



EDUCATION OBLIGATIONS

DEPOSIT LOCAL DEVELOPMENT PLAN
UP TO 2021

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YMRWYMIADAU ADDYSG

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1. INTRODUCTION

- 1.1 New housing development can place a strain on education infrastructure unless additional improved facilities are provided through planning obligations. This Supplementary Planning Guidance (SPG) identifies the circumstances in which the Council will seek contributions from developers towards the provision of school facilities and how contributions will be calculated and used.
- 1.2 The application of this SPG will be in accordance with the overarching guidance contained in Welsh Office Circular 13/97 which states that planning obligations should only be sought where they are:-
- Necessary
 - Relevant to planning
 - Directly related to the development
 - Fairly and reasonably related in scale and kind to the proposed development
 - Reasonable in all other respects.
- 1.3 This guidance supplements Countywide Policy CW26 of the Deposit Caerphilly Local Development Plan.

2. CRITERIA FOR CONTRIBUTIONS

- 2.1 The Council will seek financial contributions towards the cost of providing additional or improved primary and/or secondary school facilities from developers proposing housing developments that would generate a requirement for school places that cannot reasonably be met by existing schools because:
- (a) The capacity of the school(s) in whose catchment area(s) the new housing development is proposed would, as a result of the development, be exceeded by demand;
 - (b) There is a surplus capacity in such schools to accommodate some or all of the projected number of pupils generated from the proposed development, but this requires investment to make it fit for purpose as present classrooms are undersized;
 - (c) There is surplus capacity in such schools to accommodate some or all of the projected number of pupils generated from the proposed development, but the proposed development, taken together with other proposed or allocated housing sites will cumulatively exceed existing educational capacity; and
 - (d) There is surplus capacity in such schools at present but forward pupil projections together with the pupils generated by the proposed development show that this will be completely eroded.

In all cases the contribution requested will relate to the number of pupils expected to be generated by the proposed development.

Individual contributions may be insufficient to fully fund additional accommodation. Such monies will be banked and accumulated until such time as the provision of additional accommodation is affordable.

The only form of exempt dwelling will be:

- Bedsits/studio apartments
- 1 bedroom dwellings
- sheltered, elderly person housing and student accommodation

- 2.2 In general contributions will be sought from proposed developments (including mixed-use developments) containing the equivalent of 10 or more new houses that have the potential to increase demand on local schools beyond their existing or planned capacity and/or where existing surplus capacity is of unsatisfactory standard and would require investment to make it suitable for children generated from the proposed development.

Contribution Formula

- 2.3 Contributions towards additional or improved school facilities will be based on the following factors:

- (a) The number of qualifying dwelling units in the development (see above);
- (b) The number of school age children likely to be generated by each residential unit;
- (c) Department for Children, Schools and Families (DCSF) cost guidelines;
- (d) Any necessary land costs;
- (e) Capacity of the site/development to yield contributions and the extent and scale of contributions that may be sought for other purposes.

- 2.4 The current assessment of the number of children likely to be generated by a proposed housing development is based on demand generated by recent developments in the County Borough. Whilst each development will be assessed in its local context, the assessments typically are as follows:-

- 0.34 primary school places per residential unit;
- 0.14 secondary school places per residential unit;
- 0.03 post 16 places per residential unit;

Outline Planning Applications

- 2.5 Where an outline planning application is submitted that does not identify the proposed mix or total number of units then as a starting point for negotiation the presumption will be that the development would be all for qualifying dwellings, and that development will be at a gross density of 35 dwellings per hectare (or pro rata).

3. SCHOOL CAPACITIES

- 3.1 The Welsh Assembly Government has recently introduced revised methodologies for calculating the capacities of primary and secondary schools. The Council intends introducing these from September 2008 (primary) and September 2009 (secondary). This methodology will be used to initially calculate the overall capacities of schools and will be used to assess the criteria for contributions as in Section 2 above. These school capacity figures will be updated at least annually.
- 3.2 However, for the purposes of planning contributions the pupil capacity will be calculated net of any capacity that has been achieved through using temporary accommodation within school grounds.

4. COST GUIDELINES

Extensions/Additional Classroom Costs

- 4.1 The average cost of providing a school place will be based on:
- Department for Education and Skills (DFES) (now DCSF) Building Bulletins 98 and 99 data – to calculate the amount of space required per pupil.
 - DFES/DCSF Project Cost and Performance Data, updated in accordance with the Royal Institute of Chartered Surveyors Building Cost Information Service All Tender Index. The cost multipliers as at 2006/07 are as follows:

Sector	Cost Multipliers £
Primary (3-11)	10,372
Secondary (11-16)	15.848
Sixth Form (16-18)	17,013

When contributions are required for fit for purpose work , these will be at an amount of one third of the above values.

Formula

- 4.2 The Council will seek contributions towards necessary additional improved school facilities on the basis of the following formula:**

$$\begin{aligned} & \text{Number of relevant dwelling units x} \\ & \text{number of school age children likely to be generated per dwelling x} \\ & \text{DFES/DCSF costings (adjusted for inflation)} \\ & \text{+ any necessary land costs} \\ & \text{= financial contribution required by the Council.} \end{aligned}$$

New Schools

- 4.3 If a residential development is sufficiently large to create the need for a new school this should be located within the site together with appropriate recreation space on land transferred at no cost to the Council.
- 4.4 If the scale of the proposed development falls short of the critical threshold to deliver a school fully funded by the developer then the Council will seek to negotiate a pro rata contribution. Such a contribution will be at a higher rate than the DCSF figures, because the provision is for more than only classrooms.

5. THE COUNCIL'S OBLIGATIONS

- 5.1 When negotiating with the Council the developer can expect Agreements to address the following:
- The projects to which their contributions will be put.
 - The timing/phasing of the agreed contributions.
 - When contributions will be spent. This will normally be within 5 years of receipt.
 - The procedure by which contributions will be repaid to the developer if not spent by the Council in accordance with the Agreement.
- 5.2 It is possible that individual developer contributions may in themselves be insufficient to fund additional accommodation. In this event such monies will be banked with a view to being added to future developer contributions in the area until such time as the provision of additional accommodation is affordable.