would be advantaged educationally and would enjoy an improved educational experience, there would be other positive impacts of the proposals such as shorter journeys to school e.g. for children attending first schools that become primaries, they would receive their Year 5 and 6 education at their local school, while children who may be allocated a place at the new Barndale Special school satellite would be likely to have a shorter journey to school than may have been the case if they attended an alternative specialist provision. Therefore, shorter journeys to school would be seen as advantageous to those students.

21) Could the change, decision or proposal affect the ability of people of different age groups to participate in public life? (e.g., by affecting their ability to go to meetings, take up public appointments etc.)

There is no evidence to suggest from statutory consultation that the statutory proposals would have any effect on the ability of different age groups to participate in public life.

22) Could the change, decision or proposal affect public attitudes towards people of different age groups? (e.g., by increasing or reducing their presence in the community)

There is no evidence to suggest from statutory consultation that the proposed statutory proposals would affect public attitudes to different age groups.

24) If there are risks that people of different age groups could be disproportionately disadvantaged by the change, decision or proposal, are there reasonable steps or adjustments that could be taken to reduce these risks?

Should the statutory proposals be approved for implementation and evidence come to light that there are risks that people of different age groups could be disproportionately disadvantaged by the proposal, this EIA would be updated, and reasonable steps approved to be implemented to address such risk.

25) Are there opportunities to create *positive* impacts for people of different age groups linked to this change, decision or proposal?

The premise of the statutory proposals is to create a positive impact for all students on roll in schools in the Coquet Partnership and for those students who would be allocated a place at the Barndale Special School satellite site in relation to improved educational outcomes.

Pregnancy and Maternity

Note: the law covers pregnant women or those who have given birth within the last 26 weeks, and those who are breast feeding.

26) What do you know about usage of the services affected by this change, decision or proposal by pregnant women and those who have children under 26 weeks, about their experiences of it, and about any current barriers to access?

There is no evidence to suggest that the statutory proposals would create any barriers to students accessing at any of the schools included in the statutory proposals as all students eligible for Home to School Transport would receive it.

In relation to the proposed reorganisation of the Coquet Partnership mainstream schools, any parent of a student in a school in the partnership who may be pregnant or who has other children under 26 weeks old would not be disadvantaged as children in the first schools would stay at their school as it became primary up to the end of Year 6. This could therefore be advantageous to this protected group.

Any staff of schools named in the statutory proposals who may be pregnant would have the same rights extended to them under reorganisation, or in the case of Barndale Special School, if such staff took up a post at the proposed satellite site in Amble.

27) Could pregnant women and those with children under 26 weeks be disproportionately advantaged or disadvantaged by the change, decision or proposal?
See para.26.

28) Could the change, decision or proposal affect the ability of pregnant women or those with children under 26 weeks participate in public life? (e.g., by affecting their ability to go to meetings, take up public appointments etc.)

There is no evidence to suggest that the statutory proposals would have any effect on the ability of pregnant women or those with children under 26 weeks participate in public life under the proposals.

29) Could the change, decision or proposal affect public attitudes towards pregnant women or those with children under 26 weeks? (e.g., by increasing or reducing their presence in the community)

There is no evidence to suggest that the statutory proposal would have any effect on public attitudes to this protected group under the proposals.

30) Could the change, decision or proposal make it more or less likely that pregnant women or those with children under 26 weeks will be at risk of harassment or victimisation?

No evidence has arisen during statutory consultation to suggest that the statutory proposals would make it more or less likely that this protected group would be at risk of harassment or victimisation under the proposals.

31) If there are risks that pregnant women or those with children under 26 weeks could be disproportionately disadvantaged by the change, decision or proposal, are there reasonable steps or adjustments that could be taken to reduce these risks?

No, for the reasons set out at para. 26.

32) Are there opportunities to create *positive* impacts for pregnant women or those with children under 26 weeks linked to this change, decision or proposal?

See para. 26.

Sexual Orientation

Note: The Act protects bisexual, gay, heterosexual and lesbian people.

33) What do you know about usage of the services affected by this change, decision or proposal by people with different sexual orientations, about their experiences of it, and about any current barriers to access?

There is currently no evidence to suggest that any student on roll in a school named in the statutory proposals or a member of staff who identifies as LGBT employed by these schools would be disproportionately impacted positively or negatively should approval be given to implement the proposal.

However, should any pupil or member of staff who identifies with this group be identified as requiring support, the authority would encourage staff of schools named in the statutory proposals to use the Stonewall Education champion's resources and to increase awareness of any potential issues such as increased risk of bullying.

Should a member of staff identifying as LGBT in a school in the schools named in the statutory proposals feel that their support networks have been disrupted, staff would be made aware of the support available through the Council's LGBT staff group and managers will be made aware of the guide to supporting LGBT staff on the Council Equality and Diversity webpage. HR policies aim to promote equality and inclusion.

34) Could people with different sexual orientations be disproportionately advantaged or disadvantaged by the change, decision or proposal?

There is currently no evidence from statutory consultation to suggest that different sexual orientations would be disproportionately advantaged or disadvantaged by the implementation of the statutory proposals. However, ameliorating actions stated in para. 33 would be implemented in the event that issues were identified.

35) Could the change, decision or proposal affect the ability of people with different sexual orientations to participate in public life? (e.g., by affecting their ability to go to meetings, take up public appointments etc.)

No evidence arose during statutory consultation to suggest that the ability of people with different sexual orientations to participate in public life would be affected by the implementation of the statutory proposals. However, ameliorating actions stated in para. 33 would be implemented in the event that issues were identified.

36) Could the change, decision or proposal affect public attitudes towards people with different sexual orientations? (e.g., by increasing or reducing their presence in the community)

No evidence arose during statutory consultation to suggest that public attitudes to people with different sexual orientations. However, ameliorating actions stated in para. 33 would be implemented in the event that issues were identified.

37) Could the change, decision or proposal make it more or less likely that people with different sexual orientations will be at risk of harassment or victimisation?

Should the statutory proposals be approved for implementation, the risk of harassment of victimisation of people with different sexual orientations would be monitored. Should evidence be identified that risk of harassment had increased, the relevant actions stated in para. 33 would be implemented.

There is currently no evidence to suggest that any member of the public, or pupil in one of the schools named in the statutory proposals, or parent of a pupil on roll in the schools named in the statutory proposals or member of staff employed in one of the schools named in the statutory proposals who identifies as LGBT would be more or less likely to be at risk of harassment or victimisation. However, should any of this group of people who identifies within this protected group be identified as at risk as a result of the implementation of these proposals, the authority would encourage the staff of the relevant schools to use the Stonewall Education champion's resources and to increase awareness of any potential issues such as increased risk of bullying.

38) If there are risks that people with different sexual orientations could be disproportionately disadvantaged by the change, decision or proposal, are there reasonable steps or adjustments that could be taken to reduce these risks?

No evidence has arisen during statutory consultation to suggest that people with different sexual orientations could be disproportionately disadvantaged through the implementation of the statutory proposals. However, ameliorating actions stated in para. 33 would be implemented in the event that issues were identified.

39) Are there opportunities to create *positive* impacts for people with different sexual orientations linked to this change, decision or proposal?

While none have been so far identified, any opportunities to create positive impacts for people with different sexual orientations would be implemented, possibly through the implementation of the actions set out in para. 33.

Human Rights

40) Could the change, decision or proposal impact on human rights? (e.g., the right to respect for private and family life, the right to a fair hearing and the right to education)

While there is no specific evidence to suggest that the implementation of the proposal would impact positively on human rights, the rationale for this proposal as originally consulted on is to provide improved educational outcomes for all students on roll in schools in the Coquet Partnership and for those students who would be allocated a place at the satellite site of Barndale Special School in Amble, with a view to improving the life chances of those students.

PART 3 - Course of Action

Based on a consideration of all the potential impacts, indicate one of the following as an overall summary of the outcome of this assessment:

X	The equality analysis has not identified any potential for discrimination or adverse impact and all opportunities to promote equality have been taken.
	The equality analysis has identified risks or opportunities to promote better equality; the change, decision or proposal would be adjusted to avoid risks and ensure that opportunities are taken should they be required.
	The equality analysis has identified risks to equality which will not be eliminated, and/or opportunities to promote better equality which will not be taken. Acceptance of these is reasonable and proportionate, given the objectives of the change, decision or proposal, and its overall financial and policy context.
	The equality analysis shows that the change, decision or proposal would lead to actual or potential unlawful discrimination or would conflict with the Council's positive duties to an extent which is disproportionate to its objectives. It should not be adopted in its current form.

41) Explain how you have reached the judgement ticked above and summarise any steps which will be taken to reduce negative or enhance positive impacts on equality.

From the initial analysis of the possible negative or positive impacts of the statutory proposals on the groups with protected characteristics, the premise of the proposal as originally consulted on suggests that students on roll at schools in the Coquet Partnership and those students who would be allocated a place at the satellite site of

Barndale Special School in Amble would be disproportionately advantaged. Should a decision be made by the Council's Cabinet to approve the implementation of the statutory proposals, any evidence arising during implementation that suggests that there could be possible negative impacts, identified risks would be analysed to establish whether or not there were certain risks to any or all of those groups. Steps to reduce negative impacts or enhance positive impacts would then be defined.

PART 4 - Ongoing Monitoring

42) What are your plans to monitor the actual impact of the implementation of the change, decision or proposal on equality of opportunity? (include action points and timescales)

This EIA has assessed in the light of feedback from the informal and statutory consultation periods set out earlier in this report. Should the proposals be approved for implementation, the EIA would be further updated during the implementation period. Appropriate action would be identified in the light of the consultation and where necessary, an action plan with timescales developed.

PART 5 - Authorisation

Name of Head of Service and Date Approved

Once completed, send your full EIA to: Irene.Fisher@northumberland.gov.uk. A summary will then be generated corporately and published to the Council's website.

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Northumberland
County Council

The Outline Business Case for the Investment in school buildings for James Calvert Spence College



Document Control

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4D	Arboricultural Survey
4E	Topographical Survey
4F	Utilities Survey
4G	FF&E including technology audit
4H	IT Audit
4I	Schedule of spaces that remain undersized
4J	Letter of comfort from NCC Planners
6A	Project Risk Register

Glossary of Terms

Term	Definition
BB103	The document which sets out simple, non-statutory area guidelines for school buildings and sites
BCIS	Building Cost Information Service



BS8300	A code of practice that details the required design of buildings for meeting the needs of disabled people
CBR	California Bearing Ratio
CDM	Construction Design and Management
DDA	Disability Discrimination Act
DfE	Department for Education
EA	Environment Agency
EclA	Ecological Impact Assessment
ERIC NE	Environmental Records Information Centre Northeast
ESFA	Education and Skills Funding Agency
FACS	Family And Children's Services
FBC	Final Business Case
FFE	Furniture, Fixtures and Equipment
FTS	Find a Tender
ICT	Information and Communications Technology
ITT	Invitation to Tender
IRZ	Impact Risk Zone
ITPD	Invitation to Participate in Dialogue
ITT	Invitation to Tender
JCSC	James Calvert Spence College
LA	Local Authority
MUGA	Multi Use Games Area
NCC	Northumberland County Council
NPPF	National Planning Policy Framework
OBC	Outline Business Case
OJEU	Official Journal of the European Union
OS	Ordnance Survey



PCR	Public Contracts Regulations
PCSA	Pre-Construction Services Agreement
PQQ	Pre-Qualification Questionnaire
PROW	Public Right of Way
RIBA	Royal Institute of British Architects
RIBA stage	Denotes the design work stages that address the required phase of a construction project
SEN	Special Educational Needs
SoA	Schedule of Accommodation
SSSI	Site of Special Scientific Interest
SuDS	Sustainable Drainage System

EXECUTIVE SUMMARY

This document outlines the options appraisal, cost estimates, affordability assessment and procurement strategy carried out in relation to the proposal to provide Capital Investment in the school buildings for James Calvert Spence College with community facilities.

The outline business case explores a number of options for the redevelopment of the school including refurbishment and extension of the existing school buildings, providing new school buildings and doing the minimum to enable the school to become an 11-18 secondary school. Sufficient detail is included in this OBC to allow an informed decision as to how capital funding is to be best used and for approval to be sought from Cabinet for the implementation and delivery of the preferred scheme.

1 Overview and commitment

Section 1 and **Appendix 1** of this Outline Business Case describe the scheme and confirm the commitment of all parties to the project.

The preferred scheme supports the objectives set out in Northumberland County Council's vision for Northumberland's residents. While strong leadership and good governance are key components of successful schools, the provision of a suitable learning environment can have a positive impact on outcomes for children and young people. This scheme delivers a service that has positive outcomes for the community.

The need to improve the buildings of James Calvert Spence College (JCSC) had already been identified through the ongoing maintenance programme. Additional funding to improve the buildings of the school would be extremely beneficial to improve outcomes for the Northumberland children and young people who attend it. Subsequently, Northumberland County Council approved funding for officers to carry out works to enable the development of this Outline Business Case which sets out the work undertaken to establish the feasibility and affordability of this proposal. The high-level costs for this option are outlined in Section 5.

As well as improving the teaching and learning environment for current and future pupils in the schools, improvements to the on-site sporting and community facilities will benefit the wider Amble community.

Pupil place planning data for Coquet Partnership shows that reprovision of the current capacity for pupils at JCSC will be adequate for current and future needs.

The timeline for the delivery of the school aims for a handover date of 01/09/25.



2 Procurement strategy

Section 2 and **Appendix 2** of this Outline Business Case describe the Procurement Strategy for the whole scheme.

Following a review of procurement options available for construction projects, it is recommended that the development is procured through a Design and Build strategy utilising a single stage tendering procedure tendered at the end of RIBA stage 4.

It is recommended that the project proceeds via a Public Contracts Regulations (PCR) compliant, non-Framework 'open' tender process.

The key objective for the delivery of the project is to open the new secondary school for operation from September 2025.

Key dates for the provision of a new build secondary school are as follows:

1. OBC approval 17 November 2022
2. RIBA stage 3 designs instructed 21 November 2022
3. Planning submitted 17 February 2023 and determined on 06 June 2023
4. RIBA stage 4 designs completed 07 July 2023
5. Tenders issued 24 July 2023
6. Tenders returned 29 September 2023 and contract awarded 27 October 2023
7. Construction commences on site 13 November 2023
8. New school opens 01 September 2025



3 Land

Section 3 of this Outline Business Case describes the site options appraisal undertaken that contributes to the design and construction works for the preferred option.

This section outlines the options available for the redevelopment. The Options Appraisal outlines the advantages and disadvantages of each option together with planning commentary. The outcome of the appraisal which has been independently assessed by a special surveyor has resulted in Option 5 being the preferred option. This option would see the development of a new school building for JCSC on the school land to the east of the recreation ground.

4 Design and Construction

Section 4 and **Appendix 4** of this Outline Business Case describe the design options and investigative survey works undertaken to demonstrate feasibility.

The studies that form the Outline Business Case (OBC) have considered the Education Brief, Planning, Highways, and Sport England requirements. In addition, all of the surveys referenced in this OBC have been taken into consideration as have all design guidance and standards that are relevant to this initial stage of design.

The whole sale refurbishment and upgrade of the existing estate is feasible but would be lengthy and disruptive and due to the constraints associated with the existing building would still, when complete have inherent issues in terms of space standards and circulation deficiencies.

The redevelopment of the existing site with new buildings has significant compromise, mostly due to the need to build away from the existing buildings to mitigate disruption and ensure continuity of curriculum delivery. Neither option uses the site to best effect, and will have long disruptive phased programmes. The construction access is complex.

The development of the recreation ground site would be a good option if it were not for the complexities/risks associated with ownership and covenants, which if not easily navigated put undue risk and cost onto the proposal along with the need to replace the recreation facilities

A new build option on the land east of the recreation ground is the most advantageous option. The site can be developed without any disruption to the continuity of education delivery and there are no legal complications in regard to site ownership.

5 Commercial appraisal



Section 5 of this Outline Business Case describes the commercial appraisal for the options available for the scheme.

The Overall Project Outturn Cost for the recommended option (Option 5 - New Build on Land East of Recreation Ground) is £25,726,000.

This is exclusive of VAT however includes abnormals, professional fees, ICT, FF&E and the additional funding of £2,335,398 to support the further recommendation to achieve Net Zero Carbon in Operation.

6 Readiness to Deliver

Section 6 and **Appendix 6** of the Outline Business Case sets out NCC's project management structure and identifies the roles and responsibilities of each part of the structure.

Northumberland County Council has put in place resources for the duration of the project, including post contract, to monitor and maintain ongoing relations between Northumberland County Council and JCSC to ensure the effective delivery of the project, throughout its lifetime.

A Bidders' Day will be organised in the spring of 2023.

Several risk workshops have been held and a risk strategy developed. Risk will continue to be monitored and evaluated with any changes being reported to the project board on a monthly basis.

7 Moving Forward

Section 7 sets out the proposed recommended approach for the procurement should approval for the scheme be given by Northumberland County Council's Cabinet.

A critical path of scheduled delivery activities has been provided based on the proposed route to market, Design and Build Single Stage Procurement, and in line with the Public Contracts Regulations [PCR] 2015.

The RIBA Stage 3 design will need to proceed immediately on approval of the OBC for the key milestones to be achieved. The design process will progress on through to RIBA Stage 4 / tender issue level by July 2023.





1 OVERVIEW AND COMMITMENT

Section 1 and **Appendix 1** of this Outline Business Case describe the scheme and confirms the commitment of all parties to the project.

1.1 The Corporate Vision

Northumberland County Council (NCC) has set out its vision for the County in its Corporate Plan 2021-24. The principles of the vision are focused on ensuring we are: “A council that works for everyone”

Our Values

Residents first

- Respond to the needs of all of our residents
- Provide the right information at the right time
- Deliver services that have positive outcomes for the community

Excellence and Quality

- Respect the diverse communities that we serve
- Act on feedback to ensure the best customer journey
- Look for opportunities to improve customer experience

Respect

- Build strong and long-lasting relationships based on trust and mutual respect
- Involve communities and staff in decisions which affect them
- Support communities to embrace change and innovation

Keeping our communities safe and well

- Quality and Safety will be at the heart of everything we do
- Empower our residents to do as much for themselves as possible
- Set clear standards and report against them

1.2 Strategic Overview

1.2.1 Countywide Strategy

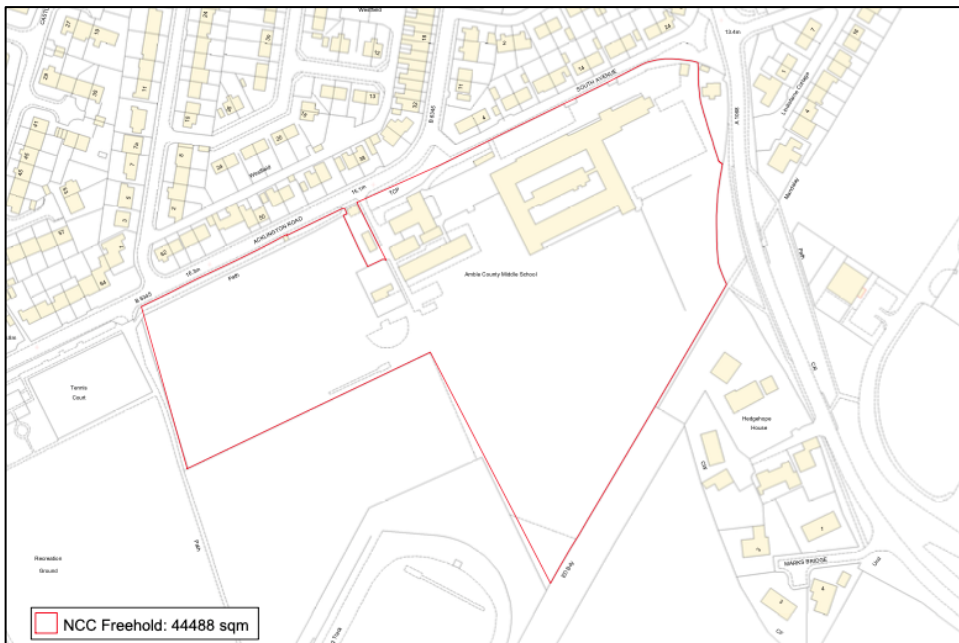
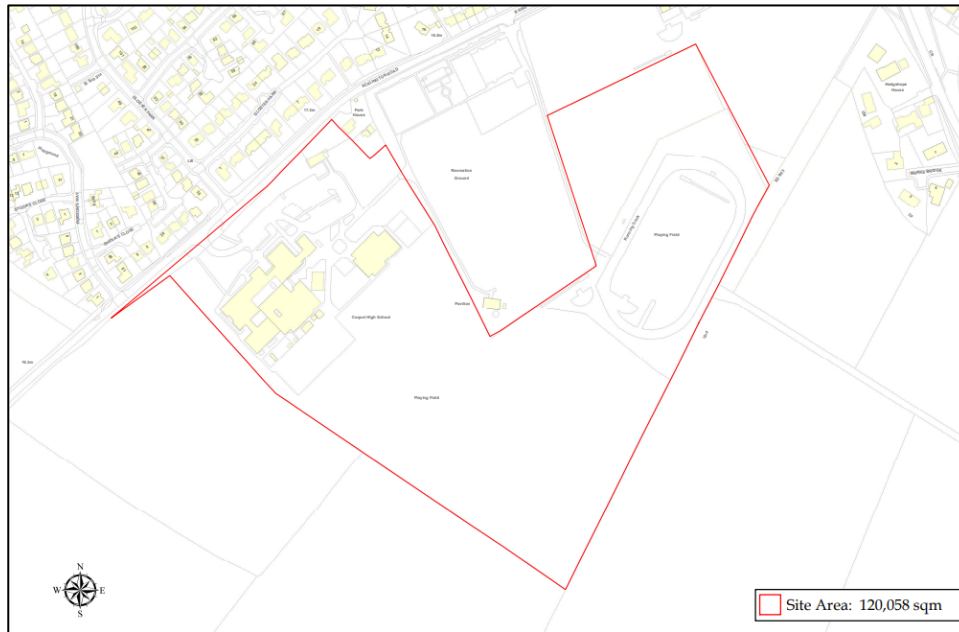
Improving the quality of education in Northumberland is a key priority for the local authority's (LA's) elected members. Both the Corporate Plan and the Joint Health and Wellbeing Strategy (JHWS) 2018 - 2028 place education at the heart of the work of the Council and its partners.

Elected members recognise how vital it is for the future prosperity of Northumberland that our children and young people achieve to the best of their abilities in schools, academies and colleges and that all our educational establishments are judged to be good or better by Ofsted.

It is accepted that while strong leadership and governance in schools together with good teaching is key to improving outcomes for pupils, studies have shown that poor quality surroundings can impact negatively on effective teaching and learning, both for staff and pupils. To address this issue, NCC is proposing to continue to invest significant capital resources in education.

1.2.2. Project Overview

James Calvert Spence College is currently an age 9-18 school. It was formed from the amalgamation of JCSC South Avenue (formerly named Amble Middle School) and JCSC Acklington Road, the school operates across a split site. A statutory consultation has recently closed and the proposal to reorganise the Coquet Partnership to become a two-tier model of primary and secondary schools will be decided upon by the Council Cabinet on 17th November 2022. If approved the changes would take place from September 2024 and JCSC will operate as an age 11-18 secondary school. The current site of high school is shown outlined in red below the second plan is of the site occupied by middle school age pupils:



1.2.3 Strategy and Objectives

The rationale for the initiation of this project has been founded on JCSC's desire to provide a financially and educationally secure future for its schools. They were also faced with the need for significant capital investment in the school estate.

The project would improve the teaching and learning environment for current and future pupils in the schools, including on-site sporting and community facilities that would also benefit the Amble community as a whole.

The objectives of this project are to:



- Ensure value for money for the Council by driving down all project costs whilst delivering the agreed scope of works to a high quality and to programme.
- Provide good quality, modern teaching and learning environments for the pupils attending JCSC thereby removing existing physical barriers that distract from the teaching and learning experience.
- Provide buildings that deliver a high level of environmental performance that is in step with the Council's Climate Emergency goals.
- Support the delivery a coherent transport and travel plan for the local community.
- Provide modern sporting facilities on-site to enhance the curriculum offer and to provide improved sporting and community facilities for the wider community in and around Amble that will increase participation and associated benefits.
- Support JCSC in providing a financially and educationally secure future for its school.



1.2.4 Stakeholder Consultations moving forward

Consultation Process

A six-week informal consultation was undertaken from 11th May 2022 until 29th June 2022. A consultation document, which set out the rationale, background and implications of the proposal, was circulated directly to stakeholders including parents, staff and governors. The Council, on behalf of the school, invited stakeholders to respond to the consultation.

Following analysis of the feedback and responses it was concluded that all of the schools and the majority of the stakeholders who responded (92%) supported the proposed reorganisation of the partnership to a 2-tier (primary/secondary) organisation.

Further engagement will be planned in order that the pupils of the school can get involved through pupil workshops to influence the final designs and finishes as will the staff of the school who will be involved in detailed design workshops. The workshops will ask pupils to look at the plans and highlight both positive and less favourable aspects of the build. Through staff and pupil involvement there could be further development of the designs.

There will also be an opportunity for the wider community to be involved in consultation events as the design for the new schools and site develop, with a pre-planning consultation event taking place.

1.2.5 Pupil Place Planning

Birth data for Coquet Partnership is relatively steady, although this masks some variation in capacity at the individual school level, e.g. at the first and primary phase, some schools are more popular and attract pupils from other catchments. Most pupils at first school phase attend schools in the Coquet catchment, while 66% of secondary age pupils attend James Calvert Spence College (JCSC), with other pupils attending neighbouring partnership schools, mainly The Duchess High School in Alnwick.

There is also very little inward flow of pupils into the Coquet partnership, with only 2% of pupils at first school and secondary phase residing in other partnerships. There is some housebuilding planned within the partnership locally over this forecast period which will impact on a small number of schools, but due to parental preference there is sufficient capacity for pupils within their own catchment schools for the foreseeable future. As a result of relatively high surplus places at JCSC, overall surplus places in the partnership are at 26%. It is envisaged that the reorganisation of the partnership to a 2-tier (primary/secondary) structure will assist in retaining more pupils within the partnership into the secondary phase.



Final Forecasts																NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13		TOTALS
Actual Jan 2021	120	104	118	119	125	109	118	97	103	93	92	78	38	32		1346
2022	122	123	105	120	122	121	112	111	97	106	96	94	39	26		1395
2023	120	126	125	109	124	119	125	107	112	101	110	99	46	27		1450
2024	116	124	125	125	110	118	120	116	106	113	102	110	46	31		1463
2025	102	120	122	124	125	103	118	111	113	105	114	101	51	32		1442
2026	116	104	117	120	124	117	103	109	107	113	105	112	47	35		1429
2027	112	116	100	113	117	113	114	92	102	104	110	101	53	32		1378
2028	111	112	112	96	110	107	111	102	87	100	102	106	49	36		1341
2029	109	110	110	111	96	104	108	102	100	87	100	101	53	34		1326
PAN TOTALS	157	157	163	163	163	141	141	120	120	120	120	120	90	90		1865

1.3 Preferred Scheme

There is considerable support from the school for substantial investment in JCSC buildings. NCC and JCSC have been working together to develop the scope and options for the project delivery. As a result of these many months of work, the Executive Headteacher and staff support the vision of rebuilding the school on the existing site. Educational and financial security would be best addressed through this option.

The preferred scheme detailed in the OBC therefore is to rebuild the school on the school land to the east of the recreation ground. This conclusion has been made by drawing upon JCSC's Education Brief (which is contained at Appendix 4A) and the site option appraisal contained in section 3 of this report.



1.3.1 Timeline

Table 1A: Timeline

Event	Date
Final Business Case complete	10/04/23
Submit Outline Business Case and report	03/10/22 - 07/10/22
FACS	01/11/22
Cabinet	08/11/22
PIN Notice Period	08/11/22 - 10/04/23
RIBA Stage 3 Designs	14/11/22 - 17/02/23
Planning Submission	17/02/23
Planning Approval	06/06/23
Prepare ITT Documents	24/04/23 - 21/07/23
Tender Period	24/07/23 - 29/09/23
Appraisal / NCC Approvals / FBC	02/10/23 - 27/10/23
Award of contract	27/10/23
Construction	13/11/23
Handover	21/08/25

1.3.2 Accommodation

The Schedule of Accommodation can be found in Appendix 1C.

1.3.3. Local Authority Commitment

James Calvert Spence College are supportive of NCC's intention to invest in the school buildings.

1.4 Summary

The preferred scheme supports the objectives set out in Northumberland County Council's vision for Northumberland's residents. While strong leadership and good governance are key components of successful schools, the provision of a suitable learning environment can have a positive impact on outcomes for children and young people.

The need to improve the buildings for JCSC had already been identified. Subsequently, Northumberland County Council approved funding for officers to carry out works to enable the development of this Outline Business Case of which sets out the work undertaken to establish the feasibility and affordability of this proposal. The high-level costs for this option are outlined in Section 5.

A site option appraisal of the potential sites for the development of the new school determined the existing site to be most suitable for the new build requirements, therefore redeveloping the existing site is the preferred option. The local authority, with support from JCSC are now working together to ensure the project is delivered within agreed timescales.

As well as improving the teaching and learning environment for current and future pupils in the schools, improvements to the on-site sporting and community facilities will benefit the wider Amble community. Pupil place planning data for Coquet Partnership determines that reprovion of the current capacity for pupils at JCSC will be adequate for current and future needs.

The design and development of the new school supports the Council's agreed Climate Change Action Plan 2021-23 and its aspiration to move Northumberland to a Net Zero carbon position by 2030.

The timeline for the delivery of the school aims for a handover date of 21st August 2026.

The following documents are attached at **Appendix 1:**

1A	Pupil/catchment data
1B	Letter of support from JCSC Governing Body
1C	Schedule of accommodation



2 PROCUREMENT STRATEGY

Section 2 and Appendix 2 of this OBC describe the Procurement Strategy for the whole scheme.

This section of the Outline Business Case outlines how the overall scheme will be procured given the information and time constraints available.

2.1 Procurement Options

A Procurement Report has been developed at Appendix 2C which considers the following four procurement options:

1. Traditional
2. Design and Build
3. Management Contracting
4. Construction Management

Northumberland County Council's key objectives for the delivery of the project are noted as follows:

1. School to be open and operate from September 2025
2. Lump Sum Contract
3. Risk reduced to manageable level

Management Contracting and Construction Management procurement routes involve the Client retaining a large portion of the scheme risk and in addition they do not provide a lump sum contract, therefore both options were discounted as they do not comply with the above parameters.

Traditional procurement, most risk is born by the Client through this route and on a scheme of this cost the level of risk retained would be excessive.

Design and Build procurement shares risk between the Contractor and Client on a more even basis, design can overlap with construction activities commencing and a lump sum contract is obtained prior to contract award.

2.2 Recommended Option

It is recommended that a Design and Build Procurement strategy is utilised to deliver the project; either via a single stage, two stage or competitive dialogue tendering process.

Soft market testing would be undertaken on issue of the PIN (Prior Information Notice) to establish the market's views to the tendering process and to consider the appetite for each of the processes listed above.

A single stage approach creates greater competition in pricing across all tendered works and allows the Authority greater control of the design by retaining the design team through the development and technical design stages.

A two-stage approach comes with a more significant proportion of risk associated with the negotiation of the second stage contract packages as has been demonstrated on several recent projects where negotiations were extremely difficult and protracted. Through observation of the volatile market in the North East, on a scheme of this size, the market's preference would be for a two-stage tender approach.

A variation to the two-stage approach, which introduces a greater element of competition during the second stage, would be to shortlist the suppliers down to two bidders. This could be done at the end of either RIBA stage 3 or 4. This allows a final cost submission to be sourced in competition, as one of two, and may be more attractive to the market. Another alternative of this approach is for the two bidders to be engaged throughout RIBA stage 4 technical to advise on buildability. Market appetite would need to be explored for this option.

A competitive dialogue approach is best utilised where the key driver is introducing design competition through the contractor's design teams to obtain an innovative and unique building design. This route however is labour intensive and extremely expensive for contractors to bid. There is a value threshold where the market will not consider this to be an appropriate method due to the costs incurred in bidding via this method. It is anticipated this scheme is below that value and doesn't have the design demands to warrant such a route to market.

Development of designs can be managed through these options to a varying degree of control. There is also the ability to take designs through to developed designs (RIBA stage 3) or to technical designs (RIBA stage 4). The design team will be novated across to the preferred bidder at the contract award stage to ensure their continued involvement.

The principal difference is around the level of control that the client wishes to maintain with the design development. Developing designs to RIBA Stage 3 requires the contractor to complete the design increasing the likelihood of design aspirations not being fully

understood and implemented and design changes being proposed to make the project more profitable and to ease buildability for the contractor on site.

Taking designs through to RIBA stage 4, the client would have full control of the design process which would enable the design intent to fully reflect their objectives. This will be key if the scheme is to be designed to Net Zero Carbon in Operation as the design detailing is critical to hitting the necessary standards.

To reduce risk to a manageable level, to retain full control of the design objectives for the scheme and to ensure the requirements of Net Zero Carbon in Operation are achieved it is recommended to follow a single stage Design and Build procurement strategy tendered at the end of RIBA stage 4.

2.3 Route to Market

Advice has been obtained from the Procurement department within NCC to understand its obligations regarding the Public Contracts Regulations (PCR) 2015.

Whilst there are benefits to proceeding with an open tender or Framework procedure which will be discussed below, it is recommended that this project proceeds utilising a PCR compliant, non-Framework 'open' tender process.

The procurement programme highlights that there is time to tender through an Find a Tender (FTS) notice as this can be run in parallel with the development of stage 3 designs and the determination period of the planning application.

Using a PCR compliant, non-Framework 'restricted' option has been discounted as it will add both additional time and elongate the programme by three months and thus is not a deliverable option. This is due to the requirement of having to publish the ITT (Invitation to Tender) at the SQ stage which can only be done on completion of RIBA Stage 3 at the earliest.

There are several benefits of procuring from a Public Sector compliant framework; contractors have prequalified saving the cost of this exercise, have tendered their level of overheads and profit and have provided a benchmark on their preliminary costs. The downside however is that there is a potential levy charge for utilising frameworks which adds a further capital cost to the scheme. The benefit however is the saving in time gained by the prequalification, so framework options are essentially used when programme deadlines are at risk of being met.

There are several Public Sector compliant frameworks that Northumberland as either a member organisation or as a Public Sector Contracting Body in the UK can purchase from, both local and national. Framework options such as NEPO, YORBuild, CCS, SBS, Pagabo, Procure Partnerships. Another option for the Authority is to utilise one of the DfE's contracting frameworks. NCC procurement will look at all available frameworks to see which is best value for the authority.

The selection of which framework to use will be essential in obtaining the best tender list for the project to ensure the right level of competition is realised and that local suppliers are provided with an opportunity to bid. The quality of contractor is always important and part of the frameworks vetting process but will be given additional scrutiny if Net Zero Carbon in Operation is to be set as a requirement.

Going through a framework tender process will reduce tendering costs and alleviate the pressure on internal resources. However, this needs to be balanced against the additional cost of the levy and whether the frameworks list of prequalified contractors is not too restrictive in respect to ensuring value for money and that local suppliers aren't precluded.

In Summary, an 'open' or framework tender process will offer value and a competitive price for NCC. Procuring from a framework will be potentially cheaper, subject to the levy charge, however a PCR compliant, non-Framework 'open' tender process may provide a more robust list of tenderers.

In consultation with NCC's procurement team, it is recommended that we proceed with the PCR compliant, non-Framework 'open' tender process.

2.4 Procurement Programme

Two programmes have been appended to this Outline Business Case at Appendix 2A and 2B to demonstrate the procurement of the project through a Design and Build approach using the single stage tendering strategy tendered at the end of RIBA stage 4.

The programme for procurement post planning submission, runs over a total duration of thirty-eight weeks. The programme allocates four weeks to scrutinise the bidders' proposals.

Key Dates are as follows for the two options:

2.4.1 Secondary School (New Build and Refurbishment / Extension)

Outline Business Case (to end of RIBA Stage 2)	11 May – 30 Sep 2022
Outline Business Case Approval	08 Nov 2022
PIN Notice Period	08 Nov – 10 Apr 2023
RIBA Stage 3 Designs	14 Nov – 17 Feb 2023
Planning Submission	17 Feb 2023
RIBA 4 Detailed Designs	20 Feb – 07 Jul
Planning Approval	06 Jun 2023
Prepare ITT Documents	24 Apr – 21 Jul 2023



Tender Period	24 Jul – 29 Sep 2023
Appraisal / NCC Approvals / FBC	02 Oct – 27 Oct 2023
Award contract	27 Oct 2023



2.5 Enabling Works Programme

To enable the school to operate as a secondary school from September 2024 and to support the works associated with the wider reorganisation of the Coquet Partnership 8 modular classrooms are required to be in use by the end of the May half term in 2023.

Three double mobiles currently sited on the Middle School site are to be relocated together with the purchase of one new double mobile. Direct negotiations on the relocation and provision of the new will commence immediately in the new year in 2023 with works scheduled for 7 weeks commencing on 17th April and completing by 2nd June 2023.

Direct Negotiations with Portakabin	2 Jan – 24 Mar 2023
Contractor Lead-in	27 Mar – 14 Apr 2023
Relocation of 6 and Provision of 2 new Mobile Classrooms	17 Apr – 2 Jun 2023

2.6 Construction Programme

It will be the responsibility of the successful contractor to provide a construction programme to support the delivery of the construction project.

Upon appointment of the Contractor, a set of contract documents will be issued for execution by both the Contractor and Client. This will include a set of updated designs for Contract which will further develop into Construction Issue Drawings which is what the Contractor will use to undertake the works on site.

2.6.1 Secondary School (New Build on Existing Site)

A period of 80 weeks for construction is anticipated inclusive of commissioning but exclusive of the 8 weeks mobilisation period. A period of 3 weeks is programmed for decanting the end user of the building which commences at handover. A 3-week contingency period has also been factored into the programme to account for any unforeseen delays and tie in with handover ready for the start of the new School year.

Contract finalisation (Standstill period)	30 Oct – 10 Nov 2023
Contractor lead-in	13 Nov – 05 Jan 2024
Construction commences on site	08 Jan 2024
Construction complete on site (Phase 1)	18 July 2025
Decanting complete	29 Aug 2025
School opens	01 Sep 2025
Demolition and External Pitch Works (Phase 2)	02 Sep – 16 Feb 2026



The above durations assume all New Build on the Existing Site. If the decision is to retain and refurbish the existing sports block, then this would add 3 to 4 months onto the programme on the assumption that this is undertaken once the new school is built. It would leave the school without the sports block for the duration noted above or add an additional layer of cost to provide temporary indoor sport facilities.

2.6.2 Secondary School (Refurbishment / Extension of existing building)

A period of 136 weeks for construction is anticipated split across 6 phases of work inclusive of the new build extension. To keep the school operational and to minimise the amount of temporary accommodation on site, a phased approach is required. This will require a series of decants, will be very disruptive to the learning environment, will be more expensive due to the piece meal nature of the work and if chosen will add a full year to the programme, from that of the New Build option, before the school can be operational.

Contract finalisation (Standstill period)	30 Oct – 10 Nov 2023
Contractor lead-in	13 Nov – 05 Jan 2024
Construction commences on site	08 Jan 2024
Phase 1 (decant, asbestos strip, construction)	08 Jan – 12 Jul 2024
Phase 2 (decant, asbestos strip, construction)	15 Jul – 17 Jan 2025
Phase 3 (decant, asbestos strip, construction)	20 Jan – 25 Jul 2025
Phase 4 (decant, asbestos strip, construction)	28 Jul – 30 Jan 2026
Phase 5 (decant, asbestos strip, construction)	02 Feb – 07 Aug 2026
Remove temporary accommodation and make good	10 Aug - 21 Aug 2026
School opens	01 Sep 2026

To support the phasing programme and to decant the children from the existing school to allow refurbishment to be undertaken there will be a requirement to provide a temporary village of modular classrooms. These classrooms will need to be in-situ for more than two years (135 weeks). They will need to be in place for works commencing on 8 January 2024 and it is recommended that the provision and hire of these temporary units is negotiated with Portakabin at the same time as the 8 modular classrooms referred in the Enabling Works Programme.

2.7 Summary

Following a review of procurement options available for construction projects, it is recommended that the development is procured through a Design and Build strategy utilising a single stage tendering procedure tendered at the end of RIBA stage 4.

It is recommended that the project proceeds via a PCR compliant, non-Framework 'open' tender process.

The key objective for the delivery of the project is to open the new secondary school for operation from September 2025.

The refurbishment and extension option misses the above target date by a full calendar year and is therefore not a deliverable option. It is therefore our recommendation that we proceed with the new build option.

Key dates for the provision of a new build Secondary School are as follows:

1. OBC approval 17 November 2022
2. RIBA stage 3 designs instructed 21 November 2022
3. Planning submitted 17 February 2023 and determined on 06 June 2023
4. RIBA stage 4 designs completed 07 July 2023
5. Tenders issued 24 July 2023
6. Tenders returned 29 September 2023 and contract awarded 27 October 2023
7. Construction commences on site 08 January 2024
8. New school opens 01 September 2025

The following documents are attached at **Appendix 2:**

2A	Programme - Refurbishment
2B	Programme – New Build
2C	Procurement Report



3 LAND

Section 3 of this Outline Business Case describes the site options appraisal undertaken which contributes to the design and construction works of a preferred option.

3.1 Introduction

The scheme outlined for James Calvert Spence College, which is currently split over two sites at South Avenue and Acklington Road, involves the potential refurbishment or construction of a new school at the Acklington Road site.

This section outlines the potential development options considered, including the Options Appraisal undertaken for the purpose of demonstrating that the scheme is deliverable.

The existing site is large enough to continue to meet DfE standard BB103 guidance for sports pitches.

The approximate sizes of the sites are;

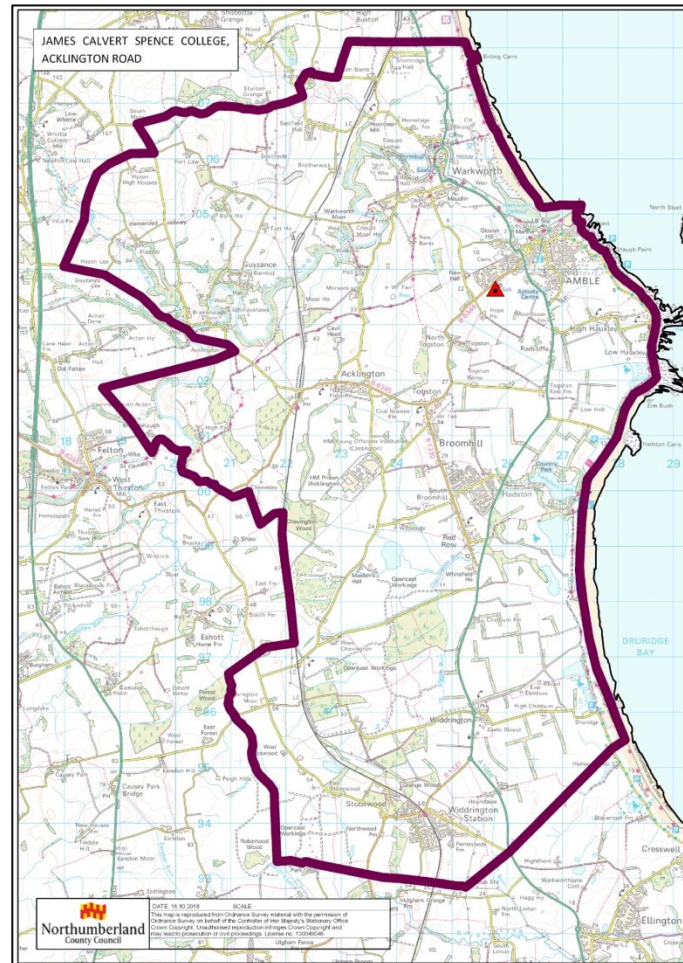
- South Avenue – 10.4 acres
- Acklington Road – 29.9 acres

3.2 Site Options

A site options appraisal was undertaken to identify any available sites. The following sites were discounted:

Search Parameters

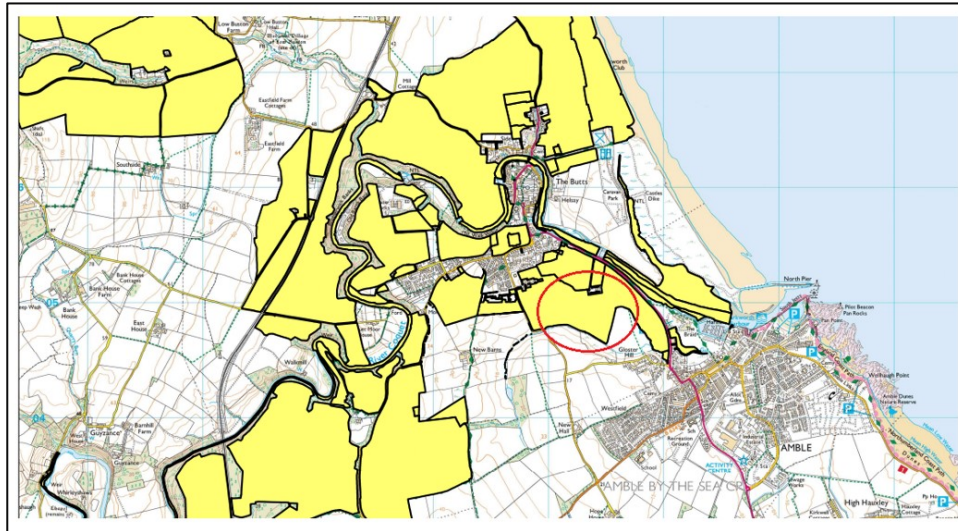
- Within the James Calvert Spence catchment area
- Good adjacency to current Schools
- Accessible from major transport routes
- Good accessibility for travel on foot/bike
- Close to settlement boundary
- Not affected by physical features i.e. pylons, ponds, watercourses
- Min 45,000m² site area



Land north of Gloster Hill

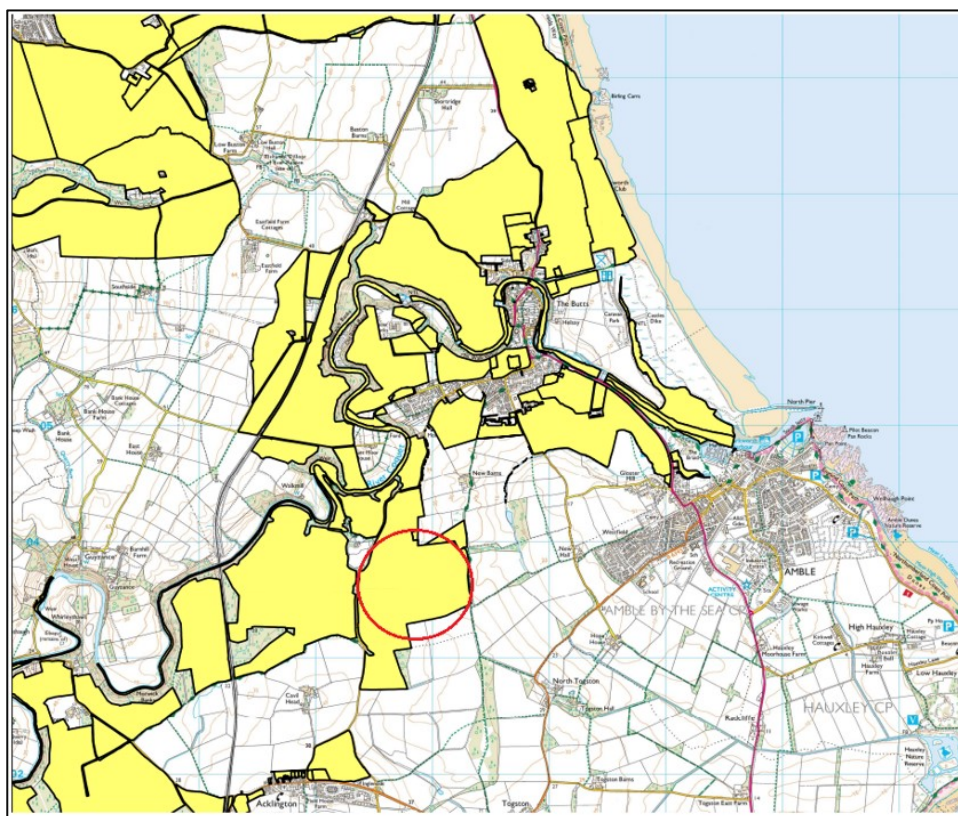
- Location is too far away from town centre
- Transport issues for getting pupils to school
- Limited sustainable travel
- Not suitable for walking or cycling to the site from the town centre
- Potential planning issues and change of use
- Potential agricultural tenancies to consider





Land north west of B6345

- Location is too far away from town centre
- Access issues to the site due to its rural location and poor road network
- Transport issues for getting pupils to school
- Limited sustainable travel options
- Not suitable for walking or cycling to the site from Amble town centre
- Potential planning issues and change of use
- Potential agricultural tenancies to consider



Land south of current school site

- Recently obtained planning permission for housing development
- Site is privately owned and not within Council ownership

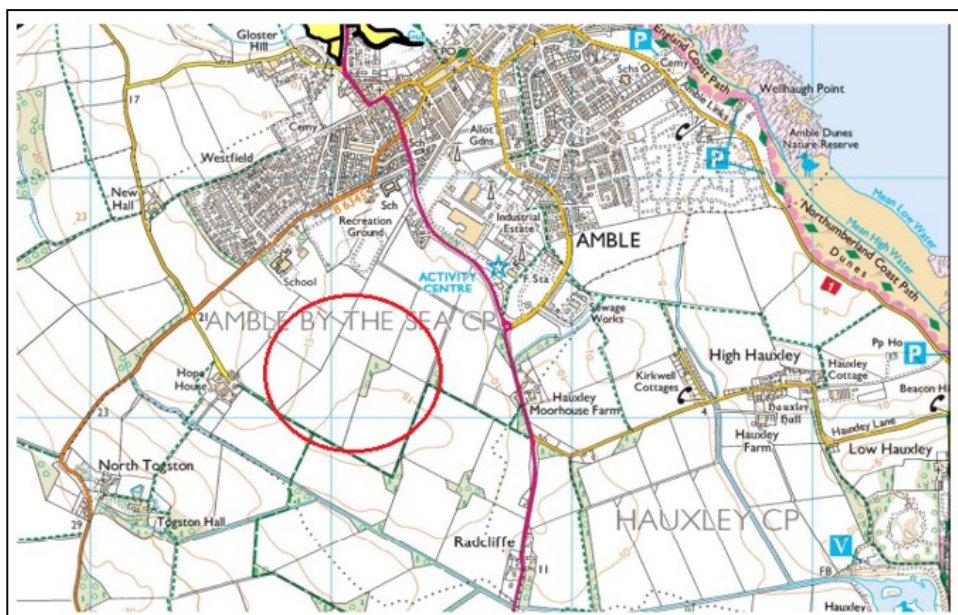


Table 3B states the following options have been considered:

Table 3B: Site Options

Option 1 - Do minimum required & address maintenance backlog issues
Option 2 – Refurbishment & extension of the existing premises
Option 3 – New build on a different location within the existing site & retain the existing sports hall
Option 4 - New build for the premises on a different location within the existing site & new sports hall adjoining the new school building
Option 5 – New build for the premises on the land east of the recreation ground including new sports hall
Option 6 - New build for the premises on the recreation ground that has been offered to NCC adjacent to the site & offer the recreation facilities elsewhere

3.2.1 Methodology

All sites with the potential to accommodate the schools were identified through an initial search using plans, followed by a physical search of the area. The sites were then appraised in a systematic manner by application of nine criteria to produce a score for each in order to grade any suitable options.

3.2.2 Appraisal Criteria

i) Ownership

Established where possible from existing County Council records and reference to title documentation.

ii) Site capacity

All the options described are capable of being located on the sites as mentioned.

iii) Planning

In consultation with County Council planning staff, a number of matters were considered in assessing the appropriate score. These included the following:

- Green belt issues
- Settlement boundary / open land issues
- Accessibility / transport
- Highways and parking
- Landscape impact
- Impact on nature conservation
- Impact on archaeology / historic heritage
- Adjacent land uses and potential impact on residential amenity
- Contaminated land issues
- Asbestos

iv) Access & Transport

County Council Highway Officers are to be consulted to discuss the road access, proximity of junctions and public transport services.

v) Timescale

Scores applied to reflect the estimated period required to acquire the site, without obtaining planning permission.

vi) Acquisition Cost

Involved consideration of existing use and planning consents, ownership and use allocation within the Local Plan.

vii) Title Investigation

Carried out wherever possible using a title report from Womble Bond Dickinson. Any title defects are reflected in the scores applied.

viii) Location

Accessibility for pupils.

ix) Support from Schools

Level of buy in from the schools involved.

3.2.3 Scoring criteria

- Scoring is on a scale of 1- 10.
- In relation to ownership, planning, access, timescale, acquisition cost and title investigation, a higher score is indicative of a positive contribution to scheme deliverability, with 10 representing no barriers to deliverability arising and 1 representing a significant level of added difficulty or risk to deliverability arising from that aspect.
- In relation to capacity and location, a higher score is indicative of greater levels of suitability in meeting the requirements of the scheme, with 10 representing the scheme needs being fully met and 1 representing the scheme needs being unmet.
- In relation to the support from schools' criteria, a higher score is indicative of a greater level of buy-in from the school, with 10 representing full support and 1



representing no support from the school. A negative number suggests not just a lack of support but active resistance.



Option 1 – Do minimum & back log issues		
Criteria	Comments	Score
Ownership	Current site in NCC ownership	10
Site Capacity	Current site is large enough to cater for the school, with sports fields and has scope for future expansion	10
Planning	Limited planning implications required for mobile classrooms	8
Access	Access is already in place to the site from Acklington Road, although the access causes issues around drop off /pick up times	5
Timescale	No implications as the site is already in NCC's ownership	10
Acquisition Cost	No acquisition costs	10
Title Investigation	No title implications	10
Location	The site is well positioned close to the town centre and residential premises within Amble	9
Support from schools	The school are supportive of utilising the existing site	10
Appraisal Score		82

Advantages	Disadvantages
No associated acquisition costs or other site-related implications	Only minor improvement to community facilities
Use of the current site continues undisturbed	
Use of current site within NCC ownership therefore works can commence at any time	
Prominent position of schools on the site	

Option 2 - Refurbishment & extension of the existing premises		
Criteria	Comments	Score



Ownership	No implications - site in NCC ownership	10
Site Capacity	Current site is large enough to cater for the school, with sports fields and has scope for future expansion	10
Planning	Proposed works to be discussed with planners, but not likely to cause an issue	8
Access	Access is already in place to the site from Acklington Road, although the access causes issues around drop off /pick up times	5
Timescale	No implications as the site is already in NCC's ownership	10
Acquisition Cost	No implications	10
Title Investigation	No implications	10
Location	The site is well positioned close to the town centre and residential premises within Amble	9
Support from schools	The school are supportive of utilising the existing site	10
Appraisal Score		82

Advantages	Disadvantages
No associated acquisition costs or other site-related implications	Fails to address access issues caused at drop-off and pick-up times.
Use of current site within NCC ownership therefore works can commence at any time	

Option 3 – New build for the premises on a different location within the existing site & retain the existing sports hall		
Criteria	Comments	Score
Ownership	No implications - site in NCC ownership	10
Site Capacity	Current site is large enough to cater both school sites, with sports fields and has scope for future expansion	10



Planning	Proposed works to be discussed with planners, but not likely to cause an issue	6
Access	Access is already in place to the site from Acklington Road, although the access causes issues around drop off /pick up times	5
Timescale	No implications as the site is already in NCC's ownership	10
Acquisition Cost	No implications	10
Title Investigation	No implications	10
Location	The site is well positioned close to the town centre and residential premises within Amble	9
Support from schools	The school are supportive of utilising the existing site	10
Appraisal Score		80

Advantages	Disadvantages
No associated acquisition costs or other site-related implications	Fails to address access issues caused at drop-off and pick-up times.
Likely to be successful in planning terms	
Use of current site within NCC ownership therefore works can commence at any time	
Site offers space to accommodate the optimal amount of sports pitches	

Option 4 – New build for the premises on a different location within the existing site & new sports hall adjoining the school building		
Criteria	Comments	Score
Ownership	No implications- site in NCC ownership	10
Site Capacity	Current site is large enough to cater for the school site, with sports fields and has scope for future expansion	10
Planning	Proposed works to be discussed with planners, but not likely to cause an issue	6



Access	Access is already in place to the site from Acklington Road, although the access causes issues around drop off /pick up times	5
Timescale	No implications as the site is already in NCC's ownership	10
Acquisition Cost	No implications	10
Title Investigation	No implications	10
Location	The site is well positioned close to the town centre and residential premises within Amble	9
Support from schools	The school are supportive of utilising the existing site	10
Appraisal Score		80

Advantages	Disadvantages
No associated acquisition costs or other site-related implications	Fails to address access issues caused at drop-off and pick-up times.
Likely to be successful in planning terms	
Use of current site within NCC ownership therefore works can commence at any time	
Site offers space to accommodate the optimal amount of sports pitches	

Option 5 – New build for the premises on the land to the east of the recreation ground including new sports hall		
Criteria	Comments	Score
Ownership	No implications - site in NCC ownership	10
Site Capacity	Current site is large enough to cater for the school, with sports fields and has scope for future expansion.	10



Planning	Proposed works to be discussed with planners, but not likely to cause an issue. Sport England to be consulted on the loss of the pitches but exception met if equal playing pitch provided elsewhere on site	5
Access	Access via Acklington Road with a new access needing to be created to the site. Park & stride option from the existing car park on the current school site through the recreation land to allow for sufficient parking, buses & drop off/pick ups	9
Timescale	No implications as the site is already in NCC's ownership	10
Acquisition Cost	No implications	10
Title Investigation	No implications	10
Location	The site is well positioned close to the town centre and residential premises within Amble	9
Support from schools	The school are supportive of utilising the existing site	10
Appraisal Score		83

Advantages	Disadvantages
Addresses the access issues caused at drop-off and pick-up times.	Potential Sport England objections to the loss of playing field land, although this can be provided elsewhere on the site
No associated acquisition costs or other site-related implications	New access will need to be created to the site and consultation with Highways team
Likely to be successful in planning terms	
Use of current site within NCC ownership therefore works can commence at any time	
Site offers space to accommodate the optimal amount of sports pitches	



Option 6 – New build for the premises on the recreation land that has been offered to NCC adjacent to the site & relocate the recreation facilities elsewhere		
Criteria	Comments	Score
Ownership	Part of the land in private ownership. Also, potential complications due to Lottery funding on the site and Charities Act for transfer of the land	3
Site Capacity	Site will have scope for future expansion while accommodating all facilities on one site, as well as the option to obtain a capital receipt by selling the brownfield land that wouldn't be required	10
Planning	Site will require development on open space recreation land and protection against the restrictive covenants that are placed on the land through indemnity insurance, which will require further investigation and expense to see if the insurance can be obtained which isn't a certainty	7
Access	An access is already in place from Acklington Road that can be redeveloped or redesigned to suit the scheme	9
Timescale	Potential delays due to agreeing terms with the Trust & the transfer of the land taking place. Also, investigations into the restrictive covenants on the site & whether indemnity insurance can be obtained, along with Charities Act & Lottery funding discussions which could cause obstacles & delay. The recreation facilities on the existing site will need to be re-provided elsewhere for the use by the general public and current sports teams	3
Acquisition Cost	The acquisition cost of this land is currently unknown at this stage.	5
Title Investigation	The title is subject to two restrictive covenants – the 1931 covenant states that the land is only to be used for recreation or pleasure ground and the 1953 covenant states that the land is to be preserved for the recreation and enjoyment of the public of Amble forever. As we are not able to locate the beneficiaries, the legal advice received is that Indemnity Insurance could be the best course of action to cover the Council should we develop this land, however further investigation is required to ascertain whether this could be obtained	3



Location	The site is well positioned close to the town centre and residential premises within Amble. With the new site being directly in between the two sites which would improve the accessibility	10
Support from schools	The school is keen to see the redevelopment of the site to create improved facilities and the benefits that the redevelopment will bring	10
Appraisal Score		60

Advantages	Disadvantages
Site offers potential for further expansion if needed in the future	Potential uncertainty and sources of delay to timetable but possibility to minimise risk through indemnity insurance
Less disruption to the school operation whilst the works are taking place	External Trust involved with the transfer of the land so would be subject to their board approval & Charities Act approvals
Site offers space to accommodate the optimal amount of sports pitches	Loss of recreational facilities whilst the works take place to build the school
	The cost of purchasing the land is currently unknown, meaning the initial outlay of funds to purchase the site and additional time for valuations & negotiations to take place

Table 3C: Option Appraisal Results

Rank	Option	
1	Option 5 - New build for the premises on the land east of the recreation ground including new sports hall	83
2=	Option 1 – Do minimum	82
2=	Option 2 – Refurbishment & extension of the existing premises	82



4=	Option 3 - New build for the premises on a different location within the existing site & refurbish sports hall	80
4=	Option 4 - New build for the premises on a different location within the existing site & new sports hall adjoining the school building	80
6	Option 6 - New build for the premises on the recreation land that has been offered to NCC adjacent to the site & relocate the recreation facilities elsewhere	60

3.3.4 Preferred Option

Options 1-5 are all scored similarly due to the land implications all being the same with the site being within NCC's ownership and control. The decision on the preferred option will depend on the design preferences for the development, including working within an operational school, position of the buildings, location of services & demolition of existing buildings. Contractor's access & site compounds need to be considered along with safeguarding and the loss of any car parking whilst the works take place. On this basis, Option 5 is the preferred option.

There is uncertainty over Option 6, which has the potential to delay the scheme and obstacles to overcome to make it viable. There are potential issues with the restrictive covenants on the site.

Option 5 represents the best opportunity to realise several improvements that will benefit the school and NCC. These are included below:

- The cost saving offered by a new-build, energy efficient school and newly refurbished school
- Scope to accommodate a growth in numbers or any future changes
- Creating an environmentally friendly school building that responds to the current climate emergency and the removal of an inefficient and wasteful building
- Improve access & parking within the site and flow of the schools
- Prominent position on the site

It is accepted that development on the recreation land and acquiring land from a third party brings additional risks & expense to the project in terms of potential impact on the timetable and deliverability. It is possible to mitigate the risks associated with the acquisition through early negotiation of the terms and indemnity insurance, subject to relevant matters such as obtaining satisfactory planning permission and satisfactory results of site investigation surveys, however these risks meant that Options 1- 5 were more viable options.

This can be achieved in parallel with ongoing design work, with the risk of abortive legal and project fees if the matter is not concluded in an acceptable timeframe, or if planning permission is not forthcoming. Unfortunately, the risk remains regarding planning. The opportunity to secure a site that offers the benefits highlighted above and that will serve



the schools and wider community more appropriately both now and into the future, warrants a degree of speculation.

3.3 Land Ownership

Table 3A below shows a summary of the ownership status of the sites covered by the review:

Table 3A: Site ownership status

James Calvert Spence College Acklington Road site	NCC freehold
James Calvert Spence College South Avenue site	NCC freehold
Recreation Land	Amble Development Trust

3.4 Potential Land Acquisition Costs

3.4.1 Market Values of Potentially Surplus Sites

Table 3E: Site Valuations

Property	Total Area (Hectares)	Valuation
Land south east of New Hall Farm, Amble	7.7	Between £410,547 and £586,832 per hectare
Land at Gloster Hill, Amble	1.1	Between £475,000 and £515,000 per hectare

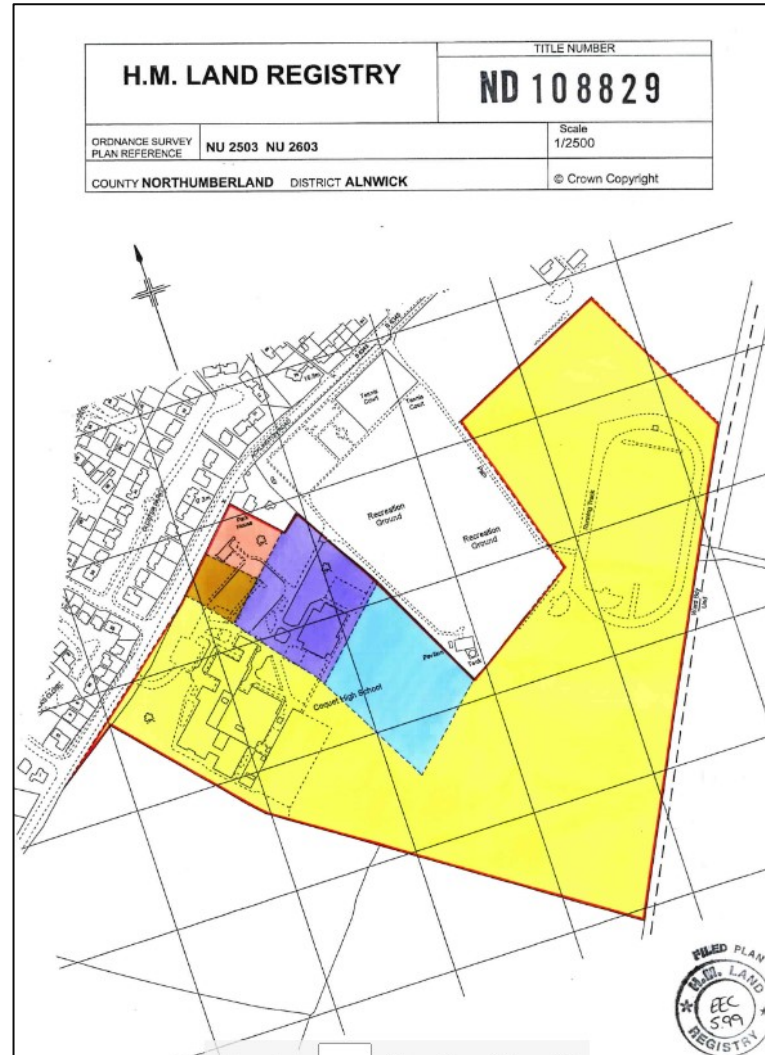
3.4.2 Valuation Assumptions

- The value included above is a high-level figure for estimation purposes only and final value will ultimately depend on a range of factors
- Planning permission is granted in respect of redevelopment without any onerous conditions
- There are no adverse site investigation results
- Assumes Planning and other consents will only be achieved



3.5 Planning Commentary

3.5.1 Existing James Calvert Spence College Acklington Road Site



Constraints

- Works taking place on an operational school site & safeguarding considerations
- The position of a new building will be to the side of the existing school building so won't be in the preferred location
- Temporary access will need to be created for contractors & site compounds which could temporarily taking away part of the playing fields
- Additional parking may need to be provided for staff
- Mobile classroom village created on site which will take away a small part of the playing fields
- The works will have some impact on the residents as the works will be taking place towards the front of the site
- Position of the services & connections
- Sport England & DfE to be considered
- Highways considerations in relation to site access

Key Issues

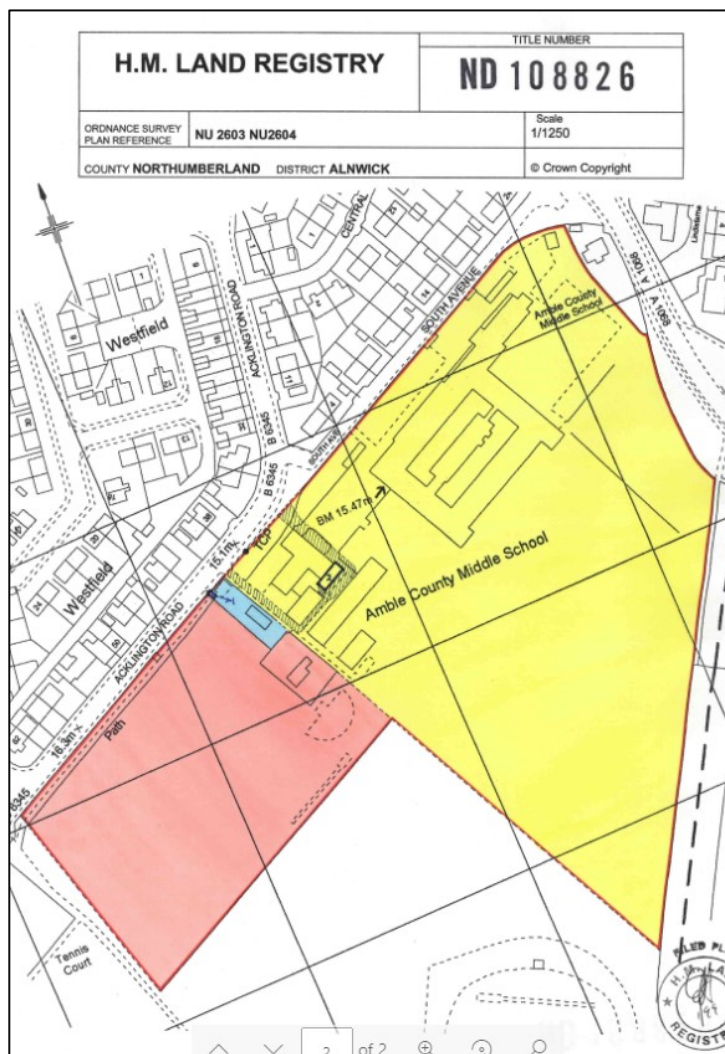
- The site is currently in the settlement boundary, so the principle of the development is acceptable here
- Currently used as a school so preferable in planning terms

Ecology Comments

- £ Ecology colleagues to be consulted on the proposals
- £ School buildings often have cladding and other features which can be used by roosting bats and nesting birds.
- £ It is recommended that bat and bird surveys are undertaken at the site and updated regularly thereafter. This will begin with an ecological appraisal (daylight) survey followed by activity (dusk/dawn surveys).
- £ If bat roosts are discovered a Natural England Protected Species Mitigation License will be required prior to demolition or works affecting the roosts.



3.5.2 Existing James Calvert Spence College South Avenue site



Constraints

- The use of the land east of the recreation ground for the new school building will mean the loss of playing field land which will require Sport England consent, however there is a large area of playing field land on the site meaning these pitches can be provided elsewhere
- The pupils from the South Avenue school will need to be decanted into the Acklington Road buildings and mobile classrooms whilst the refurbishment works take place to their buildings

Key Issues

- Currently used as a school so preferable in planning terms
- The refurbishment works could be time consuming and find additional issues to be rectified during the works



Ecology Comments

- Ecology colleagues to be consulted on the proposals
- Trees to South Avenue and existing hedgerows on the site should be retained as far as is possible in the design to avoid harm to features which could be used by protected species such as newts and bats.
- The cost of extensive surveys can be reduced if good design principles are used to avoid harm, so maintaining the tree lined boundary and minimising light spill onto that boundary automatically removes the risk to bats foraging routes and reduces the need for extensive survey.

3.5.3 Recreation land to be acquired



Constraints

- The land is to be acquired from Amble Development Trust, so is subject to their board approval



- The land has two restrictive covenants on the land which prevent development, however we have been unable to locate the beneficiaries and are obtaining legal advice on the best way to proceed including obtaining Indemnity Insurance to cover NCC should the site be developed
- Lottery grant & Charities Act to be considered and any obstacles this may bring up with transferring the land & whether any land has to be transferred back to the Development Trust or Market Value paid for the site
- The recreation land, play equipment, Multi Use Games Area (MUGA) and football pitches will need to be reprovided elsewhere on the school site, which may result in a temporary loss of facilities or issues with local residents who use this site
- Planning advice will need to be obtained to see whether planning permission would be granted to develop this land

Key Issues

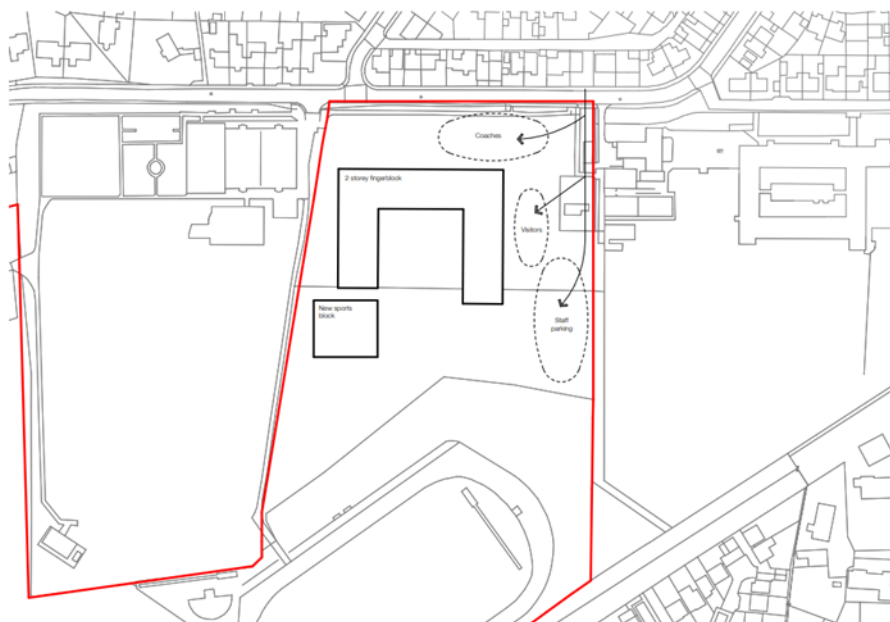
- Planning advice will need to be obtained to see whether planning permission would be granted to develop this land & whether the land is designated as open space & if so whether it can be relocated elsewhere
- The works are taking place closer to some different residents' properties, so any noise & dust nuisances to be considered

Ecology Comments

- Ecology colleagues to be consulted on the proposals
- Trees to Acklington Road and existing hedgerows on the site should be retained as far as is possible in the design to avoid harm to features which could be used by protected species such as newts and bats.
- The cost of extensive surveys can be reduced if good design principles are used to avoid harm, so maintaining the tree lined boundary and minimising light spill onto that boundary automatically removes the risk to bats foraging routes and reduces the need for extensive survey.

3.5.4 East of the Recreation Ground Site





Constraints

- New access will be required to be installed from Acklington Road, so discussions with Highways required.
- The works are taking place closer to some resident's properties, so any noise & dust nuisances to be considered.

Key Issues

- Currently used as a school so preferable in planning terms.
- The use of the site will allow the existing site to remain operational and less disruption caused.
- The site will allow the contractor to gain access & have a site compound on site.

Ecology Comments

- Ecology colleagues to be consulted on the proposals
- Access will need to be created within the hedgerows on the site with the remaining hedgerows retained as far as is possible in the design to avoid harm to features which could be used by protected species such as newts and bats.
- The cost of extensive surveys can be reduced if good design principles are used to avoid harm, so maintaining the tree lined boundary and minimising light spill onto that boundary automatically removes the risk to bats foraging routes and reduces the need for extensive survey.

3.5 Planning



- Planning have been consulted and are comfortable with all the options proposed and don't see any potential issues
- Any ecological survey should be completed with reports and any mitigation proposed submitted with a planning application.
- Without adequate survey there may be delays to determination.

3.6 Biodiversity Net Gain

- The Environment Bill 2021 includes a mandatory requirement for Biodiversity Net Gain for planning applications. There is a two-year implementation period, but it does make sense to forward plan for the mandatory requirement, carry out a Biodiversity Net Gain Assessment (via the DEFRA metric) and plan for how biodiversity loss can be avoided, and gain can be maximised through design.
- If the development as proposed is impacting areas of arable field, buildings, amenity grassland and hard standing this would be reflected as a very low unit value calculated using the DEFRA metric. The addition of loss of natural habitats such as hedgerows and tree lines would increase the net loss value which would need to be compensated for.
- This not only includes avoiding loss and impacts on habitats (which as discussed above saves costs and reduces the need for licensing and site supervision and delays whilst waiting for licences) but reduces the need to find biodiversity net gains on the site or to offset on other land within the Council's control.
- It is essential that ecologists are involved in the early stages of the design process to reduce risks to the project and save costs and delays further along the project timetable.



3.7 Summary

Although options 1-5 are all scored the similarly for the land implications, Option 5 of developing the school on the land to the east of the recreation land is proposed as the best option as the land is already an operational school site within NCC's ownership, therefore will give more certainty around developing the site & planning permission. The new building can be located on the playing field land meaning less disruption to the operational school and more space for the contractors site compound and access whilst the works take place. Also close to the main road for access to the existing services and allows the building to be built in a prominent position on the site. This option also brings the two school sites closer together.

Option 5 is considered to be the best option to deliver a scheme that meets the needs of the school both now and in the future and allows for the creation of a modern, environmentally conscious building with enhanced facilities that benefit both the school and the local residents. With options 3 & 4 considered to be the best alternative options should any issues be raised by developing on the playing field land or access issues to the site. Option 1 wouldn't be supported & Option 2 would cause a lot of disruption and should only be considered as a last resort.

The surrounding housing will require sensitivity in the design but does not present a significant obstacle.

Option 6 of acquiring the recreation land was considered, as it would allow the building to be developed also with less disruption and would bring the sites closer together, however there was a lot of uncertainty to overcome, potential delays to the scheme & more risks involved due to the restrictive covenants on the land and land needing to be acquired for market value. Also, the temporary loss of the facilities whilst the development takes place which could cause issues with the residents who currently use the site and the local football clubs would need to be relocated onto the school pitches in the meantime and additional safeguarding would need to be implemented.



4 DESIGN AND CONSTRUCTION

Section 4 and **Appendix 4** of this Outline Business Case describe the design options and investigative survey work undertaken to demonstrate feasibility.

4.1 Introduction

Since the appointment of the design team in September 2019 we have worked closely with the Executive Headteacher of JCSC, the school leadership and Northumberland County Council's project team, to develop a space budget and explore design options to optimise the development opportunity.

NCC has committed to invest in the replacement and refurbishment of school buildings for the Coquet Partnership. Over the last few months, council officers have been talking to headteachers and school chairs of governors to gain their views on the current educational structure within Coquet. Whilst there were some varying responses, school leaders all agreed that it is now the right time for the views of everyone within Coquet, with an interest in education, to be captured.

The schools have asked the council to carry out a wider consultation with parents, staff, governors, pupils and the wider public. The consultation documents are available to all and set out the key issues faced by schools in the Partnership and asks for views on whether the current structure or the proposed primary / secondary school structure would deliver a good and sustainable school system in the Coquet area.

In anticipation of the outcome of the public consultation, the impact of the proposed new structure has been assessed. This report is the first of three reports. The second report focuses on repurposing the existing James Calvert Spence Middle School as a new Primary and special education needs and disabilities facility (SEND) the third a study on the impact of the primary / secondary model on the current first schools in the Partnership.

This report focuses on the impacts of the formation of JCSC for pupils aged 11-18.

4.1.1 Education Brief

The education brief has been developed in great detail and has been used as a template to explore the design options, test typologies and site strategies. Extracts from the brief follow with the full document in Appendix 4A.

In summary the existing and/or new building(s) are required to provide accommodation to support the following pupil and staff numbers:

Student:



- 11-16: 600
- Sixth Form 120

Total: 720

Staff:

- 46 FTE teaching staff and 49 FTE support staff.

The overall 'new build' target area is 6,359sqm, which is required to deliver the design brief included an enhanced provision in food technology to support T-level catering and the provision of a new four court sports hall in lieu of a three-court hall generated from the baseline standard schedule of area.

Vision, Ethos and Values

Values:

At James Calvert Spence College, the school values are the foundation of the school community on which they build every other aspect of their school. They expect all members of our community to:

- Aim High
- Work Hard
- Be Kind

Ethos:

We firmly believe in the potential of every single student and that each one is capable of achieving great things. We want our students to leave us confident, well-rounded and well qualified. We will prepare students to go out into the world and seize every opportunity.

Vision:

The vision for the new facilities is that the building(s):

- provides the best educational opportunities for our students.
- supports us as the school of choice for the area, with kerb appeal that inspires the community to embrace it
- enables students to have great experiences and achieve excellent outcomes
- develops the whole child – enrichment opportunities, pastoral support, SEN, sport
- environment that supports is innovative, promotes opportunities and excellence.
- supports high quality teaching and learning resulting in better student outcomes



- makes students want to learn here
- makes people want to work here, enhancing the recruitment and retention of high-quality staff
- retains and further enhances the characteristics that make James Calvert Spence College such a special place
- warm, friendly environment where all members of our community are known and feel valued

The school needs to:

- be an economical and environmentally friendly building where heat can be controlled by zones and have sufficient ventilation and natural light.
- be modern, welcoming and open – we want open spaces where people can be seen rather than long corridors where they can be lost. Wider, open corridors should create informal social areas.
- allow people to flow between areas without congestion or travel through unsupervised spaces.
- facilitate positive student behaviour via passive supervision throughout the building by the positioning of offices with glass walls for members of the leadership and pastoral teams, communal staff spaces and directorate workspaces
- support students to feel safe in changing rooms and WCs.
- have external spaces that shelter students on their arrival to school and during breaks and lunches, especially during inclement weather that's often experienced at the coast.
- have catering facilities that encourage students to eat with friends, promoting wellbeing and healthy eating.
- have modern facilities that allow the very best quality of teaching and learning through being spacious, with comfortable furniture, and ICT available in all learning spaces when appropriate.
- have enviable sixth form facilities that make our year 11 students want to stay and encourages students from other schools to join – both in terms of teaching spaces, social areas and study spaces.
- have a library at the heart of the school, easily accessible by all students from all teaching spaces.
- have staircases that are clearly visible from nearby classrooms and staff spaces and with no spaces for students to hide.
- have specialist facilities that enable us to provide courses that meet the needs of our students' aspirations and fit the profile of the local labour market – particularly catering, engineering and ICT.
- have specialist facilities that enable us to continue providing courses that are our strengths – particularly art, design & fashion, and sports.



- provide leisure facilities for our community to access outside of school hours including a MUGA, tennis courts, sports hall and for the existing running track to be retained and upgraded.
- enable our community to access limited teaching spaces so that evening classes could be delivered in traditional classroom-based subjects, cooking, ICT and art.

Community Use:

The sporting facilities are used extensively by the local community and, with the expected surge in housing in our catchment area, it is expected the demand will grow further. The sports hall is fully booked every evening and the football pitches are also well used. There is a 400m running track on site, however, it is in a state of disrepair and unsafe to be used by students or the community. There have been several approaches from members of the community and local running clubs asking for access to this facility, and the school are keen to be able to provide this following a significant investment.

There is a desire to expand sporting facilities further to support the community in terms of health and wellbeing, and to introduce more members of the catchment to the school who may not otherwise visit and appreciate what is on offer. Amble is a growing town with limited sports facilities and recreation areas. JCSC has a sports hall and football pitches, Amble Development Trust has a field that can be used by the community and hosts a small play park and skate park. Beyond this, there is little else and this is not acceptable for a town the size of Amble and residents have to travel to neighbouring towns to access facilities, with the nearest leisure centres in Alnwick [9.6 miles] or Ashington [13.1 miles]. This is a detriment to the community, particularly children, if they face barriers to access due to no transport, for example. Over 37% of students in Y7 and above are eligible for pupil premium and in the 21st century with the cost of living surging, investment should be made into the facilities for the community of Amble and surrounding areas that are accessible to all.

State of the art facilities would be welcomed by the whole community and generate a source of income for the school ongoing. The school will continue to make letting fees competitive and work with community groups to secure grants or other funding opportunities to enable more people to utilise the facilities. It is envisaged that a new build or redevelopment will provide the following facilities for students and potential community use:

- MUGA with flood lighting
- 3G pitches with flood lighting
- Resurfaced running / athletics track
- Football pitches
- Rugby pitch
- Tennis courts
- A fitness suite with gym equipment



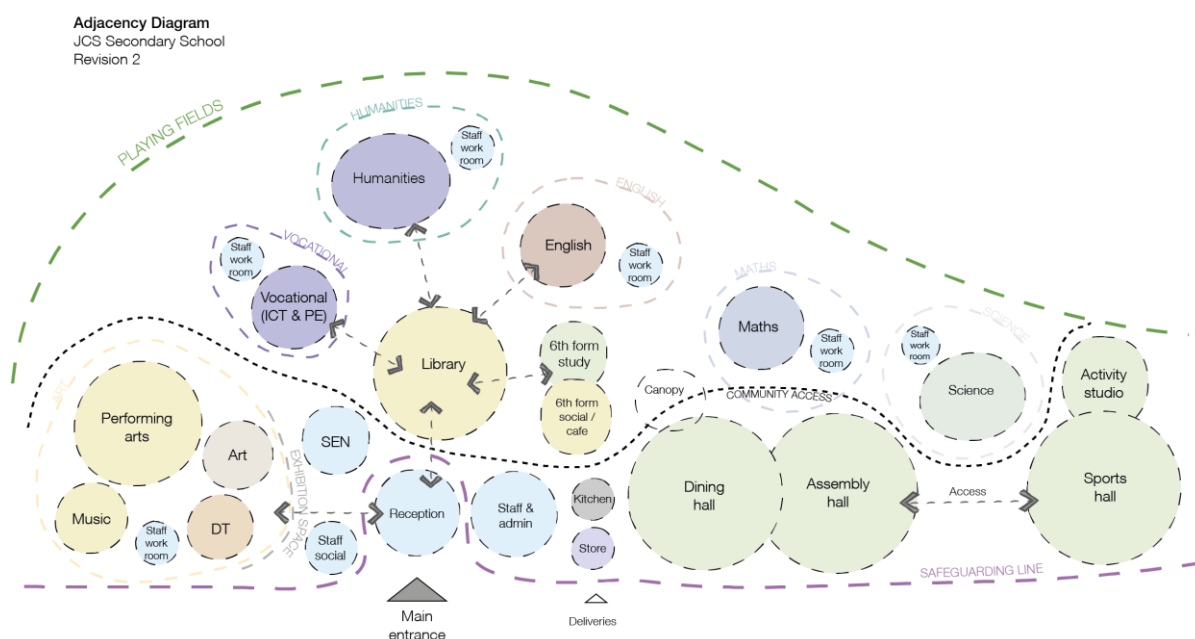
There is a desire to offer evening classes to the community in classroom-based subjects (such as English and maths) and to use the practical resources to offer adult education in subjects such as art and ICT. The current building does not allow this to happen easily or securely due to the layout and access points.

Curriculum Provision:

The new secondary school is arranged in six directorates.

- English
- Maths
- Science
- Humanities
- Vocational including ICT and PE
- Arts including Design and Food Technology Music and Performing Arts

There are specific interrelationships between directorates which are reflected in our adjacencies diagram, used to support the development of the school vision and visualise spatially.



Flexibility:

Flexibility and future proofing are important considerations. The school will need to be able to respond to ever changing curriculum demands, teaching styles and demographic changes. As such the new or refurbished building(s) need to be easily reconfigured and if required extended in the future without disrupting the education provision.

Relationship with the external environment:

The relationship with the external environment is important. The school building(s) need to be arranged to encourage students to move around the site freely and be confident to engage with different landscape settings whether for formal play, recreation or for quiet contemplation.

4.2 Surveys and Investigations

This is the section of the OBC details the results of these surveys which have been undertaken as part of the feasibility exercise and summarises the outcomes of these. Copies of these reports can be found in Appendix 4.

The project team, together with the LA identified a list of surveys and investigations, which have been instructed and undertaken:

- Site Investigation Desktop Study
- Preliminary Ecological Appraisal and Bat Survey
- Arboricultural survey
- Topographical survey
- Utilities survey
- FF&E including technology audit
- ICT Audit

The summary of findings and recommendations of each of the above is identified below.

4.2.1 Survey Summaries

Survey	Comments / Risks
Site Investigation Desktop Study	<ul style="list-style-type: none"> • Relatively flat site. Level changes north of the existing running track towards the main road. • Potential coal seams below the site which will need further investigation • The site is not within a zone of flooding • Phase 2 investigation to be undertaken to determine contamination and ground make up
Preliminary Ecological Appraisal and Bat Survey	<ul style="list-style-type: none"> • Bats – Possible bat roosts. Further surveys required along with transect surveys and remote monitoring. • Birds – potentially located in flat roof sections of the building. • Botanical – further surveys to review the grasslands
Arboricultural Survey	Refer to appendix 4D
Topographical Survey	Refer to appendix 4E
Utilities Survey	Refer to appendix 4F



FF&E including technology audit	<ul style="list-style-type: none"> • 86% of the loose furniture can be re-purposed in the next 5 years • 64% of the existing DT equipment to be re-purposed • 66% of the catering equipment to be re-purposed
ICT audit	Refer to appendix 4H

4.3 Design Journey

During the design journey we explored the opportunities to redevelop the existing site and an adjacent site assessing the advantages and disadvantages of

- minimum option tackling the backlog maintenance issues
- refurbishing and remodelling the current estate and upgrading the external environment.
- building a new teaching block building on the existing site, retaining and upgrading the existing sports hall, and upgraded external environment.
- build a new teaching block with a new integrated sports hall provision and upgraded external environment.
- Develop new building(s) and external environment on the site east of the recreation ground.
- Develop new building(s) and external environment on the recreation ground.

4.3.1 Design Drivers

To inform the OBC we have looked at each option in the context of

- Education drivers and ethos
- Site capacity and compliance with BB103
- Impact of the development on neighbouring properties
- Buildability
- Phasing
- Disruption
- Programme
- Cost
- Sport England support
- Planning support
- Highway's impact

4.3.2 Issues Log

The issues log is based upon feedback from the school and our observations when we have walked the site and observed the school during the working day along with information provided by the local authority.



Physical Arrangement issues:

- Arrival experience is underwhelming
- Bus turning circle anecdotally is poor
- Secure lines are difficult to supervise
- Circuitous and confusing internal circulation routes.
- Narrow corridors
- Poor passive supervision
- Directorate teaching spaces spread across the school which impact working patterns and directorate unity
- Shortage of staff work rooms for each directorate
- Too many isolated areas making it difficult to manage and supervise.
- Inadequate poorly distributed WC provision
- Under provision of staff WC's and all of poor quality
- Very difficult to be on duty at toilets and actually see what is going on.
- Noise pollution from the quadrangles into teaching spaces
- Under provision of teaching spaces
- Reliance on mobile provision
- Multiple entrances / exits from social areas – so students can hide from staff
- No dedicated assembly space

Environment:

- Limited natural light in many teaching spaces
- Poorly proportioned and undersized teaching spaces
- There is excessive overheating in the summer and heat loss in the winter
- Glare issues
- Lighting controls inadequate
- Evidence of roof leaks
- Exposed site.

Legislative Issues:

- Some first-floor areas are only accessed by a single staircase and not as such compliant with current fire and building regulations. There are rooms within rooms
- There is poor acoustic separation between spaces
- Poor ventilation, anecdotally CO2 levels within classrooms being at an unacceptable level
- Electric load is anecdotally under capacity.
- Access for all issues

Infrastructure:

- Drainage infrastructure is crumbling



- Lack of ability to communicate within school in emergency situations.
- External fabric is at the end of its useful life
- Not enough power and data outlets
- IT infrastructure inadequate

External Environment:

- There are a large number of internal courtyards, and the social spaces are very close to teaching spaces. Lunch and break time supervision is difficult and there are a lot of opportunities for antisocial behaviour to take place out of general view
- All weather running track and other similar facilities (long jump / high jump areas) have not been maintained and as such is unusable
- Tennis courts are in need of refurbishment or replacement
- Site location and orientation of buildings means that playground areas can be exposed to cold winds, which impacts useability
- Inefficient use of space in external environment, with large areas of mown grass (not playing field) not well-located for use as teaching or social spaces
- The condition of some surfaces and areas is poor
- Fencing is extensive and hard to maintain

4.4 Options

Existing Site Arrangement

The school sits on the edge of Amble, a coastal town in north Northumberland. The site that the school occupies is ostensibly flat and the boundary is defined by Acklington Road to the north, beyond which are residential properties. There are open fields to the south and west. The eastern boundary is defined by a public recreation ground and in part, by the boundary of a medium size family home.

The school building is set back from the road providing enough space for the access road to sweep into the site. The car parking and coach drop off is quite extensive and sits between the road and school and sports hall. Beyond the school building are the playing fields which are extensive. An assessment has been carried out in regard to the current infrastructure particularly the site access, staff, pupil and visitor arrival parking numbers bus drop off and safeguarding.

The school is a mixture of two and single storey volumes that are arranged around courtyards or semi enclosed spaces, with a standalone sports building. The basis of the current plan is a design of clusters of accommodation around WC pods or open plan spaces, akin to a school within a school model. The plan is over complex and difficult to navigate when compared with many school designs.



The footprint is large for its total area and the external envelope steps in and out creating a disproportionately large external envelope and the roof scape is complex.

Access

Pupil access is facilitated by two pedestrian access points off Acklington Road either side of the vehicular bell mouth. The route to the west leading down the edge of the site to hard standing areas and student entry points. The route from the west cuts across the access road toward the main entrance. Pupils arriving by coach alight on the pavement side leading to a series of pathways that lead to hard standing areas and more pupil entrances. These access points avoid pupil/vehicular traffic crossover beyond the site edge but do rely on a cross over on the access road within the site for the car parking for staff and coach parking that run across the site frontage.

External Provision

The site is generous and can support the following provision to meet or exceed BB103. The site area is just over 12 hectares, of which just over 7 hectares (70,779m²) is currently used as playing fields. There is a playground area between the tennis courts and sports hall which is the main space for informal outdoor use. Whilst meeting the BB103 guideline area for 'hard informal and social space' it is reportedly subject to crowding particularly when weather conditions make the playing field less accessible. Between the tennis courts and school building is a 'growing and habitat area' with greenhouse, small wildlife pond etc. somewhat underused and overgrown.

The current external sporting provision is as follows.

Grass pitch provision, marked out in different permutations of pitch numbers and alignment depending on time of year etc. As an example, there is sufficient space for at least

- 4 full-size football pitches
- 2 reduced-size football pitches
- 1 cricket field

Other field sports could be supported including rugby.

Other green space to support Athletics including

- Rounders (juniors)
- Space for training grids

All weather provision

- 400m all-weather running track with additional facilities including javelin, 2nr high jump, long jump and triple jump (all in poor condition)



- The grassed area inside the all-weather pitch could also accommodate a full-size football pitch (included above)
- Multi-use games area (MUGA) with 4nr tennis courts

Social provision

- Informal hard and soft play areas

Vehicular movement

- Coach drop-off and pickup (space for 5nr coaches), staff and student parking including accessible parking (65nr spaces including 2nr accessible bays)

4.4.1 Option 1 Retained estate and back log maintenance

The move from a three tier to a two-tier system means that there is not an option to do nothing. By the very nature of the change more accommodation is required on the site to facilitate the aspirations of the Coquet Partnership.

Retaining the estate would fall short of the accommodation required to create a new secondary school on the JCSC site. Additional mobile classrooms would be required during the transition period. The existing estate would be weather tight when the back log maintenance was complete but would still suffer from the inherent issues listed above. The thermal performance is under modern standards and due to the age of the estate the maintenance burden will continue to escalate in relation to the service life of the heating and lighting and the expectation that the roof and windows will need replacing in the near future. This is compounded by the fact that the current estate is a woefully inefficient design, putting ever increasing demands on energy consumption. This option would not tackle the functionality issues that are associated with current building and site layout.

4.4.2 Option 2 Refurbish and Remodel the Retained Estate

The proposal looks to maximise the opportunities within the existing building and the site. We reviewed the accommodation and the internal arrangements comparing the physical arrangement to the organisational adjacencies. The philosophy being that wherever possible existing spaces would be reassigned with limited interventions to improve functionality and create more cohesive directorates. This achieves a good general arrangement of spaces but leads to some spaces falling short of the space standards when compared with a new build solution.

For this proposal to fit with the organisation ambitions of the school it has been necessary to add a proportion of new build accommodation and where feasible propose some interventions within the footprint to improve the sizes of some spaces to comply with current space standards, increase the functionality, and improve the number of WCs for staff and students throughout the building.



However, it has not been feasible for all spaces to be increased to comply with current space standards. To achieve this more fundamental interventions and additions would be required which would not be sustainable within the funding envelope. A full schedule of spaces that remain undersized is included as Appendix 4I.

At this stage it is assumed that to bring the building stock up to current environmental performance standards the retained estate would require the following works: -

- New plant, heating and lighting throughout
- New fire alarm system
- New sprinkler system
- New windows, curtain walling and external doors with improved thermal performance
- New roofs throughout with uplifted thermal performance
- Over cladding of every masonry façade to improve thermal performance and weathering performance
- New ceilings throughout
- New floor coverings throughout
- New internal doors throughout
- Full redecoration
- Improved acoustic separation between spaces assuming over boarding walls in between each teaching space
- Fire strategy enhancements including additional stairs in some locations
- Strip the sports hall back to its structure and fully overclad, plus adding accommodation lacking in the current building.
- New FF&E throughout.

Further studies and surveys

If this option was pursued

- A full review of fire strategies to ensure compliance
- An acoustic review and upgrade strategy
- Intrusive Asbestos survey
- A thermal imaging survey
- Masonry pull tests if over cladding is pursued
- Structural Survey





To provide an appropriate level of sports provision, the proposal includes an artificial Grass Pitch located on the existing field, together with reworking of the existing car park to increase capacity and increased playground area. Other existing sports facilities would be refurbished, principally the all-weather running track (including high-jump and long-jump areas) and tennis courts as necessary.

The existing Playing Field Area as defined by Sport England is 70,799m², therefore the site is well-provided (compared to a BB103 guideline figure of 31,200m²). If there is an overall loss of playing field area, it should be possible to meet one of the Sport England exceptions.

Conclusion

To execute the works the construction would need to be phased over several years relying upon a large number of temporary classrooms to support decanting strategies. On



completion the development would be significantly improved and meet current building standards. It would however still have some of the inherent issues that cannot be fully resolved unless more intrusive interventions were pursued, for example corridor widths would be below recommendations and several teaching spaces would remain undersized. To meet space standards in all circumstances, a much greater proportion of new building and demolition would be required defeating the object of this option.

4.4.3 Option 3 Existing site, New Teaching block and Retained upgraded Sports Hall

This option looks to re-provide all the teaching accommodation in a new teaching block, retain and remodel the sports hall and create a new arrival plaza, new staff and pupil parking and coach drop off would be provides, accessed from the existing site entrance and potential a separate parental drop-off and pick up area out with the secure line. This proposal would look to upgrade the all-weather running track and reconfigure and upgrade the external grass sport provision and create a variety of hard and soft landscape spaces for pupils to play, socialise and explore.

The works need to be carried out while the school remains in operation. To achieve this, we have explored some building typologies that are described below.

4.4.3.1 Superblock

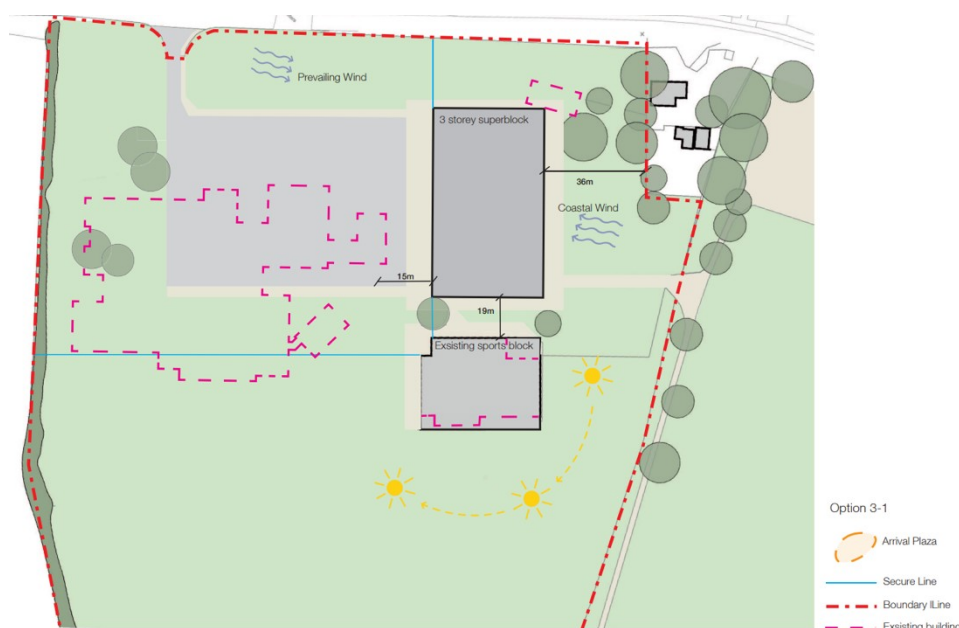
This typology is often the most efficient with the large central shared resources such as halls, LRCs and dining areas to placed inboard while teaching spaces sit at the perimeter. This approach relies upon borrowed natural light and more of the spaces being mechanical ventilated solutions. As such the construction of internal roofs and light wells bring complexities not associated, with more traditional typologies.

This model is most efficient when arranged over three floors.

All teaching facilities are under one roof with the indoor sports facilities provided within the existing standalone sports block or if proven to be more cost effective a new standalone block

The wall to floor ratio is good and circulation tends to be efficient. The relationship with the external landscape is not as positive as the other typologies. Creating separate directorate identities and associated external spaces is not as easy.

If well planned with good distribution, WC's and stair cores can support efficient internal flow and efficient ingress and egress at breaks. and at the beginning and end of the academic day. As this model clusters vertical circulation there tends to be fewer stair cores overall.



This option can support Net Zero in use from the outset or if budgets are prohibitive enable future additions of photovoltaic panels and other mitigation strategies.

Overall passive supervision can be more complex to achieve. The building is less capable of creating shade and shelter and external neighbourhoods and is relatively difficult to extend should the need dictate.

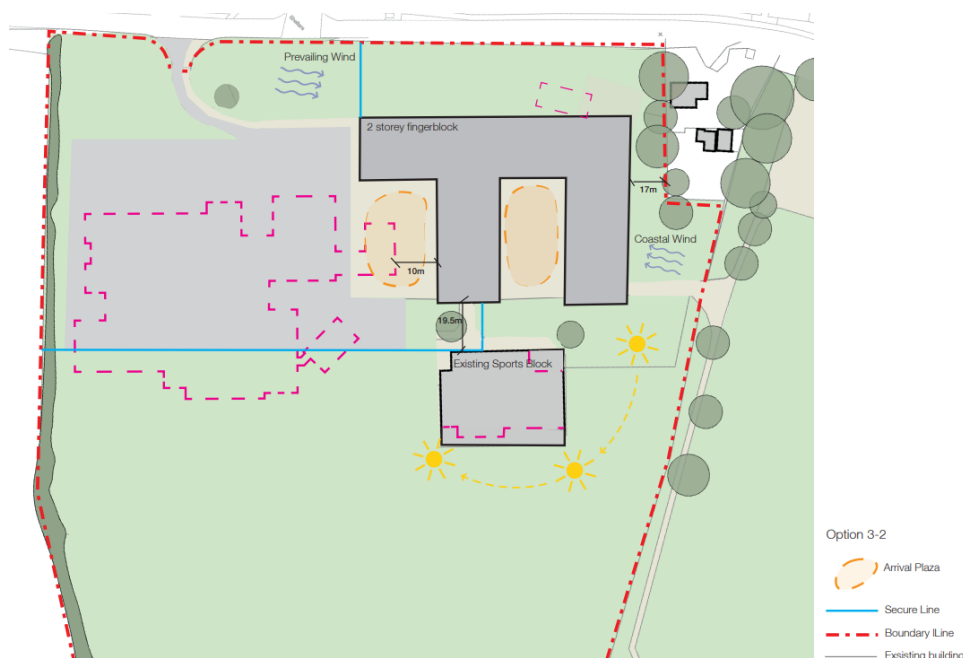
4.4.3.2 Finger/Courtyard model

This typology is effective and enables the majority of spaces to be naturally ventilated and achieve the daylight requirements. The approach enables directorates to generally be located in self-contained clusters adjacent to their staff resource areas. All directorates will be in relatively close proximity to the shared facilities of hall, dining, library etc. aligned to the curriculum offer. All facilities are under one roof other than the standalone sports hall, which could if preferred be integrated into the building envelop.

This typology tends to have a relatively high wall to floor ratio and can put demands on circulation required to connect spaces and by its nature is less compact, but does create good connections to outdoor spaces, enhancing supervision and general surveillance. Spaces between the fingers / wings help to create neighbourhoods which can be used for different year groups and create entrances, congregation points shelter from the elements and ownership. If well planned with WC's and stair cores at the ends of the fingers, good efficient internal flow and effective ingress and egress can be achieved at breaks and at the beginning and end of the academic day.

This typology can meet all the daylight and air quality criteria without relying on complex cross and stack ventilation solutions which lead to numerous roof penetrations and complex steel frames.

This option can support Net Zero in use from the outset or if budgets are prohibitive enable future additions of photovoltaic panels and other mitigation strategies.



This typology is easy to reconfigure without impacting facades and easy to extend if required in the future if the site allows.

This approach has been tested over two and three storeys.

4.4.3.3 Site Arrangement

We have developed a proposal that can be built in the general area occupied by the car park and the bus drop-off. This exploits the virtues of the site and fits the required accommodation into a two-storey building aligning to the advice provided by the planning department. This will enable the school to remain in operation during construction. There will need to be a period in the programme when the sports hall is decommissioned so that it can be stripped back to the frame and reclad.

The construction will then lead to a third phase when the existing school is vacated and demolished to enable the creation of a new landscaped plaza on site parking for staff students and visitors.



The developed solution is a variant of a two-storey courtyard design that provides appropriate frontage to Acklington Road. The principle block runs east west with two wings running north south that create a sheltered space for pupils to safely arrive and congregate prior to entering the building at the beginning of the school day.

The courtyard space would be south facing, creating the opportunity to have external dining as well as social spaces and sheltered outdoor learning to be enjoyed throughout the day. As the school role is not large this space will act efficiently and be easy to supervise, a situation not enjoyed in the current facilities.

With vertical circulation cores at the ends of the wings and along the southern face of the northern block, pupils will be provided with unambiguous access and egress between lessons, breaks and at the beginning and end of the school day.

The northern block houses all the large format spaces, including, sixth form social, kitchen, dining hall, performance, music LRC, T Level Catering and incoming plant with science above. The western most wing houses Food and Design Technology with Art, ICT and Vocational Studies on the first floor. The wing to the west houses, English, Humanities and Maths

To achieve this part of the new building will be built relatively close to the existing buildings.

The hierarchy of space from site entrance to the school building, private recreational areas, access to all weather surfaces and the grass fields beyond is logical and manageable. The external landscape will integrate the new building and refurbished sports hall into the wider school environment.





4.4.3.4 External provision

As stated previously, the overall site is 120,566m² which exceeds BB103 which specifies a minimum guideline site area of 45,000m² based on a pupil number-on-roll of 720.

The existing Playing Field Area as defined by Sport England is 70,799m², therefore the site is well-provided (compared to a BB103 guideline figure of 31,200m²). If there is an overall loss of playing field area, it should be possible to meet one of the Sport England exceptions.

This option proposes:

Sports Provision



The area to the south will remain and be divided between all-weather and natural sports pitch provision which could accommodate, as an example:

Grass pitch provision

- 3 no full-size football pitches
- 2 no reduced-size football pitches
- 1 no cricket fields

Other field sports could be supported including rugby. Different permutations and combinations of pitch sizes and quantities are possible depending on seasonal change and curriculum requirements.

Other green space to support Athletics including

- Long and triple jump
- Rounders (juniors)
- Potential to mark out a 400m grass running track in the summer

All weather provision

- New full-size artificial turf pitch
- New or refurbished four-tennis court MUGA
- 400m all-weather running track and associated facilities refurbished

Vehicular movement

- A new car park, coach and drop off using the existing vehicular access

Social Provision

- Extended and better organised informal hard and soft play areas and external dining.
- Habitat areas will be integrated into the proposals by enhancing existing boundary planting and other areas not used for sport or informal play.

4.4.4 Option 4 Existing site, New Teaching Block and Sports Hall

This option develops a single building option with an integrated sports hall, built to the south of the existing school on the space currently occupied by the existing tennis courts enabling on completion the integration of the car park and the bus drop off area for staff and student parking complemented by the provision of new visitor parking and coach drop off. This exploits the virtues of the site and fits the required accommodation into a two-storey C shaped building aligning to the advice provided by the planning department. This will enable the school to remain in operation during construction. There will need to



be a period in the programme for the demolition of the existing school and sports hall and site remodelled.

4.4.4.1 Site Arrangement

The developed solution sits quite far back in the site and will have very little presence to Acklington Road. The principle block runs east west with two wings running north south that create a sheltered space for pupils to safely arrive and congregate prior to entering the building at the beginning of the school day.

The courtyard space would be south facing, creating the opportunity to have external dining as well as social spaces and sheltered outdoor learning to be enjoyed throughout the day. As the school role is not large this space will act efficiently and be easy to supervise, a situation not enjoyed in the current facilities.

With vertical circulation cores at the ends of the wings pupils will be provided with unambiguous access and egress between lessons, breaks and at the beginning and end of the school day.

The northern block houses all the large format spaces, including, sixth form social, kitchen, dining hall, performance, music LRC, T Level Catering and incoming plant with science above. The western most wing houses Food and Design Technology with Art, ICT and Vocational Studies on the first floor. The wing to the west houses, English, Humanities and Maths

The Sports block sits at the end of the eastern wing with easy access to the sports provision beyond.

The hierarchy of space from site entrance to the school building, private recreational areas, access to all weather surfaces and the grass fields beyond is logical and manageable. The external landscape will integrate the new building into the wider school environment.



4.4.4.2 External Provision

As stated previously, the overall site is 120,566m² which exceeds BB103 which specifies a minimum guideline site area of 45,000m² based on a pupil number-on-roll of 720.

The existing Playing Field Area as defined by Sport England is 70,799m², therefore the site is well-provided (compared to a BB103 guideline figure of 31,200m². If there is an overall loss of playing field area, it may not be possible to meet one of the Sport England exceptions as the new building would occupy land which is currently playing field, and this is unlikely to be able to be replaced with an equivalent level of provision elsewhere on the site. This could lead to a Sport England objection.

This option proposes:

Sports Provision



The area to the south will remain and be divided between all-weather and natural sports pitch provision which could accommodate, as an example:

Grass pitch provision

- 3 no full-size football pitches
- 2 no reduced-size football pitches
- 1 no cricket fields

Other field sports could be supported including rugby. Different permutations and combinations of pitch sizes and quantities are possible depending on seasonal change and curriculum requirements.

Other green space to support Athletics including

- Long and triple jump
- Rounders (juniors)
- Potential to mark out a 400m grass running track in the summer

All weather provision

- New full-size artificial turf pitch
- New four-tennis court MUGA
- 400m all-weather running track and associated facilities refurbished

Vehicular movement

- A new visitor car park, coach and drop off using the existing vehicular access
- The retention and remodelling of the existing coach drop off and car park provision

Social Provision

- Extended and better organised informal hard and soft play areas and external dining.

Habitat areas will be integrated into the proposals by enhancing existing boundary planting and other areas not used for sport or informal play.

4.4.5 Option 5 New Build on Land to the East of the Recreation Ground

The new site is referred to as land to the east of the recreation ground for the purpose of this report. The option developed follows a similar model as deployed for Option 4. The site is capable of meeting the BB103 requirements when integrated with the green open space of the existing site.

This option enables the building and sports hall and all external sports provision to be delivered in one phase, leaving the existing school fully operational on its existing site during the construction works.



4.4.5.1 Site Arrangement

The proposal develops a site masterplan that best serves the requirements for curriculum delivery and provides a well organised, effective design response.

The proposed new site is a school field that sits between the current JCSC middle school and recreation ground on Acklington Road. It would be integrated with a proportion of the existing site to create a new provision. This site has very similar characteristics to the existing site.

There are less space pressures when compared with the redevelopment of the existing site. We have demonstrated that a three superblock and courtyard typology would fit on the site comfortably. These options would however be subject to more scrutiny by the planning authority in regard to their impact. A two-storey design sits more comfortably with the scale of surrounding domestic developments to the north of Acklington Road.

The optimal solution would be a two-storey courtyard design that provides appropriate frontage to Acklington Road running east west, two wings run north south that create a sheltered space for pupils, creating a safe arrival and congregation space prior to entering the building at the beginning of the school day. The courtyard space would be south facing creating the opportunity to have external dining as well as social spaces and sheltered outdoor learning to be enjoyed throughout the day. As the school role is not large, this space will act efficiently and be easy to supervise, a situation not enjoyed in the current facilities.

With vertical circulation cores at the ends of the wings and along the southern face of the northern block, pupils will be provided with unambiguous access and egress between lessons, breaks and at the beginning and end of the school day.

This option requires the provision of a new vehicular junction off Acklington Road for visitor and accessible parking. The existing school parking area will be retained and reconfigured as necessary, providing all the staff and coach drop off requirements. There are very good safe foot path links across the top of the recreation ground that would link the parking provision to the new site. This route would need to be properly lit for staff and pupil safety.

The building orientation locates the large format spaces facing Acklington Road which by virtue will function as a noise buffer between this block and the oasis/courtyard sitting to the south. The building form wraps around hard play and landscaped areas.

The northern block houses all the large format spaces, including, sixth form social, kitchen, dining hall, performance, music LRC, T Level Catering and incoming plant with Science above. The western most wing houses Food and Design Technology with Art, ICT and Vocational Studies on the first floor. The wing to the west houses, English, Humanities and Maths

The indoor sports facilities and associated changing are linked to the western most wing in close proximity to all weather and grass sports provision, supporting curriculum delivery.



The secure line is easy to achieve enabling the site to be secured out of hours, supporting community access without compromising school security.

The site is large enough to support future expansion.

The hierarchy of space from site entrance to the school building, private recreational areas, access to all weather surfaces and the grass fields beyond is logical and manageable.



4.4.5.2 External Provision



As stated previously, the overall site is approximately 133,000m² which exceeds BB103 which specifies a minimum guideline site area of 45,000m² based on a pupil number-on-roll of 720.

The existing Playing Field Area as defined by Sport England is 82,324m², therefore the site is well-provided (compared to a BB103 guideline figure of 31,200m²). It should be possible to provide an equivalent area of playing field (compared to that lost on the site east of the recreation ground) once the existing buildings are demolished.

This option proposes:

Sports Provision

The existing playing field area to the south will remain and be divided between all-weather and natural sports pitch provision which could accommodate, as an example:

New all-weather provision

- Full-size artificial turf pitch
- A four-tennis court MUGA

Grass pitch provision

- 1 no full-size football pitch (inside the existing all-weather athletics track)
- 4 no full-size football pitches
- 2 no reduced-size football pitch

Other green space to support Athletics including

- Long and triple jump
- Rounders (juniors)

Vehicular movement

- New vehicular access, and on-site visitor and accessible car park provision
- Upgraded staff and coach and drop off on the existing site using the existing vehicular access

Social Provision

- Informal hard and soft play areas and external dining.
- Habitat areas will be integrated into the proposals by enhancing existing boundary planting and identifying other areas not required for sport or play provision.

4.4.6 Option 6 New Build on the Recreation Ground

The new site is referred to as the recreation ground for the purpose of this report. The option developed follows a similar model as deployed for the existing site. The site is capable of meeting the BB103 requirements.



This option enables the building and sports hall and all external sports provision to be delivered in one phase, leaving the existing school fully operational on its existing site during the construction works.

4.4.6.1 Site Arrangement

The proposal develops a site masterplan that best serves the requirements for curriculum delivery and provides a well organised, effective design response.

The proposed new site is a recreation ground that sits between the current JCSC high school and middle school on Acklington Road. It would be integrated with a proportion of the existing site to create the new provision. This site has very similar characteristics to the existing site. It is part occupied by all-weather recreation and play areas, including a skate park which would all need re-providing if this proposal were adopted.

There are less space pressures on this site when compared with the redevelopment of the existing site. We have demonstrated that a superblock and three storey courtyard typology would fit on the site comfortably. These options would be subject to more scrutiny by the planning authority in regard to their impact. A two-storey design sits more comfortably with the scale of surrounding domestic developments to the north of Acklington Road and the stand-alone adjacent property to the west.

The optimal solution would be a two-storey courtyard design that provides appropriate frontage to Acklington Road running east west, two wings run north south that create a sheltered space for pupils, creating a safe arrival and congregation space prior to entering the building at the beginning of the school day. The courtyard space would be south facing creating the opportunity to have external dining as well as social spaces and sheltered outdoor learning to be enjoyed throughout the day. As the school role is not large, this space will act efficiently and be easy to supervise, a situation not enjoyed in the current facilities.

With vertical circulation cores at the ends of the wings and along the southern face of the northern block, pupils will be provided with unambiguous access and egress between lessons, breaks and at the beginning and end of the school day.

This option takes advantage of the established vehicular bell mouth at the eastern corner of the site which will lead to onsite visitor and accessible parking provision. The existing school parking area will be retained and reconfigured as necessary providing all the staff and coach drop off requirements. There is a very good safe foot path link to this site from the existing school. This route would need to be properly lit for staff and pupil safety.

The building orientation locates the large format spaces facing Acklington Road which by virtue will function as a noise buffer between this block and the oasis/courtyard sitting to the south. The building form wraps around hard play and landscaped areas.

The northern block houses all the large format spaces, including, sixth form social, kitchen, dining hall, performance, music LRC, T Level Catering and incoming plant with science above. The western most wing houses Food and Design Technology with Art,

ICT and Vocational Studies on the first floor. The wing to the west houses, English, Humanities and Maths

The indoor sports facilities and associated changing are linked to the western most wing, in close proximity to all weather and grass sports provision, supporting curriculum delivery

The secure line is easy to achieve enabling the site to be secured out of hours supporting community access without compromising school security.

The site is large enough to support future expansion.

The hierarchy of space from site entrance to the school building, private recreational areas, access to all weather surfaces and the grass fields beyond is logical and manageable.

4.4.6.2 External Provision

As stated previously, the overall site is 76,826m² which exceeds BB103 which specifies a minimum guideline site area of 45,000m² based on a pupil number-on-roll of 720.

The existing Playing Field Area as defined by Sport England is 43,841m².

This option proposes:

Sports Provision

The area to the south will remain and be divided between all-weather and natural sports pitch provision which could accommodate, as an example:

New all-weather provision

- Full-size artificial turf pitch
- A four-tennis court MUGA

Grass pitch provision

- 1 no full-size football pitch (inside the existing all-weather athletics track)
- 1 no reduced-size football pitch

Other green space to support Athletics including

- Long and triple jump
- Rounders (juniors)

Vehicular movement

- New vehicular access, and on-site visitor and accessible car park provision,
- Upgraded staff and coach drop off on the existing site using the existing vehicular access

Social Provision



- Informal hard and soft play areas and external dining.
- Habitat areas will be integrated into the proposals by enhancing existing boundary planting and identifying other areas not required for sport or play provision.

4.5 Massing and Identity

We have been advised by the planning department that all proposals should if feasible be limited to two storeys to respect the scale of the neighbouring sites. This does cause some proximity issues on the redevelopment of the existing site which may need to have some three storey elements.

4.6 SEN Accessibility

The new development will provide full accessibility and as such can be Equality Act compliant, compliant with BS8300 and the relevant building regulations. This scheme does not present any onerous design challenges as both sites are flat and can be remodelled, without much, if any, material being taken off site in consequence.

The feasibility study proposes the allowance of two new lifts within the school buildings and a lift within the sports hall area to ensure compliance particularly out of hours. External level access will be achievable to all sports facilities and full accessibility to the visitors' entrance is achievable for both options via an accessible visitors parking area.

The teaching facilities are enhanced by the inclusion of a dedicated SEN facility

4.7 Towards Carbon Neutral

NCC's approach to carbon reduction is set out in its draft Climate Commitment Action Plan 2021. The target date of net zero emissions for the county is 2030. The target date to halve operational emissions has been brought forward from 2030 to 2025 and an updated action plan with a road map to achieving net zero emissions by 2030 will be published by 2024. To support this ambition, we have reviewed the impact of these considerations for this project.

The adopted approach is to achieve net zero carbon in use which will be achieved by a balance of improvement in the overall thermal performance of the building envelope, reducing energy demands and the provision of energy from renewable sources on site (or off site from responsible sources) and develop offset strategies such as planting coppices on the site all with the aim of creating a Net Zero Carbon proposal. We have provided a summary of the potential cost impacts of these options and tabulated them below. The initial investment is substantial however the long-term benefits for running costs are significant and it enables Northumberland County Council to lead the way.

The impact of these considerations is still at a high level and will be developed in more detail during the design development and will be reported against at every stage. This approach will, we believe, assist in the planning approval processes for either site.

If budgetary pressures persist as anticipated aspects of delivering this strategy may be deferred, this will not impact the design but enable technologies to be added at later date to achieve the desired outcomes.

4.8 Third party Use

Currently the local first and middle schools and the community enjoy access to the sports hall during the school day as well as at the evening and weekends.

Consultation with all third-party users has taken place and will continue throughout the design and construction phases of the project should this OBC be approved.

4.9 Health and Safety

The design requires consideration to the potential implications of the Workplace (Health, Safety and Welfare) Regulations 1992, the Construction Design and Management (CDM) Regulations 2015 and all other construction related health and safety legislation. At this stage, the considerations have been at a very high level and will be developed once the designs are developed further.

The phasing of the works is critical to the safety of the existing school users and public visiting the site. This needs to consider how the design and temporary work impacts the existing school and the additional control measures required throughout the construction period to minimise conflict between the school and the construction activities.

The current strategy is to build the new building, vacate the existing estate, demolish the existing estate, and complete the external sports provision. To achieve this, it is recognised that the school sports curriculum will need to be temporarily delivered off site. Temporary car parking arrangements on the adjacent site might need to be provided, after decanting into the new building.

The existing estate varies in age and as such will need to be carefully managed during the demolition phase and the following will need to be considered and comprehensive mitigation strategies developed: -

- There is asbestos present in several of the structures
- There are likely to be some structural issues due to the age of the building

- Effective vehicle and pedestrian segregation will need to be fully planned and evaluated
- There will be some tree removal and tree protection required for the development of the existing site.
- Ecological issues
- Impacts from traffic (buses / drop offs) congestion at peak times

The proposed demolitions will expose the construction workforce, third parties and the public to other foreseeable hazards including: -

- Dust
- Noise
- Vibration
- Lead
- Utility Services
- The Workplace (Health, Safety and Welfare) Regulations 1992 will apply (but will not apply during the construction phase, for which CDM 2015 contains provisions).

In relation to the proposed new building the impact of the design must consider: -

- Priority to permanent, collective edge protection
- Access/equipment/activities associated with cleaning and maintaining the Structures
- Information pertaining to any proprietary system to access roofs/voids
- Anti-social behaviour/crime prevention
- Lighting
- Climbing hazards
- Flooding / drainage
- Biological hazards - including Leptospirosis/Weil's Disease, Lyme disease etc.

The extent of works required to develop the preferred design will require the appointment of CDM duty holders with sufficient skills, knowledge, experience, and training to fulfil their respective roles.

The appointed Principal Designer must ensure the general principles of prevention are applied to the design and hazards are reduced to an acceptable level. Information relating to residual hazards must be passed to the Principal Contractor for inclusion into the Construction Phase Plan and Health and Safety file.

4.10 Material Choices

In response to the Grenfell Tower fire, HM Government have issued amendments to Approved Document B: Fire Safety Volume 2 – Buildings Other Than Dwelling Houses,



2006 edition incorporating 2007, 2010 and 2013 amendments. These amendments took effect on 21 December 2018 for use in England for all applications made after this date.

We are bound by these amendments to façade design which, along with the guidance laid out in Approved Document B, provide rules on fire egress for all new building types, building heights, firefighting requirements and when sprinklers are / not required.

During the course of the design process, we will bring to your attention the strategies and the material choices available to you to achieve compliance with Approved Document B. Some material choices may comply with building regulations but may be uninsurable on the basis of fire safety. NCC need to consider these implications and may wish to improve on the legislative standards to comply with your own governance and insurance requirements.

Our recommendation at this stage is to elect for the inclusion of non-combustible materials for all wall build-ups. This will require all insulants to be mineral wool. This does impact on material costs. We will ensure all other options are explored and the financial implications explained, and the risks associated with decisions we collectively make.

We recommend the appointment of a fire engineer on most projects. The criteria for when an engineer is employed depends on project complexity and where a standard response to Approved Document B does not apply. Multi occupancy residential developments, schools, hospitals, and offices will warrant the involvement of a fire engineer to ensure there is a comprehensive fire risk assessment and that the façade design satisfies BR135.

4.11 Planning Statement

Planning Application

It is proposed that a full planning application will be submitted for the construction of the new school building and sports facilities with associated access, parking and landscaping for the preferred development option on Acklington Road

The planning application is categorised as a major planning application. Major planning applications typically have a 13-week determination period however changes to the determination period for 'public service infrastructure' projects, which includes schools were introduced in 2021 in The Town and Country Planning (Development Management Procedure and Section 62A Applications) (England) (Amendment) Order 2021. The changes reduced the current 21-day statutory consultation period to 18 days and the determination period has been reduced from 13 weeks to 10 weeks.

Given the nature of project, the application would be required to be determined at the Council's Strategic Planning Committee.



The planning application will need to be supported by a suite of plans and documents to demonstrate that the application is policy compliant. This is discussed in more detail in the below sections.

Planning Context

The key planning policies relevant to the scheme are set out in the statutory development plan which, in this case, comprises of the Northumberland Local Plan 2016 and the National Planning Policy Framework ('NPPF').

Northumberland Local Plan 2016

The Development Plan for the Site is the Northumberland Local Plan (the 'NLP') 2016 to 2023 was formally adopted by Northumberland Council on 31 March 2022. The Northumberland Local Plan now forms part of the development plan for Northumberland alongside the 'made' Neighbourhood Plans. It replaces the Development Plan Documents prepared by the former districts, boroughs and county councils prior to Local Government Review in 2009.

The following policies are relevant to the proposed development:

- Policy STP1 – Spatial strategy
- Policy STP2 – Presumption in favour of sustainable development
- Policy STP3 – Principles of sustainable development
- Policy STP4 – Climate change mitigation and adaption
- Policy STP5 – Health and wellbeing
- Policy STP7 – Strategic approach to the Green Belt
- Policy STP8 – Development in the Green Belt
- Policy HOU4 – Housing development site allocations
- Policy QOP1 – Design principles
- Policy QOP2 – Good design and amenity
- Policy QOP4 – Landscaping and trees
- Policy QOP5 – Sustainable design and construction
- Policy TRA1 – Promoting sustainable connection
- Policy TRA2 – The effects of development on the transport network
- Policy TRA4 – Parking provision in new development
- Policy ENV1 – Approaches to assessing the impact of development on the natural, historical and built environment
- Policy ENV2 – Biodiversity and geodiversity
- Policy ENV3 – Landscape
- Policy ENV7 – Historic environment and heritage assets
- Policy ENV9 – Conservation areas
- Policy WAT2 – Water supply and sewerage
- Policy WAT3 – Flooding
- Policy INF2 – Community services and facilities



- Policy INF5 – Open space and facilities for sport and recreation
- Policy POL1 – Unstable and contaminated land
- Policy MIN4 – Safeguarding mineral resources

National Planning Policy Framework (NPPF)

The National Planning Policy Framework (the 'NPPF') was published in July 2021 and sets out the government's requirements and objectives for the planning system in England, in order to ensure that decision making is positive, sustainable and provides for necessary development in the right areas.

The following sections of the NPPF are relevant to the proposed development:

- Section 2 – Achieving sustainable development
- Section 4 – Decision-making
- Section 8 – Promoting healthy and safe communities
- Section 9 – Promoting sustainable transport
- Section 11 – Making effective use of land
- Section 12 – Achieving well designed places
- Section 14 – Meeting the challenge of climate change, flooding and coastal change
- Section 15 – Conserving and enhancing the natural environment
- Section 16 – Conserving and enhancing the historical environment

Planning Matters

Discussions have taken place with the LPA and statutory consultees in relation to the proposed development and key planning matters. Based on the proposed development options and relevant planning policy, we have an understanding of the policy position and the key planning matters. Those we believe relevant to the determination of the application are set out below which will be addressed as part of the planning application.

Need for the development

The need for new schools is vital and is evident in planning policy at all levels seeking to provide replacement or new educational facilities to meet the needs of an expanding population.

The need to provide enhanced educational facilities, whether this is done via replacement or new educational facilities to meet the needs of the local community, is recognised and promoted in paragraph 95 of the NPPF. This is reiterated within the policy statement regarding Planning for Schools Development (2001), stating that the planning system should operate in a positive manner when dealing with proposals for the creation of state-funded schools.

At a local level, educational facilities are supported by Core Strategy Policy C1, Saved Policy C10 and Emerging Policy STP5 and INF2.



Based on the above, it is considered that the principle, of a new school development, is supported in policy terms at both a national and local level.

Other Matters

As part of the planning application, we will submit technical reports to address matters relating to:

- Archaeology
- Ecology
- Flood Risk and Drainage
- Land Contamination
- Lighting
- Noise
- Transport

The reports mentioned above will need to demonstrate that there will be no adverse impacts because of the proposed development, or that any impacts can be satisfactorily mitigated in order to justify that the proposed development is acceptable and policy compliant.

Validation Requirements

It is considered that the following information would be required for validation of a planning application however, this list will be agreed with the LPA in advance of submission

- Application forms and ownership certificates
- Application fee
- Plans pack to include: Location plan, Site plan, Proposed Elevations, Proposed Floorplans, Proposed Roof Plans, Proposed Site Sections and Levels
- Design and Access Statement
- Desk-Based Archaeological Assessment
- Ecological Surveys and Assessments
- Flood Risk, Surface Water and Drainage Assessment
- Heritage Impact Assessment
- Land Contamination Assessment and Minerals Safeguarding Assessment
- Landscaping Details
- Landscape Visual Impact Assessment
- Lighting Assessment
- Noise Assessment
- Open Space Assessment
- Planning Statement
- Statement of Community Involvement
- Transport Assessment, Travel Plan and Road Safety Audit
- Tree Survey/Arboriculture Impact Assessment



A letter of comfort from NCC planners has been received confirming they would look to support the application. Reference has been made to identify the key planning considerations, which are all matters we would seek to address as part of the planning application. A copy can be found in Appendix 4J.

4.12 Summary

The studies that form the Outline Business Case (OBC) have considered the educational brief, planning, highways, and Sport England requirements. In addition, all of the surveys referenced in this OBC have been taken into consideration as have all design guidance and standards that are relevant to this initial stage of design.

The whole sale refurbishment and upgrade of the existing estate is feasible but would be lengthy and disruptive and due to the constraints associated with the existing building would still, when complete have inherent issues in terms of space standards and circulation deficiencies.

The redevelopment of the existing site with new buildings has significant compromise, mostly due to the need to build away from the existing buildings to mitigate disruption and ensure continuity of curriculum delivery. Neither option uses the site to best effect, and will have long disruptive phased programmes. The construction access is complex.

The development of the recreation ground site would be a good option if it were not for the complexities/risks associated with ownership and covenants, which if not easily navigated put undue risk onto the proposal along with the need to replace the recreation facilities

A new build option on land to the east of the recreation ground is the most advantageous option. The site can be developed without any disruption to the continuity of education delivery and there are no legal complications in regard to site ownership.



The following documents are attached at Appendix 4:	
4A	Education Brief
4B	Site Investigation - Desktop Study
4C	Ecology Appraisal and Bat Survey
4D	Arboricultural Survey
4E	Topographical Survey
4F	Utilities Survey
4G	FF&E including technology audit report
4H	IT Audit
4I	Schedule of spaces that remain undersized
4J	Letter of Comfort from NCC Planners



5 COMMERCIAL APPRAISAL

Section 5 of this OBC describes the commercial appraisal for the options available for the scheme.

5.1 Introduction

This section for the Outline Business Case examines and sets out the current position with regards to the commercial viability of the scheme.

Northumberland County Council ("NCC") along with its Technical Advisor has undertaken a feasibility cost assessment of the scheme, based on the options outlined earlier in section 3.3 of this report.

5.2 Funding

The scheme is to be fully funded by NCC.

There is potential for Sport England and/or Football Foundation funding or funding via other national governing bodies of sport, but this has not been included in any figures reported herein.

Other grants or funding streams may be available, but at the time of writing these have not been pursued. The reason for this is that NCC wishes to remain in full control of the scheme design and requirements by reducing the input of external factors which would otherwise have an impact on the scheme and programme.

5.3 Project Assumptions

Assumptions have been used in calculating the scheme costs and are identified as follows:

- New school to operate from September 2025 (assuming New Build)
- Gross Internal Floor Area for the New Build is based on 6,359m².
- Design & build procurement route.
- Works to be carried out during normal working hours.
- Works to be completed in two phases for the new build options on the existing site with further multiple phases for the refurbishment and extension options.
- Complete segregation between construction works and a live operational school site.
- Temporary accommodation will be required for the refurbishment and extension option and phasing will add a further year to the delivery programme.

The following exclusions also apply:

- VAT
- Capital allowances
- Third party grant or funding, other than those mentioned above



- Land acquisition costs
- Maintenance costs
- Finance and legal costs

The Schedule of Accommodation areas and pupil numbers are the key driver for the funding for construction costs. These have in turn assisted with the generation of the design options on which the cost information has been prepared. The following figures have been used for projected pupil numbers:

Table 5a: Projected Pupil Numbers

School Site	Total Proposed Numbers
James Calvert Spence	720

5.4 Overall Project Outturn Costs

NCC and its Technical Advisor have developed costs for each of the options to demonstrate the scheme's affordability. Build cost rates used have been taken from the Building Cost Information Service (BCIS), in-house cost data and by benchmarking against other recently completed schemes of a similar size and nature.

The table below provides a cost comparison of the overall Scheme Options to achieve Northumberland County Council's Facility Output Specification (FOS) together with a minimum EPC A rating:

Table 5b: Overall Scheme Options

Overall Scheme Options Cost		
Ref	Option	Total
1	Do Minimum	£18,361,881
2	Refurbishment and Extension (Existing Site)	£25,895,271
3	New Build on Existing Site (Retain and Refurbish Sports Block)	£24,803,745
4	New Build on Existing Site	£23,523,198
5	New Build on Land East of Recreation Ground	£23,390,602

5.4.1 Construction Cost including inflation

Over the last few years, inflation has soared to abnormally high levels putting tremendous strain on construction costs.

During 2020, BCIS was rather stagnant and reflected the market up until the 4th Quarter, showing a modest rise in inflation and in some cases, deflation. At which point, some Contractors began to see a major shift in the market, moving circa 5-10% since Feb 2021



to the end of September 2021. This remained constant throughout the rest of 2021 and has extended into 2022 rising even further.

Contractors have seen a lot of volatility in the market, certainly over the last 6 months, with surging inflation making it very difficult to pitch where they tender. As a result, Contractors have been reviewing the tenders, prior to submitting to clients, on a package-by-package basis, with steel packages being particularly problematic. Tenders are typically held as fixed price for 90 days, but packages such as steel are staying fixed for only 24 hours in some cases.

Some examples of material price increases over the past 6-12 months, include 13% increases for plasterboard, raw materials up as much as 80% and bricks and blocks by up to 10%. These are just a few examples but there are many more which have been affected.

Fuelled by the buoyant economy in 2021 and with the continuing escalation in materials and energy costs, Contractors and suppliers have been unable to absorb cost increases and the marketplace has allowed for the transferring of costs on, affecting tender prices.

Whilst inflationary allowances have been included, the construction industry is seeing unprecedented fragmented global supply chains as a result of Brexit, COVID-19 and most recently, due to the crisis in Ukraine. As a result of this, it can be identified that the current market conditions are listed as Overheating. Therefore, it would be beneficial to undertake early Contractor engagement to discuss current market conditions and tender appetite as soon as practicably possible. Costs are still very volatile in the market at present and whilst best endeavours have been made to account for rising inflation, this will need to be carefully monitored during the next stage.

Note that inflation has been included in the figures above within Table 5b.

5.4.2 Abnormal Costs

During the development of the options, surveys and investigations have been undertaken and their results considered. The resultant abnormal costs identified have been estimated and are summarised in table 5d.

Table 5d: Abnormal Cost

Category	Option 1 (‘000)	Option 2 (‘000)	Option 3 (‘000)	Option 4 (‘000)	Option 5 (‘000)
Total	5,619	8,589	7,375	6,784	6,684



The abnormal costs have been collated, in part, from the preliminary results of the various surveys which have been carried out as part of the OBC process and include allowances for:

- Further detailed ecological surveys to be carried out during the next stage.
- Off-site highways works that will be required to adapt the highway to cater for the new/existing vehicular and pedestrian access routes and junctions depending on which option is chosen.
- Enhancing foundation solutions for unforeseen or unfavourable ground conditions.
- Any arboricultural works and measures required to protect existing trees.
- Drainage solutions such as sustainable urban drainage systems (SUDS), attenuation tanks, ponds, soakaways and the like.
- New gas, electricity and water supplies to the sites, together with the removal of any existing redundant services.
- Temporary accommodation for existing students for options where work is being undertaken to the existing school. This will include a phased approach to ensure the school remains operational.
- Potential diversions and grouting to coal seams - further detailed investigations will be required at the next stage to confirm adequacy of the allowances.
- Provision of a temporary haul road for construction access during the works.

5.4.3 ICT and FF&E

An allowance for end-user ICT equipment and loose FF&E have been included based on the proposed pupil numbers for the new school, although the strategy would be to use existing items with the funding allowance used where it isn't economically viable to relocate items to a new building.

5.4.4 Fees

Design team fees have been included in the costs above. There will be fees paid for by the Council up to the point of novation, after which the remainder of the design team fees will be paid for by the Contractor. This only applies to the new build options.

5.5 Sustainability

5.5.1 Net Zero Carbon in Operation Approach

Net Zero Carbon in Operation is achieved when the amount of carbon emissions, associated with a building's operational energy on an annual basis, is zero or negative. This type of building is highly efficient and powered from on site and / or off-site renewable energy sources, with any remaining carbon balance offset.

Examples of how this could be achieved on this development include, but not limited to:

- Maximise building orientation particularly the noise source from the main road.
- Prioritise passive measures, natural ventilation, daylight and beneficial solar glare in winter months
- Minimise the requirement for power usage in long term maintenance.

Based on the available cost data, which is limited due to the lack of completed similar buildings, designing and building to this standard will increase the costs, included in Table 5b, by a further 18%. Market research was undertaken with experienced industry professionals who confirmed the required uplift as being adequate for this type of work. This also mirrors cost data from recent schemes currently being carried out in the North East which are also aiming to achieve Net Zero Carbon in Operation through the DfE delivery approach.

As a result, this would likely **increase the capital budget by between £2.3m and £7.8m**, depending on which option is chosen, over and above the costs required to achieve an NCC FOS (EPC A) rated building.

5.5.2 Other Sustainability Options

Other sustainability options were explored such as Passivhaus and Net Zero Carbon in Construction and in Operation (Embodied Carbon). The reasons for not proceeding with these other options are as follows:

Passivhaus adopts a whole-building approach with clear, measured targets, focused on high-quality construction, certified through an exacting quality assurance process. The prescriptive nature of the build can cause limitations on school operations and flexibility meaning there could be some potential restrictions on room type and adjacency requirements. It is also restrictive in relation to future expansion plans.

Passivhaus standard is a route towards Net Zero Carbon however further works would be required to achieve the Zero Carbon aspiration of the Council. The Department for Education have also decided to move away from Passivhaus designs now in favour of Net Zero Carbon in Operation in their latest 'Spec 21' technical annex'.

Net Zero Carbon in Construction and in Operation includes any CO₂ created during the manufacturing of building materials (material extraction, transport to manufacturer, manufacturing), the transport of those materials to the job site, and the construction practices used. Put simply, embodied carbon is the carbon footprint of a building or infrastructure project before it becomes operational. Most of the embodied carbon for a construction product is CO₂ emitted from the use of fossil fuels in extraction and manufacturing of construction materials and because of process emissions from manufacturing. To address embodied carbon, several organizations including Architecture 2030, Structural Engineers 2050 Challenge (SE2050), the Carbon Leadership Forum, and the World Green Building Council have jointly taken on a mission to eliminate embodied carbon from buildings by the year 2050.

How we tackle embodied carbon is going to change the whole method of materials are produced in manufacture and at source. This step change is yet to be fully implemented across all different processes of manufacturing and construction. We therefore do not believe that this approach or the cost of implementing such is yet fully understood or available within the construction sector at this time which is supported by soft market testing undertaken with several principal contractors.

5.5.3 Overall Project Outturn Costs

If the Council opted to proceed with any of the options identified previously, including the requirement to achieve Net Zero Carbon in Operation, the summarised costings for each option would be as follows:

Option	FOS (EPC A)	Net Zero Carbon in Operation	Total
1	£18,361,881	n/a	£18,361,881
2	£25,895,271	£7,791,997	£33,687,268
3	£24,803,745	£2,400,036	£27,203,781
4	£23,523,198	£2,335,398	£25,858,596
5	£23,390,602	£2,335,398	£25,726,000

5.6 Summary

The Overall Project Outturn Cost for the recommended option (Option 5 - New Build on Land East of Recreation Ground) is £25,726,000.

This is exclusive of VAT however includes abnormals, professional fees, ICT, FF&E and the additional funding of £2,335,398 to support the further recommendation to achieve Net Zero Carbon in Operation.

6 READINESS TO DELIVER

6.1 Project Governance

The NCC process for project structure and governance has been established to oversee and manage the relevant stages of this initiative. A Project Board, Project Steering Group and Project Team have been established, although membership of either group may be subject to variation according to the requirements of the project should it move forwards to implementation. Membership of the Project Board is shown in Table 6A: and is an existing group that oversees the delivery and development of major education projects.

Table 6A: Project Board Membership

Major Capital Project Board Membership		
Name	Post	Role
Audrey Kingham	Executive Director of Adults and Children Services.	Chair
Rob Murfin	Executive Director Planning and Economy	Member
Rick O'Farell	Chief Executive	Member
Sue Aviston	Head of School Organisation and Resources	Member
Alison Elsdon	Service Director Finance	Member
David Laux	Head of Technical Services	Member
Mike Turner	Head of Property Services	Member
Lawrence Inkster	Director, Faithful & Gould (Technical Advisors for the project)	Member
Mike Robbins	Strategic Estates Manager	Member
Alistair Bennet	Senior Accountant	Member
Pam Hindhaugh	Procurement	Member
Phil Soderquest	Health and Safety	Member

Table 6B: Project Steering Group

Steering Group Membership		
Name	Post	Role
Cllr Guy Renner Thompson	Cabinet Members for Children's Services	Chair
Cllr Jeffrey Watson	Councillor for Amble West with Warkworth ED, representing Conservative	Member
Cllr Terry Clark	Councillor for Amble ED, representing Labour	Member
Cllr Trevor Thorne	Councillor for Shilbottle ED (Split) Alnwick/Morpeth, representing Conservative	Member
Cllr Scott Dickinson	Councillor for Druridge Bay ED (Split) Ashington, representing Labour	Member
Audrey Kingham	Senior Service Director of Education and Skills	Member
Sue Aviston	Head of School Organisation and Resources	Member
Mark Elliott	Education Capital Programme Manager	Member



Neil Rodgers	Headteacher for James Calvert Spence College	Member
Lawrence Inkster	Director, Faithful & Gould (Technical Advisors for the project)	Member

The Project Steering Group, outlined in Table 6B, is a consultative group between the school and the LA. The group will represent the local area and will ensure the local views are taken into account through the development and delivery of the project.

6.1.1 Project Management

A project team has been assembled to produce this OBC for review and decision by NCC's Cabinet. If the scheme is approved to move forward, the suitability of the current project team would be reviewed, and relevant adjustments made to personnel where required to ensure successful delivery.

From consultation to implementation, the project team (outlined in Table 6C) has a breadth of knowledge and experience of successfully delivering significant school capital projects, in Northumberland.

As it is proposed for the project to be procured through a design and build process it is recommended that the current team are retained to develop detailed designs in order to tender the project on the open market to ensure best value and control the quality of the design.



Table 6C: Project Team

Project Team		
Role on Project	Position	Name
Project Sponsor	Executive Director of Adults & Children's Social Care and Education	Audrey Kingham
Project Director	Head of School Organisation and Resources.	Sue Aviston
Project Manager	Capital Programme Manager	Mark Elliott
Project Assistance	Project Support Officer	Ross Downey
Project Assistance	Degree Apprentice Project Support Officer	Robyn Marley
James Calvert Spence College Representative	Headteacher	Neil Rodgers
Communications	Media Communications Officer	Liz Walker
Land issues and investigations	Strategic Estates Manager	Mike Robbins
Legal Adviser	Legal Adviser	Womble Bond Dickinson
Technical Adviser	Cost management, design and technical services.	Faithful+Gould

Resources have been commissioned to undertake the site options appraisal, to determine affordability and feasibility and to collate the OBC. These appointments were made via NCC's framework contract with Faithful+Gould.

6.2 Consultation and Statutory Approvals

All of the applicable statutory requirements to consult on the proposal to reduce the age range of JCSC were complied with in accordance with Section 19 (1)) of the Education and Inspections Act 2006 during a pre-publication consultation period that took place during the following dates:

- 11 May to 29 June 2022



Consultees recommended in the relevant statutory guidance were consulted via a Consultation Document that was made widely available on the Council's website. Consultees included parents, staff, pupils, Governors of the impacted schools in the Coquet Partnership, local parish councils, the Church of England and Roman Catholic dioceses, early-years providers, the local MP, staff representatives (unions), and relevant neighbouring schools in other Northumberland Partnerships. A public consultation event was also held in Amble Masonic Hall on 11 June 2022. Individual meetings with staff and the Governing Bodies of schools that were proposed for change also took place during the consultation period, and a meeting was also held with the Governing Body of NCEA Warkworth Primary Academy, which forms part of the Coquet Partnership.

The meetings organised during the consultation event allowed consultees attending the opportunity to make known their views on the proposals and to suggest alternatives, which were noted and considered within the analysis of feedback. During the consultation exercise, it was made clear that the outcome of the process would not be determined by the equivalent to a simple referendum but would involve a detailed analysis of evidence put forward. A total of 125 responses were received from consultees during the informal consultation process, including alternative proposals.

Details of the persons and parties consulted, the notes of the Governing Body and staff consultation meetings, and all views and responses received are summarised in the Joint Interim Director of Children's Services Report: Outcomes of Consultation on Proposals for the Coquet Partnership, which is available on the Council's website at [Report to Cabinet 13 September 2022](#)

At their meeting on 13 September 2022, the Council's Cabinet approved the publication of the statutory proposal setting out its intention to reorganise the schools in the Coquet Partnership to a 2-tier(primary/secondary) structure, including the reduction in the age-range of JCSC from an age 9-18 to an age 11-18 school in a phase way beginning in September 2024 and concluding in September 2025.

6.2.1 Statutory Implications for James Calvert Spence College

The Council's Cabinet will meet on 17 November 2022 to decide whether or not to approve the reduction in the age range of schools in the Coquet Partnership, including the proposal to reduce the age range of JCSC, as set out in para. 6.2. Should the Council's Cabinet not approve the statutory proposal to reduce the age range of JCSC, the Council's Cabinet would need to review its capital investment in schools in the Coquet Partnership with the potential for the Options appraisal process to be repeated should JCSC remain as an age 9-18 school with the consequent resubmission of the OBC for approval.

6.2.2 Other Consultations

Current and future planning consultations

Relevant bodies have been informally consulted to develop the proposals in order to incorporate their views within the various site option appraisals. Implementation is subject to NCC approval at Cabinet on 17 November 2022.

As the preferred option for JCSC has been identified as the rebuild of JCSC on the land east of the recreation ground. These proposals would now form the basis of the planning submission.

Planning policies would be fully adhered to, appropriate sporting provision is being made to meet Sport England requirements, rights of way would be adjusted where necessary and ongoing discussions are progressing with Highways to ensure all appropriate needs and standards are met.

6.3 Risk

Several risk workshops, facilitated by NCC's Risk Manager, have been undertaken throughout the early phases of the project. These have included representatives from the Risk and Project Teams. A Risk Register has been developed and mitigation measures put in place in order for this project to proceed. The Risk Register will be constantly monitored throughout the project with key risks and issues being reported at every Project Board meeting. The Risk Register is managed by the Project Director with specific input from the Project Team.

The Risk Register contained in Appendix 6A details:

- the key risks identified during the process leading to preparation of this OBC;
- who is responsible for the mitigation; and
- the measures being taken to mitigate each risk.

6.4 Summary

Northumberland County Council has put in place resources for the duration of the project, including post contract, to monitor and maintain ongoing relations between the Northumberland County Council and JCSC to ensure the effective delivery of the project, throughout its lifetime.

A risk workshop has been held and a risk strategy developed. Risk will continue to be monitored and evaluated with any changes being reported to the Project Board on a monthly basis.

Public consultation -

Pre-statutory consultation has taken place between 11 May and 29 June 2022 on proposals to reorganise schools in the Coquet Partnership to a 2-tier(primary/secondary)



structure, including the reduction of the age range of JCSC from an age 9-18 school to an age 11-18 secondary school. Statutory Consultation on proposals for the relevant schools took place between 22 September and 20 October 2022. The Council's Cabinet will consider whether or not to approve the implementation of the statutory proposals on 17 November 2022.

The following documents are attached at **Appendix 6:**

6A	Project Risk Register
----	-----------------------

7 MOVING FORWARD

7.1 Programme Delivery

To achieve the key programme objective, identified in Section 2.1, principally handover of the building to allow occupation for September 2025 several critical path activities must be achieved, namely:

- RIBA Stage 4 Designs to be completed by the beginning of July 2023.
- Submit to planning mid-February 2023.
- Contract to be awarded end of October 2023.
- Construction to commence early January 2024.

To award contract at the end of October 2023, the tender documents must be issued no later than the end of July 2023 to allow the contractors sufficient time to price and submit their proposed tenders as well a time period for reviewing and assessing the tender submissions prior to a recommendation for acceptance.

To achieve these timescales, RIBA stage 4 designs will need to commence by the end of February 2023. This requires the design team to commence with RIBA Stage 3 immediately on approval of the OBC.

This stage would also include liaison with various stakeholders and finalisation of the site surveys and investigations to help reduce unknowns and minimise risk. The client and end user will have a review period at the end of each RIBA stage and it is essential that these timescales are followed so as not deviate from the critical path and to ensure the school can open in September 2025.

The project team can help assist with guidance and advice around tendering options and other potential platforms/routes that may be used for appointing a contractor. This will

involve liaison with NCC procurement and framework providers and their local supply partners to gauge interest and a further review of market trends to ensure the best route is chosen.

Upon receiving the tender submissions, there is a 4-week evaluation and approvals period to review the documents and to prepare the final business case for submission to NCC's full cabinet (if required).

An 80 week build programme for the New Build option is anticipated however the Contractors will be afforded the opportunity to submit an alternative tender which may realise programme benefits. Completion, ready for school occupation in September 2025, will be written into the documents as an Employer's requirement.



7.2 Summary

A critical path of scheduled delivery activities has been provided based on the proposed route to market, Design and Build Single Stage Procurement, and in line with the Public Contracts Regulations [PCR] 2015.

The RIBA Stage 3 design will need to proceed immediately on approval of the OBC for the key milestones to be achieved. The design process will progress on through to RIBA Stage 4 / tender issue level by late July 2023.





Northumberland County Council

CABINET

Date: 17 November 2022

SEND Capacity and Place Planning Strategy

Report of the Joint Interim Director of Children's Services - Audrey Kingham

Cabinet Member for Children's Services: Councillor Guy Renner-Thompson

Report Author: Sue Aviston Head of School Organisation and Resources

Purpose of Report

To advise Cabinet of the development of a 5 year SEND Capacity and Place Planning Strategy.

Recommendations

Cabinet are recommended to:

1. Approve the approach for growth within the strategy in order to increase capacity in line with predicted demand across Northumberland to meet the needs of children and young people as close to their home communities as possible.
2. Approve the annual update of the plan to ensure the information used to plan and grow capacity is reflective of the demand for specialist provision. The update will be reported to Family and Children Services Scrutiny Committee.

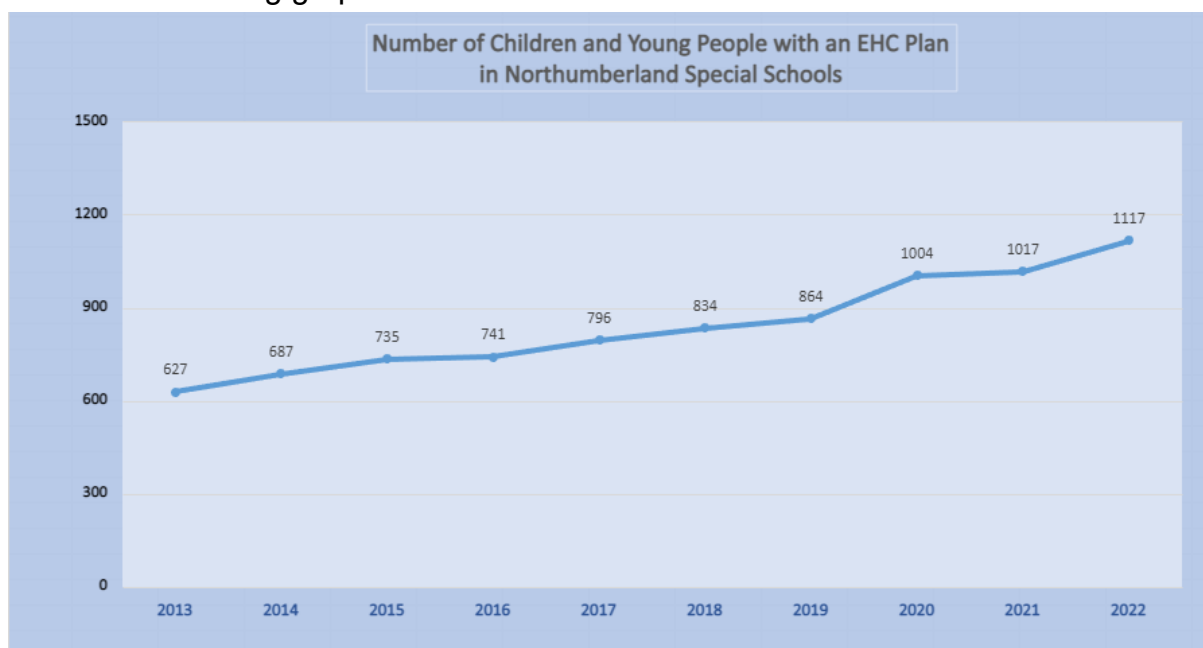
Link to Corporate Plan

These proposals are most closely linked to the Council's priority for Learning (achieving and realising potential), but it is also strongly linked with the priority for Connecting (having access to the things you need).

Key Issues

1. In Northumberland, the number of children and young people who have been diagnosed as requiring an Education and Healthcare Plan has been increasing

steadily, with significant additional capacity in the county's 9 special schools being required year on year in each of the past 10 years, as demonstrated in the following graph.



2. This steady upward trend in demand for special school places equates to an average increase over this period to date of 7% each year (actual variation from year to year has been between 1% and 16%). Overall, there are 78% more children and young people with an EHCP in Northumberland in 2022 than there were in 2013. Contributing to this is the continuing increasing demand from parents for their children to be educated within special school provision both in and out of the county.
3. Northumberland has a very robust mainstream school place-planning methodology, which has ensured the accuracy of predicting the number of school places required across the county. However, there has never been the same approach when it comes to planning for specialist places. Like most local authorities across the country, Northumberland has simply been reacting to the increased demand for places.
4. Attached at Appendix one is the first SEND Capacity and place planning Strategy that sets out:-
 - a. The need for additional specialist provision;
 - b. where increases of places and capital investment has already been achieved;
 - c. A 3 step approach to the development of SEND Capacity;
 - d. Impact on the local communities across Northumberland;
 - e. Ideas/models to increase specialist capacity;
 - f. Funding to support the implementation of the strategy.

Report Author: Sue Aviston Head of School Organisation and Resources
 Sue.Aviston@northumberland.gov.uk
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Conclusions

1. For the first time in Northumberland, a place planning methodology similar to that used to plan for mainstream school places has been utilised in order to predict the number of specialist places likely to be required over the next 5 years. This has enabled a strategy to be formulated for consultation and engagement at a local level that will enable this vulnerable group of children and young people to have their needs met as close to their home communities as possible.
2. The forecasts contained within this strategy do not include the potential impact of future interventions or strategies and will therefore be updated on an annual basis. This will ensure that information used to plan and grow capacity continues to reflect the demands for specialist provision in the light of the impact of interventions and strategies currently being implemented across Northumberland.
3. The forecasts of demand for specialist provision are provided on a school partnership basis. The data presented for each school partnership demonstrates there is a growing demand to increase specialist capacity across Northumberland with high level data suggesting that there could be a further 700 special school places required by 2026 if the current pattern of increased demand continues. Section 5 of the strategy sets out ideas on how to achieve additional capacity, as well as potential timescales and some very high-level costs. This detail is subject to detailed work within each of the school partnerships to ensure the affordability and sustainability of any plans for growth.
4. Whilst the strategy sets out a number of ideas on how additional specialist capacity could be achieved, Cabinet will be requested to make decisions on proposed capital investment for individual projects as these are brought forward, as well as statutory decisions in relation to school organisation regulations.

IMPLICATIONS ARISING OUT OF THE REPORT

Policy	The strategy is consistent with the Council's corporate priority that all residents should achieve and realise their potential.
Finance & value for money	The funding and financial implications of the strategy is set out in section 5 of the strategy. The projects and capital investment proposals will be subject to consultation Individual business cases and Cabinet approval.
Legal	<p>The Local Authority has a statutory duty to assess the local need for school places to ensure that every child can be provided with a suitable place in a state funded school in their area.</p> <p>The Children and Families Act 2014 places important statutory responsibilities on local authorities for supporting children and young people with special educational needs (SEN) and disabilities</p>
Procurement	N/A
Human Resources:	N/A
Property	N/A
Equalities (Impact Assessment Attached)	No, but an EIA would be completed in relation to individual projects to increase capacity as they are brought forward for consultation.
Risk Assessment	N/A
Crime & Disorder	This report has considered Section 17 (CDA) and the duty it imposes and there are no implications arising from it.
Customer Considerations:	The detail set out in this report is based upon a desire to act in the best educational interests of current and future children and young people in Northumberland.
Carbon Reduction	It is not envisaged that this proposal would have a significant positive or negative impact on carbon reduction.
Health and Wellbeing	The strategy aims to improve the educational experience and outcomes for the most vulnerable group of children and young people in the county by

	providing appropriate specialist provision as close to their homes communities as possible.
Wards	All

CONSULTATION

The Cabinet Member for Children's Services, Cllr Renner Thompson.

Report Sign Off

	Full name
Service Director Finance & Deputy S151 Officer	Jan Willis
Interim Monitoring Officer/Legal	Suki Binjal
Joint Interim Director of Children's Services	Audrey Kingham
Interim Chief Executive	Rick O'Farrell
Lead Member for Children's Services	Guy Renner-Thompson

Report Author Sue Aviston – Head of School Organisation and Resources
(01670) 622281 Sue.Aviston@northumberland.gov.uk

Appendices

Appendix one – SEND Capacity and Place Planning Strategy



SEND Capacity and Place Planning Strategy

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Section 1

Overview: the need for additional specialist provision

In Northumberland, the number of children and young people who have been diagnosed as requiring an Education and Healthcare Plan has been increasing steadily, with significant additional capacity in the county's 9 special schools being required year on year in each of the past 10 years, as demonstrated in the graph below.

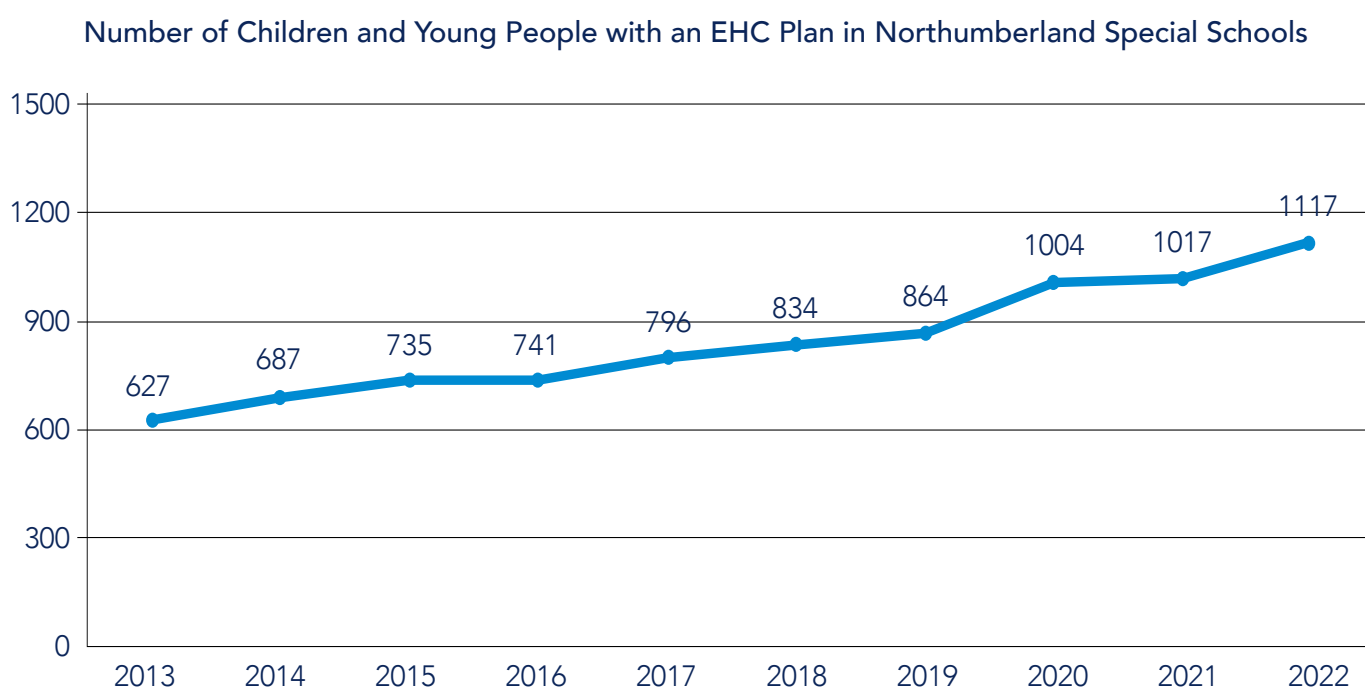


Table 1 – Number of pupils on roll in Northumberland Special Schools/Units 2013-2022

This steady upward trend in demand for special school places equates to an average increase over this period to date of 7% each year (actual variation from year to year has been between 1% and 16%). Overall, there are 78% more children and young people with an EHCP in Northumberland in 2022 than there were in 2013. Contributing to this is the continuing increasing demand from parents for their children to be educated within special school provision both in and out of the county.

The steady upward trend is also seen in the number of SEND commissioned places in the independent sector which has also seen an increase of 93 places since 2017 with the largest increases at 3 Northumberland based providers Buzz learning, GUST and Nunnykirk ([see Table 2](#)). There is however a down trend for commissioned places at Percy Hedley which has seen a reduction of 10 places since 2017.

Table 2 – Independent and non-maintained SEND settings showing number of Northumberland resident students on roll

School	2017	2018	2019	2020	2021	2022
Appletree School	1	2	2	2	1	0
Azure Charitable Enterprises	0	2	3	2	2	2
Buzz School and College	0	6	20	22	25	43
Dilston College	12	6	1	1	1	0
GUST	13	28	28	26	28	29
Howard House	1	1	0	3	5	3
High Peak	0	1	1	1	1	1
ID Academy	0	0	0	3	3	5
Kirby Moor School	6	4	6	8	9	11
Nisai Virtual Academy Ltd	1	1	2	5	3	3
North East Autism Society - Thornhill Park	1	3	2	2	2	2
North East Centre for Autism - Aycliffe	2	2	1	1	1	1
Northern Counties School	18	25	23	22	21	20
Nunnykirk School	10	27	45	41	46	35
Parkside House School	11	11	17	19	14	15
Peartree Project	1	1	1	1	4	4
Percy Hedley College	5	3	7	9	6	7
Percy Hedley School	27	21	23	20	17	13
Priory Fieldfare	0	0	0	1	1	0
Rosewood Independant School	0	0	0	0	13	18
Spark of Genius - Caledonian School	0	0	0	0	1	1
Spark of Genius - Harbour Point School	2	2	3	2	3	0
Talbot House School Newcastle	10	6	15	11	7	5
TOTAL	121	152	200	202	214	218

Note - Nunnykirk School closed on 31 August 2022

Table 3 highlights the increasing numbers of pupils with SEND that attend special schools in Northumberland.

Table 3 – Number of students attending Northumberland Special Schools by year since 2013

Special School Numbers										
School	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Atkinson House	59	50	54	58	64	71	78	72	75	75
Barndale House	35	37	40	36	38	40	37	46	48	59
Cleaswell Hill	125	148	154	161	173	175	181	187	188	194
Collingwood School and Media Arts College	104	127	142	136	136	145	144	197	201	232
Cramlington Hillcrest	45	56	58	61	72	81	88	99	100	109
Hexham Priory	60	65	76	77	88	96	99	113	113	120
NCEA Castle							102	99	99	111
NCEA Unit	98	98	98	98	98	98				
The Dales	68	72	77	76	88	89	98			
The Dales (including Ashdale)								144	148	169
The Grove	33	34	36	38	39	39	37	47	45	48
Grand Total	627	687	735	741	796	834	864	1004	1017	1117

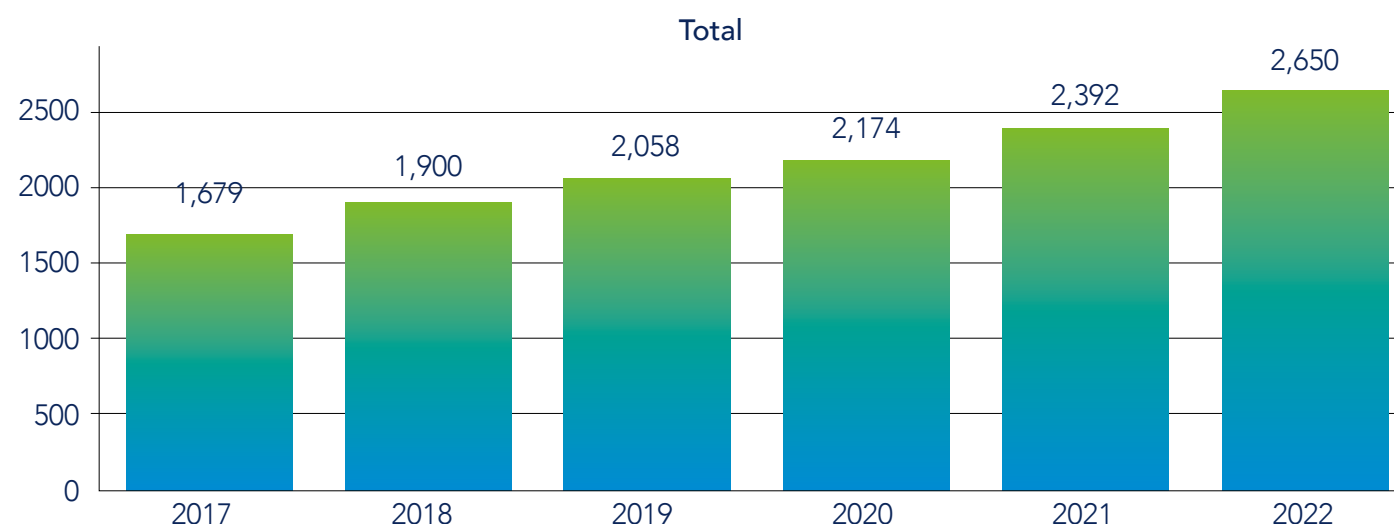
It is also widely acknowledged nationally that there are significant financial pressures on mainstream schools in supporting SEND provision, not least due to school budget pressures and expectations on schools to fund the first £6k of support for each SEND learner with an EHCP.

In particular, there has been a significant increase in the number of children and young people who have been identified with a primary special need of autism (ASD) and/or social emotional and mental

health (SEMH) needs. Northumberland has been successful in bidding for a special free school, the Gilbert Ward Academy, for secondary age young people who have autism and social, emotional and mental health needs which is planned to open in September 2023.

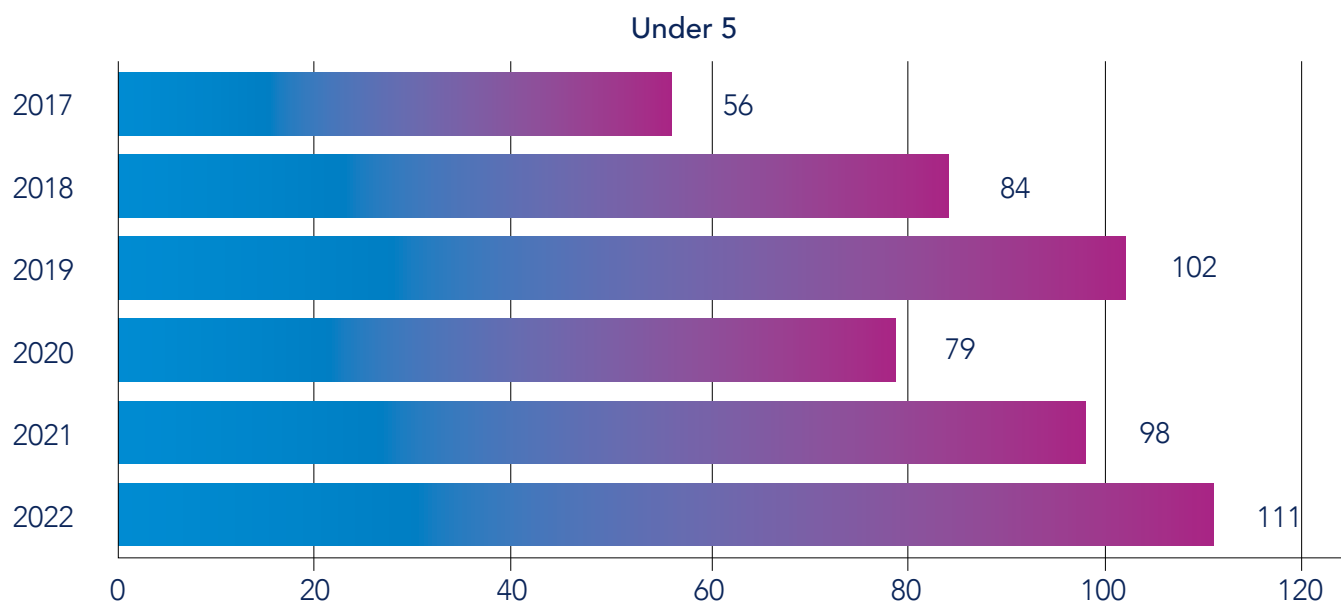
Looking at more recent data, as at the January 2022 SEN Census, 2,650 children and young people had EHCP plans; this is an increase of 58% since 2017.

Table 4 – All students resident in Northumberland with an EHCP



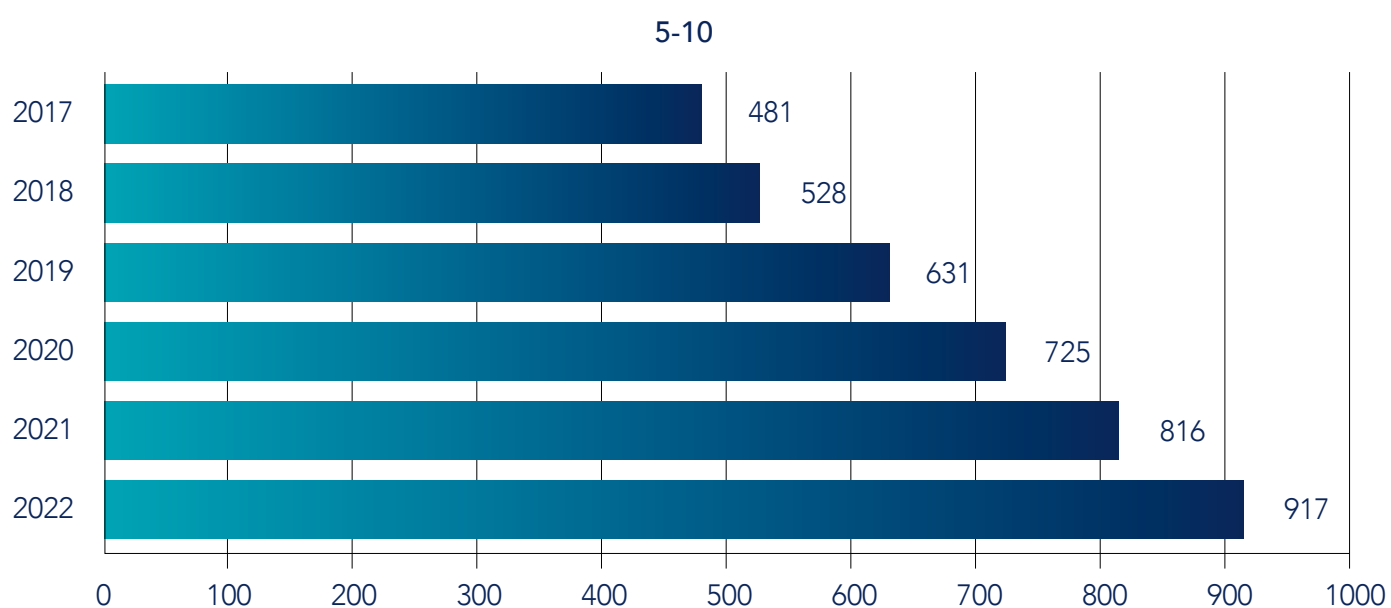
In Northumberland in 2022, 4% of children with an EHCP are under the age of five and shows an overall growing trend (albeit with a slight drop in 2020).

Table 5 – Students aged under 5 resident in Northumberland with an EHCP



Children in the 5-10 age group have shown a steady increase since 2017 and they represent 35% of the current cohort of children and young people with an EHCP in the county.

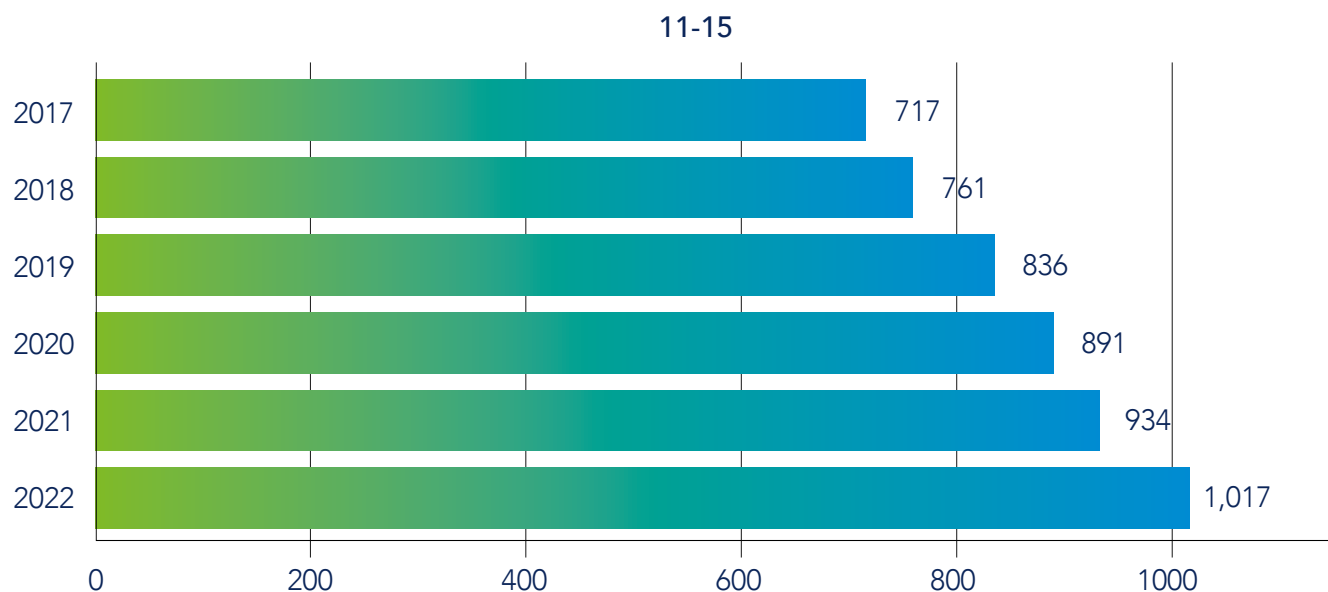
Table 6 – Students aged 5-10 resident in Northumberland with an EHCP



The 11-15 age bracket account for the largest number of children and young people with 38% of the current cohort having EHCP as at January 2022. This represents a 9% increase in this age group on the previous year, compared with a 10% rise nationally¹.

¹ Source education-statistics.service.gov.uk

Table 7 – Students aged 11-15 resident in Northumberland with an EHCP

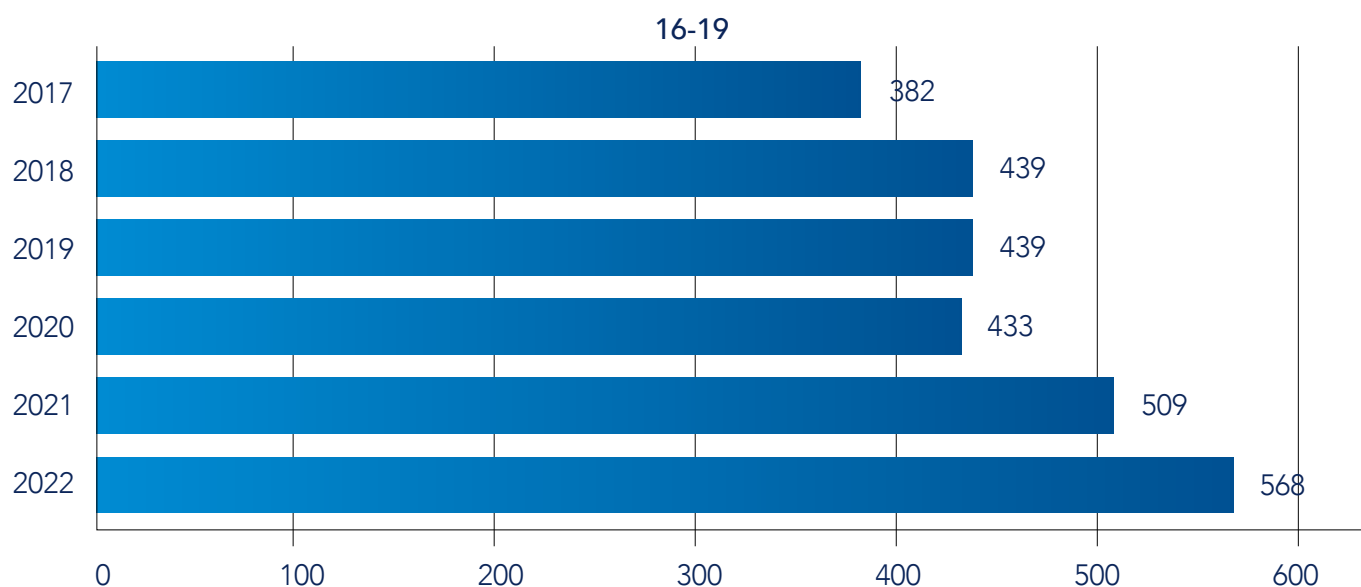


Specifically in relation to the age 5-10 group and the age 11-15 group, some of the increase in allocation of EHCPs is due to the fact that the Council no longer has top up funding (provision of funded support in school without an EHC needs assessment or EHCP), as this has been replaced with STAR (Short Term Additional Response) funding, which is time limited. Those with top up funding are being reviewed, where the decision will be made whether to cease funding or apply for an EHCP. Another factor is the

increase in demand from schools for additional funding, driven by pressures on school budgets. However, whilst there are far fewer children in mainstream schools with EHCPs in the primary phase than in the secondary phase, the gap appears to be closing.

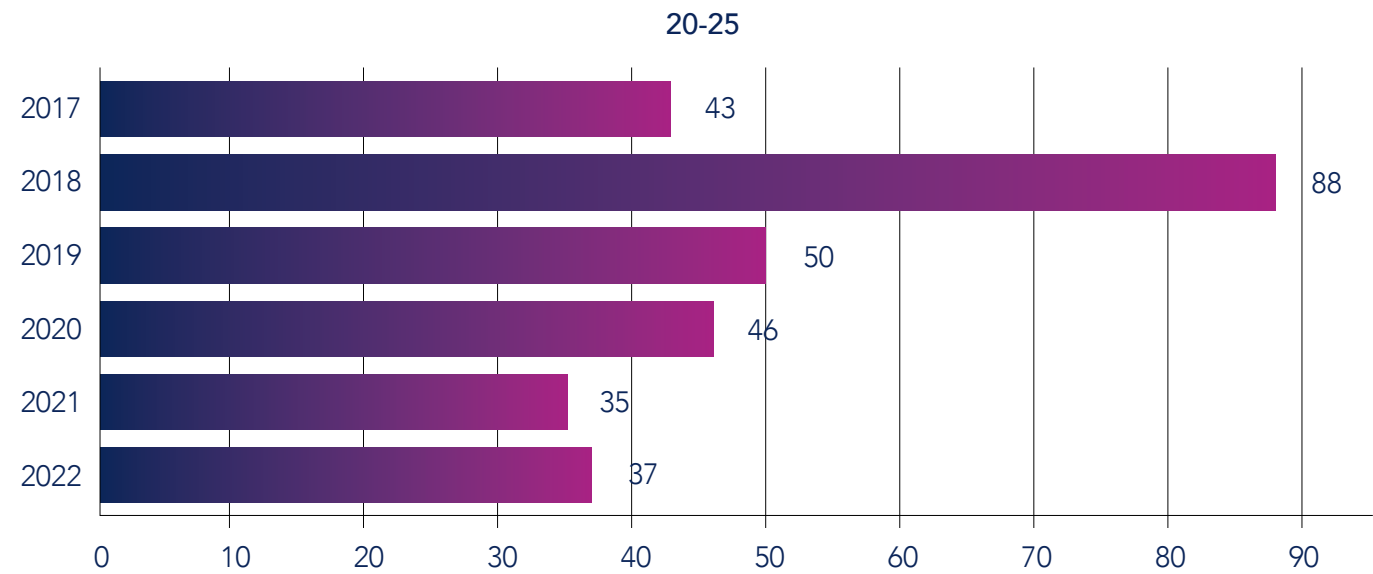
While the number of EHCPs allocated to students aged 16-19 had been relatively stable up to 2020, the number is increasing again, with 21% of the current cohort in this age group.

Table 8 - Students aged 16-19 resident in Northumberland with an EHCP



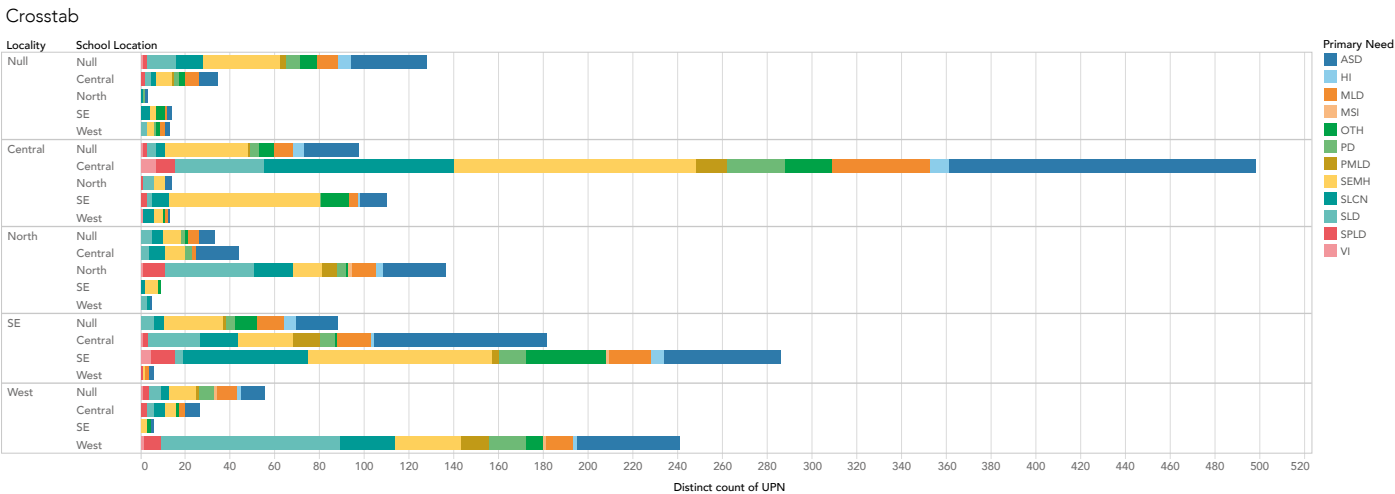
After having bucked the national trend up to 2021 with a fall in the number of young people with an EHCP in the age 20-25 group, there has been a slight increase in this cohort in 2022 representing 1.4% of the total cohort.

Table 9 - Students aged 20-25 resident in Northumberland with an EHCP



A particular issue within the context of the size of Northumberland and the location of specialist provision, are the distances that many children with SEND have to travel to attend suitable provision. Table 10 shows where children on roll in a special school in Northumberland live compared to where they have to travel for their education (see following graph):

Table 10 – SEND student residential area compared to school location



The graph above shows in which area of the County (North, Central, South East and West) children with an EHCP on roll in mainstream and Special Schools reside compared to where they travel to receive their education. For example, the majority of children resident in the Central sector of the County with an EHCP receive their education in the Central and South East areas, therefore have the shortest journeys to school. Relative to the total number of

children with EHCPs living in the west of the county, more have further to travel either to other areas of the county or out of county. The proportion of children denoted with 'null' in the above graph shows those children living in the various parts of the county who are educated out of county.

Section 2

Recent Capital Projects to Increase SEND Provision

In late 2017, the Council consulted on its Vision and Strategy for children and young people with SEND for 2017 to 2020 which formed the basis of the Northumberland SEND strategy at that time. Following the 2017/18 consultation the council committed to develop models and focus the council's resources it was proposed to consult based on the areas of greatest need.

The priority area for expansion was identified as the south-east and central areas of the county. These areas have seen the greatest increase in demand for places in our special schools. In order to meet this increased demand, it was proposed to consult on growing capacity at Cleaswell Hill Special School in Guidepost, Collingwood Special School in Morpeth, Hillcrest Special School in Cramlington and The Dales Special School in Blyth. No projects to increase capacity were taken forward at that time, and no further consultation was undertaken following the publication of the report in April 2018. Currently, there is some work being undertaken to provide some growth capacity for Cleaswell Hill through use of the Sycamore Centre.



Capital works to create pilot Additionally Resourced Provisions (ARPs) at Astley High and Seaton Sluice First Schools have been completed with the first school ARP becoming operational in April 2021 and the secondary ARP opening in September 2021. The findings from the 2017/18 consultation found there was clear support from parents and carers to grow specialist units on mainstream school sites, particularly those in the west and the north where there is the least concentration of pupils. There was however very limited feedback from the schools themselves on these options. The proposal at the time was to hold discussions with all Northumberland Schools and Academies in order to co-produce a plan for consultation on growing capacity in mainstream schools.

Although the implementation of the SEND strategy was delayed due to the COVID pandemic, the opportunity to revisit the strategy has been taken and the "Northumberland Local Area Strategy for Children, Young People and their families with Special Educational Needs and/or Disabilities 2021-2024" was developed and published in June 2021.

One of the key principles of the new SEND Strategy is:

- **Developing high quality inclusive provision with every child/young person having access to a good school that is as close to home as possible;**

This principle neatly dovetails with the purpose of this SEND Capacity and Place Planning Strategy, the key focus of which is to grow specialist provision

within Northumberland to ensure children with SEND are educated as close to home as possible in high quality education establishments.

Although the earlier SEND strategy was not fully realised, since 2017 capital works have been carried out to increase SEND capacity in Northumberland and include the following schemes:

- A capital scheme was undertaken to provide 50 special education places at Ashdale, a satellite site of The Dales School, Blyth; this high-quality unit was developed in a former sixth form provision and was nominated for an industry recognised building award.
- A capital scheme has provided 32 places at Hexham Priory Academy School through expansion on the current site, creating a further 32 places for local children.
- A capital scheme has provided an additional 10 places at Hillcrest Special School.
- A capital scheme was undertaken to refurbish a former Children's Centre on the Collingwood site to create specialist Sixth Form accommodation thereby allowing an increase in capacity of 12 to 16 pupils.
- A capital scheme to provide an Additionally Resourced Provision (ARP) was completed at Astley High School in early 2021, with specialist provision now on site for up to ten students with ASD and those with emotional vulnerability needs.
- A capital scheme to provide an ARP at Seaton Sluice First School was completed with provision for up to 12 pupils aged 4-9 with a broad range of needs, including ASD, Communication and Interaction, and Moderate Learning Difficulties.
- The new ARPs are assisting with higher number of students with SEND on roll in mainstream schools in the Seaton Valley Partnership and neighbouring partnerships.
- The Council submitted a successful bid to the DfE for the establishment of a free special school in Blyth that will provide 80 places for children with social and emotional mental health issues (SEMH) and autistic spectrum disorder (ASD) and this has been successful. The initial proposal is that 50 of these places would be allocated to children resident in Northumberland, with ten places each allocated to children resident in the North Tyneside, Gateshead and Newcastle council areas. A suitable site has been identified and a successful sponsor has been appointed and is now working on the plan for the school. The new school is planned to open in 2023.

The Role of the Pupil Referral Unit (PRU)

Northumberland's Pupil Referral Unit is a short stay school for pupils experiencing social, emotional and mental health difficulties that result in exclusions and suspensions from their mainstream setting. The goal is to provide support and intervention in a smaller setting with specialist staff to enable learners to successfully reintegrate back into school.

There are 3 referral pathways into the PRU;

- schools can refer directly for pupils requiring a shared 'dually registered' placement, this is time specific and should result in the young person going back to their home school.
- the Council can refer permanently excluded pupils with a view to identifying and supporting any un-met needs to ensure they have a pathway back into a permanent educational setting.
- Referral via the Council's Fair Access Panel; complex or hard to place learners moving into the County, might be allocated a place in the PRU if it is thought to be the most appropriate setting to assess their needs before identifying a school.

Plans are being developed to change the age range of the PRU to become an age 11 to 16 (Key Stage 3 and Key Stage 4) provision from September 2022, with numbers expected to increase throughout the academic year. The PRU will be commissioned for 40 places in September 2022, with a reasonable possibility of growth to 60 places into 2023/24 as demand arises.

At the same time as the change of age range, it is also proposed to relocate the PRU to more suitable premises, as the current facilities at Hepscott Park PRU would not be suitable for older students. It is therefore proposed that the PRU will move to the former building of Emily Wilding Davison School in Seghill, in October 2022 or as close to that date as practically possible.

Section 3

Methodology for developing capital projects to meet future growth

The methodology used to identify the need for additional SEND capacity across Northumberland is proposed to be a 3-step approach:

- Annual SEND Forecasting at county and partnership levels, developed from the current mainstream pupil forecasting process:
- Annual SENCo survey for data on current cohorts in first, primary and middle schools:
- Partnership workshops to review local data and discuss potential solutions.

Annual SEND Forecasting

The process used for mainstream pupil forecasting, which uses past pupil numbers and planned housebuilding to predict future pupil numbers, has been adapted for use with SEND data. The current Northumberland level forecasts by year group for pupils with ASD as a primary need and pupils with SEMH as a primary need at the county level are set out in Tables 11 and 12, which are based on the number of students currently on roll in special schools in the county.

As this is a new method of forecasting SEND data for Northumberland, these forecasts are limited to current data and do not include the potential impact of future interventions or strategies. As such, they are limited to a five-year forecast and are used as guidance on potential future numbers until the body of data becomes more robust. With that caveat in mind, the forecasts at Table 11 and 12 suggest that the numbers of students being allocated an EHCP with respect to a primary need in ASD or SEMH will continue to rise significantly year on year for the 5-year forecast period.

Table 11 - All Northumberland - ASD Five year forecast

NORTHUMBERLAND															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	38	46	60	71	65	78	66	86	94	90	85	66	53	41	940
2023	34	51	60	82	86	82	90	73	105	109	100	89	54	52	1067
2024	34	46	67	83	100	108	95	99	89	121	119	104	74	53	1193
2025	34	45	60	92	100	127	125	104	120	102	133	125	87	72	1327
2026	35	45	60	83	112	127	146	138	127	138	112	140	105	84	1451

Table 12 - All Northumberland - SEMH Five year forecast

NORTHUMBERLAND															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	44	72	102	109	119	161	189	182	172	153	128	125	75	60	1693
2023	41	74	103	119	130	135	177	196	187	171	145	113	71	58	1720
2024	41	69	106	120	141	148	149	183	201	186	162	128	64	55	1753
2025	41	69	99	124	143	161	162	154	187	200	176	143	72	49	1781
2026	41	69	99	116	148	162	177	168	158	186	189	155	81	56	1806

SEND forecasts at the partnership level have now been developed to provide key data on SEMH and ASD growth so that capital projects can be developed to increase capacity to meet the right SEND needs in the right places in the county. Individual SEND partnership forecasts will also be produced annually and these will provide the key element of forecast data to assist with specific SEND capacity planning by area ([See Section 4](#)).

Annual SENCo Survey

As part of the 3-step approach to providing a triangulated assessment of SEN needs in the county, an initial survey of SENCOs working in mainstream schools and academies in Northumberland took place in Autumn 2021 in order to gain the view of those working at the 'coal-face' with regard to the potential for future places in specialist provision and special schools. The 10 survey questions asked for a mixture of factual data and subjective responses from the SENCOs based on their professional opinions as follows:

1. How many children in your Reception class have an EHCP?
2. How many children in your Reception class with an EHCP do you think will need a place in a Special School at Year 7?
3. How many children in Year 4 in your school have an EHCP?
4. How many children in Year 4 with an EHCP do you think will need a place in a Special School at Year 7?
5. How many children in Year 5 in your school have an EHCP?
6. How many children in Year 5 with an EHCP do you think will need a place in a Special School at Year 7?
7. How many children in Year 5 at your school currently are the subject of a COSA (Consideration of Statutory Assessment)?
8. How many children in Year 6 in your school have an EHCP?
9. How many children in Year 6 with an EHCP do you think will need a place in a Special School at Year 7?
10. How many children in Year 6 at your school currently are the subject of a COSA (Consideration of Statutory Assessment)?

This process will be repeated annually each Summer Term, beginning in 2022 ahead of the formation of transition plans for children and young people in the following Autumn term to manage their phase changes. While the data provided will assist with timely identification of capacity needs so that capital projects can be developed well-in advance of places being required in the following September, it will also assist with longer term capacity planning.

Table 13 provides an analysis of the data gathered from the SENCOs responses at the Northumberland level:

Table 13 – Feedback from SENCOs at Northumberland level

ALL Partnerships	
Children in reception with EHCP	48
Reception children needing a Y7 place in Special School	30
Children in Y4 with EHCP	73
Y4 children needing a Y7 place in Special School	37
Children in Y5 with EHCP	75
Y5 children needing a Y7 place in Special School	39
Y5 children COSA applications	61
Children in Y6 with EHCP	75
Y6 children needing a Y7 place in Special School	29
Y6 children COSA applications	45

The data provided in Table 13 indicates there is a significant jump in children with an EHCP in Reception classes when compared to the number of children with an EHCP in Years 4, 5 and 6, probably as a result of needs emerging as children progress through school. This is the first set of data provided by SENCOs, therefore this initial information will be assessed with caution – however, it provides a benchmark against which to compare future survey results that, together with the other 2 steps in this methodology, will assist in providing more robust forecasts of SEN numbers to assist with capacity planning. However, in this first iteration of the SEND Capacity and Place Planning Strategy, the initial data provided by SENCOs in Autumn 2021 at partnership level is provided for information with no conclusions being drawn at this stage.



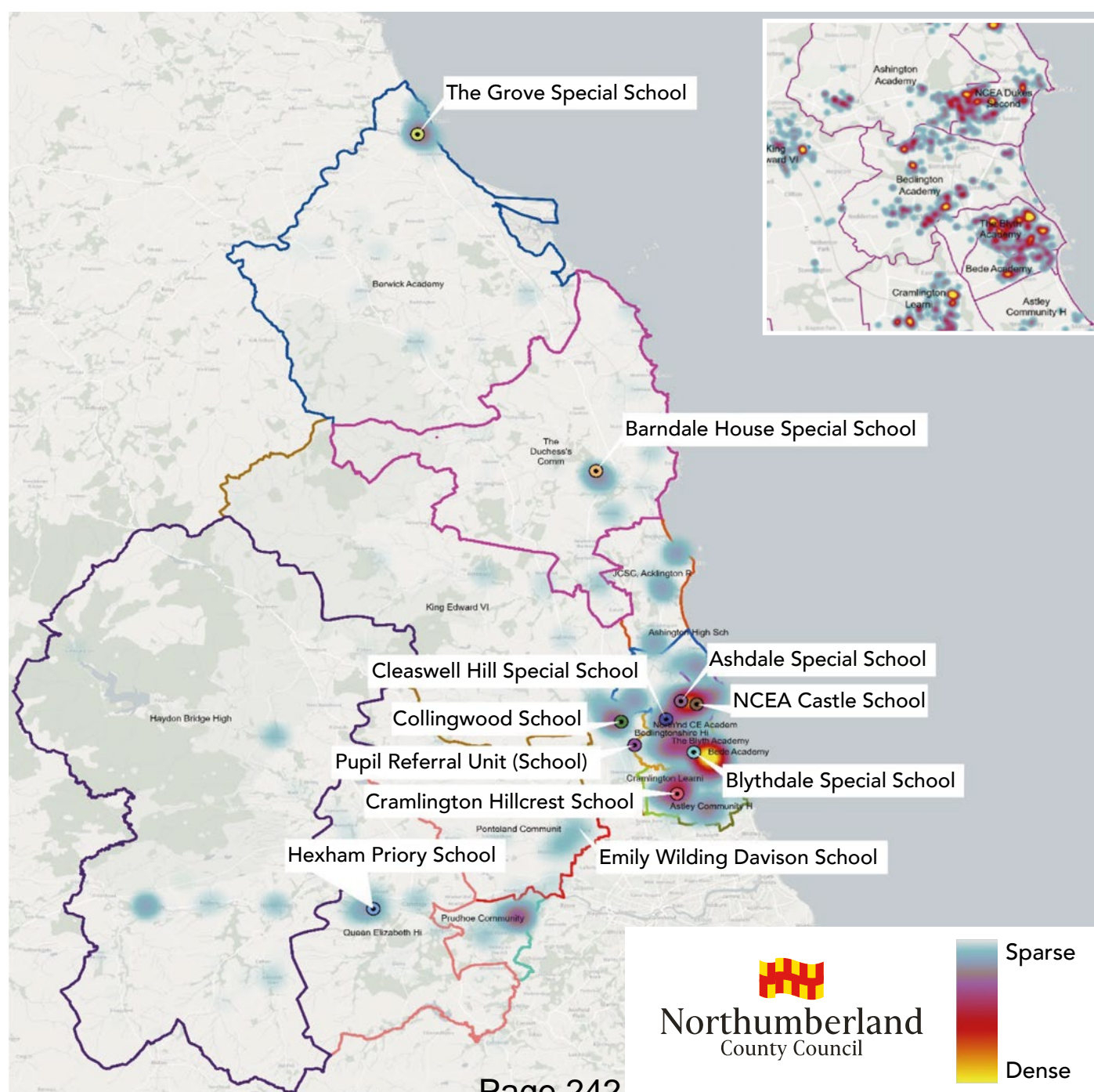
Section 4

School Partnership Data

Forecasts for ASD and SEMH at the partnership level are based on pupils residing in the relevant partnership who have an EHCP on roll in mainstream schools and special schools (which may be in or out of county).

The map below shows the locations of the maintained special schools in the county, and the school partnerships they are located within.

ALL Northumberland EHCP Students (Y0-Y11)



Key to primary needs abbreviations:

SpLD	Specific Learning Difficulty	MLD	Moderate Learning Difficulty
VI	Visual Impairment	MSI	Multi- sensory impairment
OTH	Other Difficulty/Disability,	SLD	Severe Learning Difficulty
HI	Hearing Impairment	PMLD	Profound and Multiple Learning Difficulty
SLCN	Speech, language and Communication	PD	Physical Disability
ASD	Autistic Spectrum Disorder		
SEMH	Social, Emotional and Mental Health		

Alnwick Partnership

Current provision within the partnership area

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
Barndale Special School, Alnwick	2-19	AS; HI; MLD; PD; SEMH; SLCN; SLD; SPLD; OTH	60	59

SEN Forecasts

Table 14 – Alnwick Partnership: ASD Forecast September 2022-September 2026

ALNWICK PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	1	1	2	1	2	0	6	7	5	11	12	7	4	3	60
2023	1	1	1	1	1	3	0	7	9	8	14	13	4	5	66
2024	1	1	1	0	1	2	4	0	8	14	10	16	8	5	70
2025	1	1	1	0	0	1	2	5	0	13	18	11	10	10	73
2026	1	1	1	0	0	0	1	3	6	0	16	20	7	13	68

Table 15 – Alnwick Partnership: SEMH Forecast September 2022-September 2026

ALNWICK PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	5	4	1	8	10	9	17	8	11	12	5	11	5	3	111
2023	4	7	5	2	15	15	11	16	11	12	15	4	5	4	125
2024	4	5	9	6	3	21	18	10	20	11	15	13	2	4	142
2025	4	5	7	11	10	4	26	17	13	20	13	13	6	2	151
2026	4	5	7	9	19	15	5	24	22	13	26	12	5	5	170

Table 16 – Alnwick Partnership: Data and information received from SENCos Autumn 2021

Alnwick Partnership	
Children in reception with EHCP	Under 5
Reception children needing a Y7 place in Special School	0
Children in Y4 with EHCP	5
Y4 children needing a Y7 place in Special School	Under 5
Children in Y5 with EHCP	6
Y5 children needing a Y7 place in Special School	Under 5
Y5 children COSA applications	Under 5
Children in Y6 with EHCP	Under 5
Y6 children needing a Y7 place in Special School	0
Y6 children COSA applications	Under 5

Commentary

Tables 14 and 15 suggest there will be a steady growth in the number of students diagnosed with ASD living in the Alnwick Partnership in the next 5-year period, but the significant growth forecasted appears to be in relation to students diagnosed with SEMH. Part of the solution to accommodate this growth could be the proposed Barndale satellite site in the Coquet Partnership ([see later](#)) currently under consultation, as this would be a fairly local solution in relation to the Alnwick area. However, this would not be sufficient to meet all of the capacity needs suggested by these forecasts. Additional provision will be required within the Alnwick area and therefore it is proposed that Barndale Special School would be expanded on its current site, or an alternative/new build would be identified ([See Section 5](#)).



Ashington and NCEA Partnerships

Current Provision

Together the Ashington Partnership and NCEA Partnership serve the areas in and around the towns and villages of Ashington, Pegswood, Linton, Ellington, Lynemouth and Newbiggin-by-the-sea.

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
NCEA Castle School, Hirst, Ashington (academy)	2-19	ASD; MLD; MSI; PD; PMLD; SLCN; SLD; VI	109	111
Ashdale, Ashington (satellite of The Dales)	4-11	SpLD; VI; OTH; H; SLCN; ASD; SEMH; MLD; SLD; PMLD	50	50

SEN Forecasts

Table 17 – Ashington Partnership: ASD Forecast September 2022-September 2026

ASHINGTON PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	2	3	2	8	4	18	9	13	3	6	9	6	2	4	89
2023	2	2	3	3	10	6	20	10	14	3	8	16	4	2	103
2024	2	2	2	4	4	14	6	24	11	15	4	15	11	3	117
2025	2	2	2	3	6	6	16	7	25	12	19	8	10	8	125
2026	2	2	2	3	4	8	6	19	8	27	15	35	5	8	143

Table 18 – NCEA Partnership: ASD Forecast September 2022-September 2026

NCEA PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	3	3	6	6	7	9	26	18	9	12	7	9	12	3	130
2023	3	4	4	9	9	11	14	32	18	12	14	9	7	7	154
2024	3	6	5	6	12	13	16	18	34	24	15	17	6	4	179
2025	3	6	6	8	8	19	20	21	19	44	29	17	12	4	216
2026	3	6	6	10	11	13	28	26	22	24	53	34	13	8	256

Table 19 – Ashington Partnership: SEMH Forecast September 2022-September 2026

ASHINGTON PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	1	2	9	4	11	15	12	11	15	21	12	11	9	3	134
2023	2	2	3	10	6	14	15	14	10	20	20	10	8	5	139
2024	2	5	3	3	13	8	15	19	12	13	19	18	8	4	142
2025	2	5	6	3	4	18	8	18	16	17	13	18	13	4	145
2026	2	5	6	7	4	6	18	10	16	22	16	11	13	7	144

Table 20 – NCEA Partnership: SEMH Forecast September 2022-September 2026

NCEA PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	11	22	24	16	13	34	35	28	20	26	14	19	11	5	276
2023	8	42	33	29	20	19	45	42	32	25	23	12	8	7	347
2024	8	28	63	40	37	30	25	55	49	42	23	20	5	6	431
2025	8	28	42	76	51	55	40	31	64	63	38	20	9	4	527
2026	8	28	42	50	97	76	73	48	36	82	57	33	9	6	646

Table 21 – Ashington and NCEA Partnerships: Data and information received from SENCoS Autumn 2021

Ashington and NCEA Partnership	
Children in reception with EHCP	6
Reception children needing a Y7 place in Special School	5
Children in Y4 with EHCP	7
Y4 children needing a Y7 place in Special School	7
Children in Y5 with EHCP	6
Y5 children needing a Y7 place in Special School	6
Y5 children COSA applications	8
Children in Y6 with EHCP	Under 5
Y6 children needing a Y7 place in Special School	Under 5
Y6 children COSA applications	5



Commentary

Tables 17 and 18 suggest there will be a significant increase of young people with ASD as a primary need across the whole Ashington area. In relation to SEMH, the forecasts suggest a modest increase in SEMH in the Ashington Partnership, but a much more significant increase in the NCEA Partnership area beginning in the early primary years.

Solutions to address this growth will be discussed with the schools and academies in both partnerships as part of the roll-out of the '3-point' plan, but an initial point for discussion could be the expansion of NCEA Castle and Ashdale. Additional capacity may also be available via Buzz Learning, an independent special school in Ashington.

Furthermore, the proximity of the Ashington and NCEA Partnerships to Bedlington, Blyth, and Cramlington Partnerships via the A189 corridor means that a wider view of provision for the whole South East locality can be taken when identifying solutions. Given the identified need in this locality, all partnerships discussions will be programmed to take place early in the roll-out timetable.

Bedlington Partnership

Current Provision

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
Cleaswell Hill, Guidepost, Bedlington	2-19	SpLD; VI; OTH; HI; SLCN; ASD; SEMH; MSI; PD; MLD; SLD; PMLD	187	194

SEN Forecasts

Table 22 – Bedlington Partnership: ASD Forecast September 2022-September 2026

BEDLINGTON PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	9	12	8	8	8	7	9	18	20	22	9	4	3	5	142
2023	8	27	16	11	11	9	9	11	27	29	24	8	3	3	196
2024	8	23	36	23	15	12	10	11	18	39	32	21	6	3	256
2025	8	23	31	51	30	16	14	12	16	25	44	28	17	6	320
2026	7	23	31	43	68	32	18	17	19	24	28	38	22	15	386

Table 23 – Bedlington Partnership: SEMH Forecast September 2022-September 2026

BEDLINGTON PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	3	4	6	11	18	17	24	18	25	9	20	22	10	8	195
2023	3	3	5	7	14	21	17	24	17	25	8	22	15	6	187
2024	3	4	4	6	9	16	21	17	22	17	23	9	15	10	176
2025	3	4	6	6	8	10	15	20	16	22	15	26	6	10	168
2026	3	4	6	7	7	9	10	15	19	16	20	17	17	4	155

Table 24 – Bedlington Partnerships: Data and information received from SENCos Autumn 2021

Bedlington Partnership	
Children in reception with EHCP	6
Reception children needing a Y7 place in Special School	Under 5
Children in Y4 with EHCP	Under 5
Y4 children needing a Y7 place in Special School	Under 5
Children in Y5 with EHCP	10
Y5 children needing a Y7 place in Special School	7
Y5 children COSA applications	14
Children in Y6 with EHCP	5
Y6 children needing a Y7 place in Special School	Under 5
Y6 children COSA applications	Under 5



Commentary

With a capacity of 187, Cleaswell Hill Special School is already the largest specialist provision in Northumberland. Given the significant increase in pupils being diagnosed with ASD in Bedlington over the forecast period ([see Table 22](#)), additional provision will be needed to serve this partnership area. While expansion of Cleaswell Hill could provide part of the solution to increasing provision in this partnership area, the number of students already on roll will need to be borne in mind to ensure the educational experience of those students is not impacted negatively.

Many of the secondary-age students living in the Bedlington area with SEMH and/or ASD attend the Emily Wilding Davison school, while the Gilbert Ward Academy will open in Blyth in September 2023 and will provide 80 places for secondary provision for SEMH and ASD needs serving the South East locality area.

As highlighted under the Ashington and NCEA Partnerships, Bedlington is one of the 5 partnerships in the South East Locality in close proximity to the A189 corridor and will be included in the overall solution for additional provision in this area. As for the Ashington and NCEA Partnerships, solutions to address the growing needs of children and young people living in the Bedlington area will be discussed with the schools and academies in the partnership as part of the roll-out of the '3-point' assessment programme at an early point in the timetable.

Berwick Partnership

Current Provision

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
The Grove, Berwick	2-19	ASD; MSI; SLD; PMLD; MLD; PD; SLCN; SPLD	48	48

SEN Forecasts

Table 25 – Berwick Partnership: ASD Forecast September 2022-September 2026

BERWICK PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	1	1	4	1	6	6	8	4	16	5	9	3	6	2	71
2023	3	2	1	6	2	7	8	7	8	15	7	8	2	6	81
2024	3	4	2	2	7	2	9	7	15	8	22	6	6	2	95
2025	3	4	4	2	2	8	2	8	15	15	11	20	5	6	106
2026	2	4	4	5	3	2	10	2	18	15	22	10	15	5	118

Table 26 – Berwick Partnership: SEMH Forecast September 2022-September 2026

BERWICK PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	0	3	2	9	16	18	8	13	8	9	13	7	4	2	111
2023	0	0	5	3	11	20	15	10	12	9	9	10	3	3	108
2024	0	0	0	8	4	14	16	17	9	13	9	6	4	2	102
2025	0	0	0	1	9	4	11	19	16	10	13	7	3	3	95
2026	1	0	0	0	1	11	4	13	18	17	10	10	3	2	89

Table 27 – Berwick Partnership: Data and information received from SENCoS Autumn 2021

Berwick Partnership	
Children in reception with EHCP	9
Reception children needing a Y7 place in Special School	6
Children in Y4 with EHCP	6
Y4 children needing a Y7 place in Special School	Under 5
Children in Y5 with EHCP	Under 5
Y5 children needing a Y7 place in Special School	0
Y5 children COSA applications	0
Children in Y6 with EHCP	6
Y6 children needing a Y7 place in Special School	Under 5
Y6 children COSA applications	5

Commentary

The Council has allocated funding for the rebuilding/refurbishment of school buildings in the Berwick Partnership in its Medium-Term Plan. However, before embarking on this buildings programme, the Council is undertaking Phase 1 consultation with schools, parents and the wider public on whether the structure of the Berwick Partnership should remain as a 3-tier system or whether it should be reorganised as a 2-tier (primary/secondary) system. Phase 2 consultation if approved would include specific proposals for individual schools.

As part of this process, the opportunity has been taken to have a 'joined-up' approach and to review the current extent of the specialist provision within the Berwick Partnership area against the forecasted need for provision. The Grove Special School is the only specialist provision in the partnership area with a capacity of 46, but Tables 25 and 26 indicates that there is need for additional specialist provision in this part of the county.

A workshop was held with the headteachers of all schools in the Berwick Partnership and The Grove Special school during Phase 1 consultation to review the data in Tables 25 and 26 to discuss how and where additional specialist provision could be provided in the partnership. The initial proposals arising from this workshop suggest additional provision could be developed on site within schools in the partnership at the primary and secondary phase. The views of SEND parent/carer forums in the Berwick/North Northumberland area on these initial proposals will also be sought in order to shape and refine any proposals brought forward in Phase 2 consultation.



Blyth and Bede Partnerships

Current Provision

Together the Blyth Partnership and the Bede Partnership serve the conurbation of Blyth.

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
The Dales (Blythdale siteC), Blyth	4-11	ASD; HI; MLD; OTH; PD; SEMH; SLCN; SLD; SPLD	115	117
The Gilbert Ward Academy, Blyth (free school - opens September 2023)	11-16	SEMH; ASD	80	N/A

SEN Forecasts

Table 28 – Bede Partnership: ASD Forecast September 2022-September 2026

BEDE PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	0	0	5	7	4	4	6	6	2	10	4	8	3	3	61
2023	1	2	2	7	10	5	6	7	6	2	12	3	5	2	67
2024	1	1	0	0	9	11	7	7	7	7	3	12	2	5	73
2025	1	1	2	2	0	0	15	19	8	9	10	8	2	7	75
2026	1	1	2	2	0	0	15	19	8	9	10	8	2	7	84

Table 29 – Blyth Partnership: ASD Forecast September 2022-September 2026

BLYTH PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	8	6	4	11	7	3	12	6	13	11	10	13	7	4	115
2023	6	9	9	7	13	8	4	12	8	17	12	11	11	7	133
2024	6	7	13	14	8	15	10	4	15	10	19	13	9	11	155
2025	6	7	10	21	16	9	17	10	5	20	12	21	11	9	175
2026	6	7	10	16	25	19	11	17	12	7	22	13	18	11	195



Table 30 – Bede Partnership: SEMH Forecast September 2022-September 2026

BEDE PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	0	1	4	4	2	9	11	15	15	8	7	4	3	12	96
2023	0	0	2	5	6	2	10	10	19	15	6	6	2	5	89
2024	0	0	1	2	8	7	2	9	12	20	11	5	4	3	84
2025	0	0	1	1	4	9	7	2	11	13	14	10	3	5	81
2026	0	0	1	1	1	4	10	7	2	12	9	13	6	5	71

Table 31 – Blyth Partnership: SEMH Forecast September 2022-September 2026

BLYTH PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	3	5	14	10	4	8	25	28	13	15	5	18	12	10	167
2023	4	4	6	13	9	4	8	29	31	11	15	5	10	10	160
2024	4	6	6	6	12	10	4	10	32	25	11	15	3	9	152
2025	4	6	8	6	6	13	11	5	11	25	25	10	9	2	141
2026	3	6	8	8	5	6	15	13	6	9	25	24	6	8	141

Table 32 – Bede and Blyth Partnerships: Data and information received from SENCOs Autumn 2021

Bede and Blyth Partnerships	
Children in reception with EHCP	Under 5
Reception children needing a Y7 place in Special School	Under 5
Children in Y4 with EHCP	11
Y4 children needing a Y7 place in Special School	6
Children in Y5 with EHCP	14
Y5 children needing a Y7 place in Special School	6
Y5 children COSA applications	11
Children in Y6 with EHCP	20
Y6 children needing a Y7 place in Special School	7
Y6 children COSA applications	5

Commentary

Tables 28 and 29 indicate that the ASD is the primary need increasing most in the Blyth area and this growth covers both the primary and secondary years. Tables 30 and 31 indicate that SEMH numbers may decrease over the forecast period in the Blyth area.

Many of the secondary-age students living in the Blyth area with SEMH and/or ASD attend the Emily Wilding Davison school, while the Gilbert Ward Academy will open in Blyth in September 2023 and will provide 80 places for secondary provision for SEMH and ASD needs serving the South East locality area.

However, given the forecasted level of growth in the South East locality in general, the Bede and Blyth Partnerships will be included when identifying what and where additional provision is required in this area and discussions with the schools and academies in these partnerships will be programmed to take place at an early point in the timetable as part of the roll-out of the '3-point' assessment programme.



Coquet Partnership

Current Provision

There is no specialist provision currently located within the Coquet Partnership, which means that all students residing within the partnership who need to attend a special school must travel out of catchment and in some cases, out of county for their education.

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
Barndale Special School satellite provision at Amble (under consultation)	2-19	ASD; SEMH	tbc	N/A

SEN Forecasts

Table 33 – Coquet Partnership: ASD Forecast September 2022-September 2026

COQUET PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	1	2	4	13	3	9	3	8	4	4	7	7	1	4	68
2023	1	1	2	9	12	5	12	3	6	5	4	8	5	1	76
2024	1	1	2	5	9	22	7	15	3	9	6	4	7	5	94
2025	1	1	2	3	5	16	29	9	12	4	9	6	4	6	106
2026	1	1	2	4	3	8	21	38	7	17	4	10	5	3	123

Table 34 – Coquet Partnership: SEMH Forecast September 2022-September 2026

COQUET PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	3	5	8	10	7	8	8	9	9	8	5	7	3	5	95
2023	3	7	8	8	14	6	7	10	10	8	8	5	4	3	100
2024	3	8	11	9	11	11	5	8	10	8	9	8	3	3	107
2025	3	8	12	11	11	9	11	6	9	9	9	8	4	3	113
2026	3	8	12	13	15	10	9	12	6	7	9	8	5	4	121

Table 35 – Coquet Partnership: Data and information received from SENCos Autumn 2021

Coquet Partnerships	
Children in reception with EHCP	0
Reception children needing a Y7 place in Special School	0
Children in Y4 with EHCP	Under 5
Y4 children needing a Y7 place in Special School	Under 5
Children in Y5 with EHCP	Under 5
Y5 children needing a Y7 place in Special School	Under 5
Y5 children COSA applications	Under 5
Children in Y6 with EHCP	0
Y6 children needing a Y7 place in Special School	0
Y6 children COSA applications	Under 5

Commentary

Consultation is currently taking place on proposals for the reorganisation of the mainstream schools in the partnership to a primary/secondary structure. As part of this process, the opportunity has been taken to have a 'joined-up' approach and to review whether there is a need for specialist provision to be located within the Coquet Partnership. Officers organised a workshop with the Coquet schools headteachers, supported by the head of Barndale Special School to review the current number of students leaving the partnership every day and to consider the initial forecasts for ASD and SEMH needs in the area.

A proposal emerged with the support of all headteachers in the Coquet Partnership for a satellite of Barndale Special School to be established as a stand-alone provision within the current South Avenue building of James Calvert Spence College (JCSC) in Amble. Under the proposal, this satellite provision would share the South Avenue building either with JCSC if the current organisation of schools remains in place or with Amble First School, as put forward as part of the primary/secondary proposals.



Cramlington Partnership

Current Provision

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
Hillcrest Special School, Cramlington	11-18	AS; SEMH; HI; SLCN; SLD; SPLD; MLD	110	109

SEN Forecasts

Table 36 – Cramlington Partnership: ASD Forecast September 2022-September 2026

Cramlington Partnership															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	5	4	4	12	7	7	4	6	13	11	12	6	9	6	106
2023	4	5	5	7	14	14	8	5	8	14	14	14	5	9	125
2024	4	4	6	9	8	26	15	9	6	9	18	17	13	5	150
2025	4	4	4	12	11	15	30	16	11	7	12	21	16	13	175
2026	4	4	4	9	14	21	17	31	20	12	9	13	20	16	195

Table 37 – Cramlington Partnership: SEMH Forecast September 2022-September 2026

Cramlington Partnership															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	11	13	10	8	12	14	21	15	23	12	13	17	7	6	184
2023	9	16	17	11	9	13	16	21	16	26	12	13	10	5	193
2024	9	13	21	18	12	10	14	16	21	17	25	11	8	9	202
2025	9	13	16	22	20	12	10	14	16	24	16	24	7	6	209
2026	9	13	16	17	24	20	13	11	14	18	23	16	14	6	214

Table 38 – Cramlington Partnership: Data and information received from SENCos Autumn 2021

Cramlington Partnership	
Children in reception with EHCP	Under 5
Reception children needing a Y7 place in Special School	Under 5
Children in Y4 with EHCP	5
Y4 children needing a Y7 place in Special School	Under 5
Children in Y5 with EHCP	11
Y5 children needing a Y7 place in Special School	Under 5
Y5 children COSA applications	6
Children in Y6 with EHCP	7
Y6 children needing a Y7 place in Special School	6
Y6 children COSA applications	9



Commentary

Table 36 indicates that an increasing and significant number of students in the Cramlington Partnership will be diagnosed with ASD over the forecast period, while Table 37 suggests SEMH numbers are forecast to increase at a steady but lower rate.

Many of the secondary-age students living in the Cramlington area with SEMH and/or ASD attend the Emily Wilding Davison school, while the Gilbert Ward Academy will open in Blyth in September 2023 and will provide 80 places for secondary provision for SEMH and ASD needs serving the South East locality area.

However, given the forecasted level of growth in the South East locality in general, the Cramlington Partnership will be included when identifying whether additional provision is required in this area and discussions with the schools and academies in these partnerships will be programmed to take place at an early point in the timetable as part of the roll-out of the '3-point' assessment programme.

Haydon Bridge Partnership

Current Provision

There is currently no specialist provision located within the Haydon Bridge Partnership area, the nearest specialist provision in the county being Hexham Priory School.

SEN Forecasts

Table 39 – Haydon Bridge Partnership: ASD Forecast September 2022-September 2026

HAYDON BRIDGE PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	4	3	5	1	3	6	5	6	7	4	5	5	1	3	16
2023	2	4	6	6	1	3	9	6	6	6	5	5	4	1	18
2024	2	2	7	6	6	1	5	10	6	5	8	5	4	4	23
2025	2	2	4	7	7	6	2	6	11	5	6	7	4	4	22
2026	3	2	4	4	8	6	10	2	6	9	6	6	6	4	21

Table 40 – Haydon Bridge Partnership: SEMH Forecast September 2022-September 2026

HAYDON BRIDGE PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	5	5	6	7	9	14	5	10	11	6	6	3	2	3	94
2023	3	6	14	7	7	18	18	7	13	10	7	6	2	2	119
2024	3	4	18	16	7	15	23	24	8	11	11	6	3	1	151
2025	3	4	12	21	17	15	19	29	29	7	12	9	3	24	4
2026	4	4	12	13	22	35	19	25	36	26	8	10	5	3	223

Table 41 – Haydon Bridge Partnership: Data and information received from SENCos Autumn 2021

Haydon Bridge Partnership	
Children in reception with EHCP	Under 5
Reception children needing a Y7 place in Special School	Under 5
Children in Y4 with EHCP	8
Y4 children needing a Y7 place in Special School	Under 5
Children in Y5 with EHCP	Under 5
Y5 children needing a Y7 place in Special School	Under 5
Y5 children COSA applications	Under 5
Children in Y6 with EHCP	7
Y6 children needing a Y7 place in Special School	Under 5
Y6 children COSA applications	0



Commentary

Table 39 indicates a fairly low level of predicted growth of students diagnosed with ASD over the forecast period; however Table 40 predicts a significant increase in students diagnosed with SEMH over the same period.

Haydon Bridge Partnership is the county's most westerly partnership, with the nearest specialist provision being Hexham Priory School. In relation to identifying viable solutions for pupils with varying SEND needs living in the west of the county, it is proposed that (as for the South East of the County), provision in the partnerships of Haydon Bridge, Hexham, Prudhoe and Ponteland is considered as part of a wider solution for the West locality when identifying solutions as part of the roll-out of the 3-point programme.

This could include the development of an Alternative Provision possibly located at Haydon Bridge High School. Furthermore, the Emily Wilding Davison School, now located in Ponteland, has increased its planned pupil numbers as well as becoming co-educational and therefore now provides specialist SEMH provision within a reasonable distance of the partnerships in the west of the county.

Hexham Partnership

Current Provision

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
Hexham Priory School (academy)	2-19	ASD; MSI; SLD; PMLD; MLD; PD; SLCN; SPLD; SEMH; OTH; VI	112	120

SEN Forecasts

Table 42 – Hexham Partnership: ASD Forecast September 2022-September 2026

HEXHAM PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	2	2	5	3	9	4	2	3	9	6	8	3	8	2	67
2023	2	3	3	5	6	11	5	3	6	9	7	8	3	7	77
2024	2	3	4	4	9	7	14	5	5	6	10	7	7	2	85
2025	2	3	4	4	7	11	9	14	9	5	6	11	6	6	98
2026	2	3	4	4	8	8	14	10	26	9	5	7	9	5	114

Table 43 – Hexham Partnership: SEMH Forecast September 2022-September 2026

HEXHAM PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	1	2	7	13	4	11	6	13	8	8	7	5	1	2	87
2023	1	2	2	16	11	6	10	6	17	7	7	6	4	0	96
2024	1	2	2	5	14	15	6	12	8	16	6	6	4	2	100
2025	1	2	3	5	5	19	15	6	15	8	14	5	4	2	105
2026	1	2	3	7	5	6	18	16	8	14	7	12	4	2	106

Table 44 – Hexham Partnership: Data and information received from SENCos Autumn 2021

Hexham Partnership	
Children in reception with EHCP	2
Reception children needing a Y7 place in Special School	2
Children in Y4 with EHCP	3
Y4 children needing a Y7 place in Special School	1
Children in Y5 with EHCP	3
Y5 children needing a Y7 place in Special School	1
Y5 children COSA applications	4
Children in Y6 with EHCP	7
Y6 children needing a Y7 place in Special School	0
Y6 children COSA applications	0

Commentary

In common with the majority of the partnerships in the county, Tables 42 and 43 indicate that the number of students diagnosed with ASD and SEMH as a primary need are forecast to increase in the primary and secondary phases, although not as significantly as in some partnerships.

As stated previously, it is proposed that provision in the Hexham Partnership is considered with Haydon Bridge, Prudhoe and Ponteland as part of a wider solution for the West locality when identifying solutions as part of the roll-out of the 3-point programme.



Morpeth Partnership

Current Provision

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
Collingwood School and Media Arts College, Morpeth	2-19	ASD; SLD; MLD; PD; SLCN; SPLD; SEMH	232	260

SEN Forecasts

Table 45 – Morpeth Partnership: ASD Forecast September 2022-September 2026

MORPETH PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	6	7	7	6	12	18	5	5	11	7	3	6	4	4	100
2023	4	9	10	10	7	31	16	7	7	15	6	3	6	4	134
2024	4	6	12	14	12	17	28	25	11	10	13	6	2	6	167
2025	4	6	8	17	17	30	16	42	39	15	9	14	6	3	225
2026	5	6	8	11	20	44	27	24	66	55	13	9	13	6	306

Table 46 – Morpeth Partnership: SEMH Forecast September 2022-September 2026

MORPETH PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	3	5	7	12	9	14	16	8	15	12	12	4	4	3	125
2023	4	6	6	13	16	10	19	16	9	12	15	10	3	6	143
2024	4	6	7	10	16	16	13	18	19	7	14	13	6	4	155
2025	4	6	8	12	13	17	23	13	21	15	9	13	8	8	169
2026	4	6	8	13	15	14	24	22	15	17	18	8	7	10	182

Table 47 – Morpeth Partnership: Data and information received from SENCos Autumn 2021

Morpeth Partnership	
Children in reception with EHCP	4
Reception children needing a Y7 place in Special School	1
Children in Y4 with EHCP	5
Y4 children needing a Y7 place in Special School	3
Children in Y5 with EHCP	7
Y5 children needing a Y7 place in Special School	5
Y5 children COSA applications	8
Children in Y6 with EHCP	6
Y6 children needing a Y7 place in Special School	2
Y6 children COSA applications	4

Commentary

In common with the majority of partnerships in the county, Table 45 suggests that there will be a significant increase in the number of students being diagnosed with ASD living in the partnership over the forecast period. Table 46 predicts that SEMH will also increase steadily but at a lower rate.

Collingwood School and Media Arts College is located within the Morpeth Partnership and in common with all other special schools in the county, it has seen a significant rise in pupil numbers and is now at capacity for September 2022.

Consideration as to whether additional provision will be needed within the Morpeth Partnership will be addressed as part of the roll-out of the 3-point programme and in the light of proposed solutions for additional provision in neighbouring partnerships, particularly those in the South East of the county.



Ponteland Partnership

Current Provision

The Emily Wilding Davison School moved to its new location in Ponteland from Seghill in September 2022. From this date, the school has also increased its capacity to 100 planned places and has become a co-educational provision, with girls being enrolled from this date. There was no specialist provision within Ponteland Partnership prior to the school's relocation.

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
Emily Wilding Davison School, Ponteland	11-16	ASD; SEMH; MLD; SPLD	100	75

SEN Forecasts

Table 48 – Ponteland Partnership: ASD Forecast September 2022-September 2026

PONTELAND PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	0	0	0	0	0	1	4	2	1	0	1	4	4	1	18
2023	0	0	0	0	0	0	1	2	1	1	0	1	3	2	12
2024	0	0	0	0	0	0	0	1	1	1	1	0	1	1	7
2025	0	0	0	0	0	0	0	0	0	1	1	1	0	0	5
2026	0	0	0	0	0	0	0	0	0	0	1	1	1	0	4

Table 49 – Ponteland Partnership: SEMH Forecast September 2022-September 2026

PONTELAND PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	0	0	0	1	3	0	2	3	1	1	1	2	1	1	15
2023	0	0	0	0	1	1	0	1	2	1	1	1	1	0	9
2024	0	0	0	0	0	0	3	0	1	2	0	0	1	1	8
2025	0	0	0	0	0	0	1	1	0	1	1	0	0	0	5
2026	0	0	0	0	0	0	0	0	1	0	0	1	0	0	3

Table 41 – Haydon Bridge Partnership: Data and information received from SENCos Autumn 2021

Ponteland Partnership	
Children in reception with EHCP	5
Reception children needing a Y7 place in Special School	4
Children in Y4 with EHCP	4
Y4 children needing a Y7 place in Special School	1
Children in Y5 with EHCP	4
Y5 children needing a Y7 place in Special School	1
Y5 children COSA applications	2
Children in Y6 with EHCP	8
Y6 children needing a Y7 place in Special School	2
Y6 children COSA applications	4



Commentary

Tables 48 and 49 suggest that Ponteland Partnership will buck the trend in relation to the rest of the county within the forecast period and that the number of pupils diagnosed with ASD and SEMH needs will actually fall.

In any event, the Emily Wilding Davison School, now located in Ponteland, has increased its planned pupil numbers as well as becoming co-educational and therefore now provides specialist SEMH provision within the partnership. While the majority of its current cohort of pupils reside in the South East of the county, it is expected that overtime the majority of its pupils will in fact access the provision from the west the county, with pupils in the South East being able to access provision from the existing provision there and from the Gilbert Ward Academy when it opens in September 2023.

Prudhoe Partnership

Current Provision

There is currently no specialist provision located within the Prudhoe Partnership area.

SEN Forecasts

Table 51 – Prudhoe Partnership: ASD Forecast September 2022-September 2026

PRUDHOE PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	4	4	7	9	5	9	2	10	2	10	6	4	4	1	76
2023	5	5	5	10	10	6	8	2	10	3	9	6	3	1	84
2024	5	6	6	7	12	13	6	9	2	14	3	9	5	1	98
2025	5	6	7	9	8	15	12	6	10	3	13	3	8	2	107
2026	4	6	7	11	11	10	14	14	7	13	3	14	2	3	119

Table 52 – Prudhoe Partnership: SEMH Forecast September 2022-September 2026

PRUDHOE PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	4	4	4	2	2	5	6	8	3	11	7	1	4	3	65
2023	4	4	5	3	2	2	7	5	9	3	10	5	1	4	65
2024	4	4	6	4	3	2	3	7	6	9	3	7	4	1	61
2025	4	4	5	4	4	3	3	3	7	6	8	2	5	4	61
2026	4	4	5	4	4	4	4	3	3	7	5	6	1	5	58

Table 53 – Prudhoe Partnership: Data and information received from SENCos Autumn 2021

Prudhoe Partnership	
Children in reception with EHCP	Under 5
Reception children needing a Y7 place in Special School	Under 5
Children in Y4 with EHCP	5
Y4 children needing a Y7 place in Special School	Under 5
Children in Y5 with EHCP	7
Y5 children needing a Y7 place in Special School	Under 5
Y5 children COSA applications	Under 5
Children in Y6 with EHCP	Under 5
Y6 children needing a Y7 place in Special School	0
Y6 children COSA applications	Under 5

Commentary

Table 51 suggests that the number of students diagnosed with ASD as a primary need and who live in the Prudhoe Partnership is set to increase in both the primary and secondary phases, although not as significantly as in some partnerships. The partnership bucks the trend in relation to the majority of other partnerships in the county, with the number of pupils diagnosed with SEMH predicted to fall, albeit not very significantly.

It is proposed that provision in the Prudhoe Partnership is considered with Haydon Bridge, Hexham and Ponteland as part of a wider solution for the West locality when identifying solutions as part of the roll-out of the 3-point programme.



Seaton Valley Partnership

Current Provision

Provision	Age range	Needs met	Capacity	Number on Roll Jan 22 Census
Additional resourced provision, Seaton Sluice First School, Seaton Sluice	4-9		12	N/A
Additional resourced provision, Whytrig Middle School/Astley High School	9-18		10	

SEN Forecasts

Table 54 – Seaton Valley Partnership: ASD Forecast September 2022-September 2026

SEATON VALLEY PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	0	0	1	0	0	0	0	1	1	1	0	0	0	0	3
2023	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
2024	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2025	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2026	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Table 55 – Seaton Valley Partnership: SEMH Forecast September 2022-September 2026

SEATON VALLEY PARTNERSHIP															
Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR Totals
2022	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1
2023	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2024	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2025	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2026	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Table 56 – Seaton Valley Partnership: Data and information received from SENCos Autumn 2021

Seaton Valley Partnership	
Children in reception with EHCP	6
Reception children needing a Y7 place in Special School	Under 5
Children in Y4 with EHCP	6
Y4 children needing a Y7 place in Special School	Under 5
Children in Y5 with EHCP	Under 5
Y5 children needing a Y7 place in Special School	Under 5
Y5 children COSA applications	Under 5
Children in Y6 with EHCP	9
Y6 children needing a Y7 place in Special School	Under 5
Y6 children COSA applications	Under 5

Commentary

Tables 54 and 55 indicate that there is very little predicted need for provision for students with ASD and SEMH. Given its location in the South East of the county, it is expected that any additional provision established in the South East locality would address any need arising from the Seaton Valley Partnership.





Section 5

Ideas/models to increase Specialist School Capacity

The data presented for each school partnership demonstrates there is a growing demand to increase specialist capacity across Northumberland with high level data suggesting that there could be a further 700 special school places required by 2026 if the current pattern of increased demand continues.

The table below suggests how this increased demand could be met across Northumberland. The ideas and models are suggestions and each of these options would be discussed with each partnership of schools and relevant special school.

Partnership	Potential Model	Funding option	Approximate funding level	Timetable completion	Timetable Consultation
NORTH					
Alnwick	New build Barndale	SCIP; capital receipts; S106; Council Funding; Basic need	£8m to £12m	September 2025	March – September 2024
Berwick	Expand Grove to meet needs of pupils with SEMH and ASD, in new buildings on a new site	Berwick capital funding	£8m to £12m	September 2026	May 2022 – June 2023
Coquet	Barndale@Amble 50 place ASD SEMH all age provision in the refurbished middle school building.	Coquet capital and DfE SEND specialist place funding.	£4m to £6m	September 2024	May – November 2022
SOUTH EAST/CENTRAL					
Ashington/Hirst	Increased use of independent specialist provision to meet demand for primary places. Growth at NCEA Castle to reduce out of county placements e.g. Northern Counties/Percy Hedley	High Needs block commissioned places. Expansion on existing sites	£2m to £3m	September 2027	March – September 2026

Partnership	Potential Model	Funding option	Approximate funding level	Timetable completion	Timetable Consultation
SOUTH EAST/CENTRAL (CONTINUED)					
Blyth	Free school open 2023. Specialist mainstream based provision	DfE	£1.1m	September 2023	Complete March – September 2024
Bedlington	Expand Cleaswell Hill to meet the needs of ASD students on former Guidepost Middle School land	SCIP; capital receipts; S106; Council Funding; Basic need	£2m to £3m	September 2024	March – September 2023
Cramlington	Hillcrest to become all age provision on current site	DfE bid or SCIP; capital receipts; S106; Council Funding; Basic need	£8m to £12m	September 2025	March – September 2024
Morpeth	Temporary expansion to Hepscoth Park for primary age	School funded-temporary model	None	December 2022	March-September 2023
Seaton Valley	ARP part of Astley new school build. Number of places and admission criteria need further development. Primary specialist provision and secondary specialist provision		None as part of the main Astley/Whytrig scheme	Complete – subject to review	Complete – subject to review
PRU	Relocate PRU to Seghill and change age range to KS3 and KS4, and expand to include some medium term placements. Mix of permanent and assessment places.	Former Atkinson House building	None	October 2022	N/A
WEST					
Haydon Bridge	Primary SEMH (Lodge HB)	SCIP; capital receipts; S106; Council Funding; Basic need	£500k to £750k	September 2027	March – September 2026
Hexham	Expand on existing site using Dene Park House building	Capital receipts; S106; Council Funding; Basic need	£500k to £750k	September 2024	March – September 2023

Partnership	Potential Model	Funding option	Approximate funding level	Timetable completion	Timetable Consultation
WEST (CONTINUED)					
Ponteland	Relocation of Emily Wilding Davison schools to create additional places planned to be open Sept 2022. Phase 2 works to co-locate services and expand the vocational offer	Additional funding would be required to carry out phase 2 works.	£5.5m	School - September 2022 Co-located services – September 2023	Complete
Prudhoe	No specific need identified – watching brief.			N/A	N/A

Consultation and refining and developing options for Capacity Growth at a Local level

As set out in [Section 3](#), one part of the 3-part methodology for identifying the need for SEND capacity across the county is through the development of proposed solutions in collaboration with school partnerships, the outcomes of which will be consulted on with parents and the wider community.

In line with the timetable set out in [Section 5](#), workshops will be organised with headteachers of mainstream schools and academies and headteachers of special schools and academies – other relevant parties may also be invited to collaborate where there are specific areas to address within a partnership. Relevant and up to date data and information will be shared with partners, and it is envisaged that local information from partners working on the ground can also be shared in order to assist in forming solutions.

While potential solutions have been set out at [Section 5](#), these are a starting point and the purpose of the workshops will be to develop and refine clear, agreed proposals that all partners believe are the right solutions for that specific area of the county. Approval to consult with parents, stakeholders and the wider community will then be sought.



Section 6

Funding



In order to increase specialist capacity across Northumberland a significant amount of funding will be required to meet the predicted growth in places. The initial ideas on how this could be achieved is set out in [Section 5](#). There are a number of grant funding streams that can be utilised to support growth as well as funding already identified as part of the council Medium term financial plan as well as capital contributions from section 106 developer contributions.

NCC Funding

Capital Funding of £17m has already been identified within the council MTFP to grow capacity at a strategic level. An allocation of £1,057,675.30 in 2021/22, was approved by cabinet as the capped contribution to the free school in Blyth. The remaining funding is available to allocate to potential projects identified in [Section 5](#).

Year	Allocation
2022-23	5,942,342
2023-24	10,000,000
Total	15,942,342

DfE Specialist Capacity Growth Funding

In light of the increasing demand for specialist places nationally DfE have been providing local authorities with funding for the expansion of SEND specialist places with Northumberland allocation being as detailed opposite.

Year	Allocation
2021-22	£851,302
2022-23	£1,253,875
2023-24	£2,450,813
Total	£4,555,517

Education Infrastructure Section 106 funding

The Council's Education Infrastructure Contribution Policy was approved for implementation by Cabinet in December 2017. In 2021 the council's Cabinet approved an update to the policy specifically in order to approve an increase in the requested contribution towards SEND provision in the county to reflect the increased number (or reflecting the increased number) of young people in the County requiring specialist provision. The table below shows the current expected level of funding that could be made available to support expansion of special provision as detailed in this strategy.

Locality Area	Value
North (Berwick, Alnwick and Coquet)	£1,637,097
South East/Central (Morpeth, Ashington, NCEA, Blyth, Bede, Bedlington, Cramlington, Seaton Valley)	£1,804,356
West (Haydon Bridge, Hexham, Prudhoe, Ponteland)	£396,000
Total	£3,837,453

Other funding

Current unallocated basic need funding of £5,356,528 has been allocated to Northumberland for 2023/24, for places in September 2023. Whilst this grant is allocated to provide additional school places it isn't ring fenced so could be used to support growth in places in special schools. There could be future opportunities within the lifetime of this strategy to bid for additional central government funding as well as future years grant funding allocations from DfE.

Conclusion

This strategy is the first time Northumberland has brought together the place planning methodology used to plan for mainstream school places to predict the number of specialist places likely to be required over the next 5 years and formulate a strategy on how to engage at a local level to ensure our children and young people can have their needs met as close to their home communities as possible.

The predictions contained within this strategy do not include the potential impact of future interventions or strategies and will therefore be updated on an annual basis in order that information used to plan and grow capacity is reflective of the demands for specialist provision as the impact of interventions and strategies currently being implemented across Northumberland becomes clear.

Capital funding to support growth in places

Funding	Value
NCC Capital	£15,942,324
SEND Specialist Places Grant	£4,555,517
Section 106 funding	£3,837,453
Total	£24,335,294

The data presented for each school partnership demonstrates there is a growing demand to increase specialist capacity across Northumberland with high level data suggesting that there could be a further 700 special school places required by 2026 if the current pattern of increased demand continues. [Section 5](#) sets out ideas on how to achieve additional capacity as well as potential timescales and some very high level costs. All this detail is subject to detailed work within each of the school partnerships to ensure the affordability and sustainability of any plans for growth.

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Northumberland County Council

Family and Children's Services Overview & Scrutiny Committee

Work Programme and Monitoring Report 2022 - 2023

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TERMS OF REFERENCE

(a) To monitor, review and make recommendations about:

- Early Years
- Education and Schools
- Special education needs and disability
- Adult and Community Education
- Training and Vocational Education
- Lifelong Learning
- Youth Offending
- Social Services for Children and Young People
- Children's Health
- Teenage Sexual Health
- Looked After Children
- Safeguarding – Children
- Youth Services
- Family Services
- Children's Centres

(b) To oversee and monitor school improvement, as follows:

- (i) To receive feedback on the Ofsted inspection of schools.
- (ii) To support the work of the County Council and the progress of schools on the School Intervention and Support Programme in specified categories.
- (iii) To receive an annual report about the number of schools that have been on the School Intervention and Support Programme, the reason(s) for their inclusion, the support given by the Council and the success of this support.
- (iv) To receive an annual report on the performance of schools.

ISSUES TO BE SCHEDULED/CONSIDERED

Regular updates:

Safeguarding Activity Trends Report
Finance and Performance Six Monthly Report
Children Permanently Excluded from School/Elective Home Education
Schools performance
Joint Targeted Area Inspection

Issues to be raised:

Themed Scrutiny:

Issues to be scheduled:

School Capital Investment
Children Permanently Excluded from School/Elective Home Education
Education (Guidance about the cost of School Uniforms) Act 2021

**Northumberland County Council
Family and Children's Services Overview and Scrutiny Committee
Work Programme 2022 - 2023**

3 November 2022

Page 284	Pre-Scrutiny:- Proposals for Coquet Partnership: Outcomes of statutory consultation and final decision	This report will set out an analysis of the representations received from interested parties relating to the Council's statutory proposals for the local authority-maintained schools in the Coquet Partnership (Amble First, Amble Links, Broomhill, Red Row and Grange View CE First Schools and James Calvert Spence College). The report will also set out an analysis of the representations received in relation to a separate statutory proposal for the creation of a satellite school for Barndale House Special School in the current James Calvert Spence College building at South Avenue, Amble, which is relevant to but not dependent on the outcome of the statutory proposal for the maintained schools in Coquet Partnership.
	Pre-Scrutiny:- SEND Place Planning and Capacity Strategy	To consider the development of a 5 year SEND Capacity and Place Planning Strategy for Northumberland and to advise Cabinet of the Committee's views

1 December 2022

	School Transport Arrangements Review	To receive an update on the outcome of the school transport review as outlined to FACS in March 2022
	Northumberland Strategic Safeguarding Partnership Annual Report	To provide an overview of the work completed by the NSSP undertaken from 2020-2021.

	Care proceedings and Public Law Outline: Annual Report on progress	To present Children's Services' performance within legal proceedings in 2020/21
5 January 2023		
	<p>Pre-Scrutiny:- National Funding Formula and School Funding 2023/24</p> <p>Children who are Electively Home Educated (Summary and Guidance)</p> <p>Northumberland Strategic Safeguarding Partnership Annual Report</p>	<p>To update Cabinet regarding the National Funding Formula (NFF) and the implications for 2023/24 School Funding in Northumberland.</p> <p>The report provides information about the increase in the number of children who are electively home educated, and the multi-agency support that is in place for families.</p> <p>To provide an overview of the work completed by the NSSP undertaken from 2021-2022.</p>
February 2023		
	<p>Pre-Scrutiny:- School Admission Arrangements for Community and Voluntary Controlled Schools for 2024/2025 Academic Year</p> <p>Virtual School Headteacher Annual Report 2021-2022</p>	<p>This report informs Cabinet of the outcomes of the consultation on School Admission Arrangements for Community and Voluntary Controlled Schools for the 2024/25 Academic Year as required by the School Admissions Code 2014. Approval (determination) of these admission arrangements is also sought.</p> <p>To present the education outcomes of Northumberland's looked after children for the academic year 2021 – 2022.</p>

	Adult Learning Service Annual Report: Learning and Skills Service	The annual report for Learning and Skills Service is provided to report the performance against the Education Inspection Framework; present the work of the Careers Guidance Team and understand the role and impact of the Employability and Skills team within the wider service. The Learning and Skills Service leads a number of specialist areas and provides training for young people age 16-19, adults and apprentices across eight campuses in Northumberland as well as training in the workplace.
2 March 2023		
Page 286	<p>Director of Education Annual Report: Key Educational Outcomes (2021-2022 Academic Year)</p> <p>Finance & Performance</p> <p>Safeguarding Activity Trend</p>	<p>Annual report on the key educational outcomes of the previous academic year. The Committee will be asked to identify any further areas for scrutiny.</p> <p>To consider current performance and the budgetary position for services within the Committee's terms of reference</p> <p>To provide analysis of social work activity trends and case allocation as well as highlighting national developments regarding the Department for Education safeguarding indicators.</p>
6 April 2023		
	Annual Report of Principle Social Worker	To advise and update the Scrutiny Committee about the input and work of the Principal Social Worker in 2021/22 and an overview of the quality of practice and development needs of frontline social workers.

Northumberland County Council
Family and Children's Services Overview and Scrutiny Committee Monitoring Report 2022-2023

Ref	Date	Report	Decision	Outcome
1	5 May 2022	Informal Consultation on School Organisation for The Coquet Partnership	RESOLVED that Cabinet be advised that this Committee supported the recommendations outlined in the report.	At its meeting on 10 May, Cabinet considered the Committee's comments.
2	5 May 2022	Update On Future Arrangements for The Delivery of Early Help Locality Services in Northumberland	RESOLVED that: <ol style="list-style-type: none"> 1. The proposed changes to the current commissioning arrangements be agreed; and 2. The temporary increase in expenditure during 2022/23, 2223/24 and 2024/25, which would be covered by the additional grant funding to be received over the same period from the Supporting Families programme and the Family Hub and Start for life Programmes be noted. 	No further action
3	26 May 2022	Education Strategy Board Annual Update	RESOLVED that it be noted that the Committee had reviewed the performance of the Board in its first year and its ability to review, develop and drive the Education and Skills key priorities	To continue to receive annual updates
4	26 May 2022	The Impact of the School Improvement Team	It was unanimously RESOLVED that:	A further report to be received at a later date

Page 288			<ol style="list-style-type: none"> 1. The performance of the team and their ability to develop the quality of education in Northumberland be noted; 2. The changes to funding imposed by the DfE and the possible impact of service be noted; 3. A further report be received once it was known how the reduced funding would be accounted for; and 4. A recommendation be made to Cabinet for funding of the School Improvement Team to continue until the end of this Administration so that the team could continue to develop and offer support to schools both inside and outside of Northumberland 	
5	7 July 2022	Send Strategy Progress Report	RESOLVED that the contents of the report be noted and the Committee supported the next steps to be taken.	To receive future updates
6	7 July 2022	The Annual Report of Northumberland County Council Fostering Service 2021/22	RESOLVED that the contents of the report be noted and the performance information for the period April 2021 – March 2022 be acknowledged.	No further action
7	7 July 2022	Briefing Note - Potential Multi Academy Trust Opportunity	RESOLVED that the contents of the briefing note be noted	No further action

8	8 September 2022	Finance and Performance	RESOLVED that the current performance and how it compared to benchmarks was noted.	No further action
9	8 September 2022	Outcomes of Consultation on Proposals for the Coquet Partnership	RESOLVED that Cabinet be advised that this Committee supported the recommendations as outlined in the report.	At its meeting on 21 September, Cabinet considered the Committee's comments.
10	8 September 2022	Children's Services Annual Representations 2021- 2022	RESOLVED that the contents of the report be noted.	No further action
11	8 September 2022	Children's Social Care – Annual Self Assessment	RESOLVED that the contents of the report be noted	No further action
12	8 September 2022	OFSTED Focused Visit to Northumberland Children's Services	RESOLVED that the information be noted	No further action
13	8 September 2022	Proposal In Relation to Future Arrangements For The Youth Service	RESOLVED that :- <ol style="list-style-type: none"> 1. The activity undertaken during the review be noted; and 2. Option 1, as outlined in the report, be agreed as the way forward. 	No further action at this time
14	8 September 2022	Family Hub Development	RESOLVED that the Committee:- <ol style="list-style-type: none"> 1. Agree to proceed with the funding for the Family Hub offer; and 	No further action at this time

			2. Support the development of the governance and wider processes to underpin this as outlined in the report.	
15	8 September 2022	Support for Children and Young people with mental health needs in Northumberland	RESOLVED that the contents of the report and the future plans be noted and the support now on offer for children and young people in Northumberland be recognised.	No further action
16	6 October 2022	Regional Schools Director's Overview		No further action
17	6 October 2022	Outcomes of Consultation on Berwick Consultation	RESOLVED that Cabinet be advised that this Committee supported the recommendations as outlined in the report.	At its meeting on 11 October, Cabinet considered the Committee's comments.
18	6 October 2022	Supported Accommodation Tender	RESOLVED that Cabinet be advised that this Committee supported the recommendations outlined in the report and asked that a report be brought back to the Committee at a future date outlining the available services and anticipated placement numbers.	At its meeting on 11 October, Cabinet considered the Committee's comments. A report outlining the available services and anticipated placement numbers to be brought back in 2023
29	6 October 2022	The Northumberland Inclusion Strategy	RESOLVED that the Committee welcomed the report and noted the content and detailed strategy along with the impact that the work undertaken within Children's Services and Schools has had on the lives of Northumberland children	More detail of figures in appendix 2 to be provided
20	6 October 2022	Pegasus Centre Update	RESOLVED that the information in the report be noted.	No further action

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