



ALFREDSON YORK  
ASSOCIATES

**TOWN AND COUNTRY PLANNING ACT 1990**

**SECTION 78 APPEAL**

**BY**

**Accrue (Forum) 1 LLP**

PLANNING APPLICATION FOR RESIDENTIAL DEVELOPMENT

*Land at former B&Q, Stretford, Trafford*

**STATEMENT OF COMMON GROUND ON EDUCATION MATTERS BETWEEN  
JOHN POWELL LLB (Hons), OPERATIONS DIRECTOR, ALFREDSON YORK ASSOCIATES LTD.**

**AND SARAH BUTTERS, OF TRAFFORD COUNCIL**

PUBLIC INQUIRY DATE: 11<sup>th</sup> JANUARY 2022

PINS REF: APP/ Q4245/W/20/3258552

LPA REF: 100400/OUT/20

# **1. Introduction**

## **1.1. Statement of Common Ground**

1.1.1. This statement has been prepared by Alfredson York Associates and has been agreed with Trafford Council.

1.1.2. This statement has been prepared for the appeal site at the Former B&Q in Stretford for the forthcoming planning inquiry which commences on 11<sup>th</sup> January 2022.

## **1.2. Outline**

1.2.1. Section 2 of this Statement sets out matters of fact in the numbers on roll of schools that both parties accept as relevant, along with the Net Capacities and Published Admission Numbers of these schools.

1.2.2. Additionally, this section sets out the matters of fact in regard to the latest forecast numbers on roll and out of borough movement of pupils. These tables are as provided by the Council but with additional formatting provided by AYA for ease of reference.

1.2.3. Section 3 sets out matters where there is disagreement between the parties, which will also include the relevance of the tables set out in section 2.

## 2. Matters Agreed

- 2.1. The following tables set out matters of fact upon which either, or both, of the parties will seek to rely. This section does not indicate acceptance of the positions adopted with regard to this data, but indicates that the data itself is agreed between the parties.
- 2.2. The parties accept that there is no requirement for secondary school places as a result of the appeal site. The remaining tables deal with the position in the primary school sector.
- 2.3. The parties accept, for the purposes of this appeal, that the relevant schools are those identified by Trafford Council.
- 2.4. The parties accept that, for the purposes of this appeal, PAN Capacity of these schools should be used.
- 2.5. The parties accept, for the purposes of this appeal, that the costs per place used by Trafford Council are correct.
- 2.6. The parties agree, for the purposes of this appeal, that a minimum operational surplus of 5% should be maintained by the Council.
- 2.7. The table below sets out the October 2021 numbers on roll at all schools the parties believe to be relevant. It also sets out the Net Capacity of the schools at May 2021 and the current Published Admission Number of the schools. It also sets out the number of vacancies at each school and the percentage of vacant places compared to Net Capacities and to Published Admission Number capacities.

<b>Education Statement of Common Ground - School Capacities and Number on Roll</b>												Version 4
Looking at Net Capacity May 2021 and Number on Roll October 2021												
<b>Primary Schools</b>												
Within 2 Mile Statutory Walking Distance	Planning Area	School Name	Net Capacity May 2021	Published Admission Number	No. Year Groups in School	Total PAN	NOR Oct 2021	Comparing Total PAN with NOR		Comparing Net Capacity with NOR		
								No. Vacancies	% Vacancies	No. Vacancies	% Vacancies	
Yes	Stretford	Gorse Hill Primary School	420	60	7	420	327	93	22.1%	93	22.1%	
Yes	Stretford	Kings Road Primary School	630	90	7	630	598	32	5.1%	32	5.1%	
Yes	Stretford	Moss Park Infant School	172	60	3	180	180	0	0.0%	0	0.0%	
Yes	Stretford	Moss Park Junior School	233	60	4	240	256	0	0.0%	0	0.0%	
Yes	Stretford	Old Trafford Community Academy	380	60	7	420	381	39	9.3%	0	0.0%	
Yes	Stretford	Seymour Park Primary School	588	84	7	588	586	2	0.3%	2	0.3%	
Yes	Stretford	St Alphonsus RC Primary School	210	30	7	210	180	30	14.3%	30	14.3%	
Yes	Stretford	St Ann's RC Primary School	379	60	7	420	412	8	1.9%	0	0.0%	
Yes	Stretford	St Hilda's CE Primary School	315	45	7	315	228	87	27.6%	87	27.6%	
Yes	Stretford	St Matthew's CE Primary School	209	30	7	210	195	15	7.1%	14	6.7%	
Yes	Stretford	St Teresa's RC Primary School	210	30	7	210	172	38	18.1%	38	18.1%	
Yes	Stretford	Victoria Park Infant School	169	60	3	180	180	0	0.0%	0	0.0%	
Yes	Stretford	Victoria Park Junior School	199	60	4	240	247	0	0.0%	0	0.0%	
<b>Total</b>			<b>4,114</b>	-	-	<b>4,263</b>	<b>3,942</b>	<b>344</b>	<b>8.1%</b>	<b>296</b>	<b>7.2%</b>	

2.8. The parties agree that the current DfE guidance for the production of SCAP forecasts is that attached at Appendix ESCOFG01. The Council's forecasts are based on the guidance contained therein.

2.9. The table below sets out the Council's forecast numbers on roll for the relevant primary schools. This data has been formatted by AYA.

Academic Year	Primary Forecasts							Totals
	Reception	1	2	3	4	5	6	
<b>2021/22</b>	514	530	532	582	549	606	612	3925
<b>2022/23</b>	576	551	567	569	619	586	643	4111
<b>2023/24</b>	537	576	552	568	569	619	586	4007
<b>2024/25</b>	537	538	577	552	568	570	620	3962
<b>2025/26</b>	540	537	538	577	552	569	570	3883

2.10. The below table sets out for all of the schools in the first table, and for the years 2015 to 2020, the numbers of pupils obtaining a place in the first year of admissions into the school from out of catchment, and from out of Trafford. This data was provided by the Council and formatted for ease of use by AYA.

National Offer Day Statistics	2021		2020		2019		2018		2017		2016		2015	
	Primary School	Out of Catchment Area	Out of Trafford	Out of catchment area	Out of Trafford	Out of catchment area	Out of Trafford	Out of catchment area	Out of Trafford	Out of catchment area	Out of Trafford	Out of catchment area	Out of Trafford	Out of catchment area
Gorse Hill Primary School	4	1	8	1	13	0	15	0	4	0	12	1	14	0
Kings Road Primary School	28	8	26	7	27	7	25	7	17	4	29	5	28	3
Moss Park Infant School	23	0	0	0	12	0	14	0	0	0	1	0	14	0
Seymour Park Community Primary School	1	1	1	0	1	1	0	0	6	2	0	0	0	0
Victoria Park Infant School	11	0	1	0	4	0	9	1	13	1	0	0	15	0
St Matthew's CoFE Primary School	8	2	4	0	9	0	10	1	11	0	13	1	25	1
St Hilda's CoFE Primary School	Contact the School	4	Contact the School	1	Contact the School	4	Contact the School	5	Contact the School	2	Contact the School	10	Contact the School	4
St Teresa's RC Primary School	Contact the School	3	Contact the School	1	Contact the School	2	Contact the School	3	Contact the School	1	Contact the School	3	Contact the School	2
St Alphonsus RC Primary School	Contact the School	4	Contact the School	5	Contact the School	10	Contact the School	7	Contact the School	7	Contact the School	2	Contact the School	3
St Ann's RC Primary School	Contact the School	1	Contact the School	2	Contact the School	0	Contact the School	1	Contact the School	0	Contact the School	0	Contact the School	0
Old Trafford Community Academy	14	14	13	13	15	14	7	7	15	14	15	14	16	12
		<b>38</b>		<b>30</b>		<b>38</b>		<b>32</b>		<b>31</b>		<b>36</b>		<b>25</b>

### **3. Matters Not Agreed**

#### **3.1. Relevance of Tables Provided**

3.1.1. It is the Council's position that only the first table above is relevant to the calculation of the education contribution.

3.1.2. The Council does not believe that the tables showing the Council's forecast data, or the summary of out of area pupils are relevant.

3.1.3. AYA's position is that these tables are relevant to the appropriate determination of whether a contribution is necessary.

#### **3.2. Other matters in dispute**

3.2.1. Other matters in dispute include the child yield used by the Council and the weight to be given to the Council's methodology. With regard to these matters, a brief summary of the positions is set out in the following paragraphs.

3.2.2. Weight to be given to the methodology:

The Council's position is that the methodology is sound as it is based on Department for Education Guidance, has been adopted by Members, and is applied consistently.

The Appellant's position is that the methodology has not been subject to formal consultation where any part of the adopted method could be scrutinised and commented upon by interested parties, as such it carries little weight for planning purposes.

### 3.2.3. Child yield:

The Council's position is that the child yield from the development will be 3 pupils per school year group per 100 units, for those units with more than one bedroom. This gives a yield of 47 primary places.

The Appellant's position is that the above methodology does not reflect the specific mix, and uses Census data of wholly moving households to calculate a yield specific mix of 32 primary places.

### **3.3. Summary Position of Respective Arguments**

3.3.1. Attached at Appendix ESOCG02 is a spreadsheet outlining the impact of particular arguments.

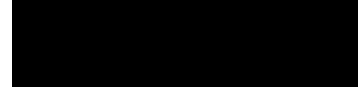
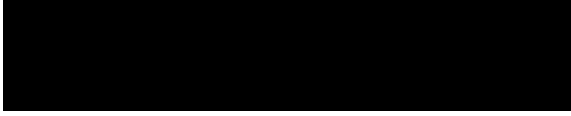
3.3.2. If the Council's position is adopted with regards to the appropriate assessment of demand for places and yield from the development, then a contribution of £739,639 would be required.

3.3.3. If the Council's position is adopted with regards to the appropriate assessment of demand for places, but with the Appellants position on the yield from the development, then a contribution of £503,584 would be required.

3.3.4. If the Appellant's position is adopted with regards to the appropriate assessment of demand for places, no matter the yield from the development, then no contribution would be required.

## 4. Signatures

The signatures below signify agreement between the respective parties



Date: 28 January 2022

Date: 28 January 2022

Name: JOHN POWELL  
of Alfredson York Associates

Name: SARAH BUTTERS

For and on behalf of the Appellants,  
Accrue (Forum) 1 LLP

For and on behalf of  
Trafford Council

## 5. Appendices

The following appendices accompany this document:

- Appendix ESOCG01 - DfE SCAP Forecasting Guidance, April 2021
- Appendix ESOCG02 - Letter from Trafford Council to the Appellant with regards surplus place range and secondary contribution with revised calculation dated 27 January 2022;
- Appendix ESOCG03 - Spreadsheet setting out a summary of the position of respective arguments.





Department  
for Education

# **School Capacity (SCAP) Survey 2021**

**Guide to forecasting pupil numbers in  
school place planning**

**April 2021**

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## Introduction

Effective pupil place planning is a fundamental element of the local authority's role as strategic commissioner of good school places. Each local authority has a legal sufficiency duty to ensure that every child has access to a school place. This is underpinned by using relevant data drawn from a wide range of sources.

Local authorities need to produce forecasts of pupil numbers so that they have up to date information on the number of places required in the school systems in the area, and so that place planning decisions can be taken accordingly. School place planning plays a crucial role in developing the local authority's strategy for capital programmes, allowing strategic decisions about investment to be made based on robust evidence.

As well as securing sufficient school places, local authorities should manage the school estate efficiently and reduce or find alternative uses for high levels of surplus capacity, to avoid detriment to schools' educational offer or financial position.

Robust forecasts are important for:

- identifying short, medium and long term capacity requirements of the school system
- planning other children's services
- agreeing investment from other services and housing developers for infrastructure projects.

Accurate and consistently derived forecasts of pupil numbers are also essential in providing the Department for Education (DfE) with information to support basic need capital allocations and other strategic decisions (for example placement of free schools).

Pupil numbers in any local authority can be influenced by a wide range of factors, for example:

- Changes in government policy, for example changes to the school leaving age
- Demographic changes within your local authority, for example rising birth rates or inward migration
- Changes in structure or school organisation, for example transforming from a three tier to a two-tier local authority
- Changes in travel to school behaviours, for example due to revised admissions policies
- Changes in numbers of pupils educated in the independent sector
- Changes in neighbouring local authorities which affect cross border flows.

This guidance provides advice to local authorities in order to ensure that forecasts produced are robust.

## **DfE reporting requirements**

Forecasts of mainstream pupil numbers must be submitted to DfE each summer as part of the annual School Capacity (SCAP) Survey.

You must be as accurate as possible in forecasting future pupil numbers when providing data to the department. Where we cannot adequately understand your methodology from your submitted forecasting methodology documentation, we may ask for additional evidence to satisfy ourselves that your forecasts are robust and well-evidenced. In some cases, this may include asking for a copy of your forecast model and underlying data.

The Office for National Statistics core forecasting model has also been created to assist local authorities with their forecasting methodologies and will be used by the department to check your assumptions.

### **Year groups**

Primary projections must cover Reception to Year 6. The DfE requires forecasts for five years ahead at primary.

Secondary projections must cover Year 7 to Year 11 (plus Years 12 and 13 where schools have sixth forms). The DfE requires forecasts for seven years ahead at secondary.

### **Planning areas**

We expect local authorities to forecast demand for school places based on “planning areas”: mutually exclusive groups of schools that represent admissions patterns and reasonable alternatives to one another. We would usually expect this to mean geographic clusters of schools within reasonable travel distance of one another. Planning areas may be reviewed by local authorities in the winter prior to each SCAP collection, with the planning area structure for each local authority being confirmed by DfE in early spring. Guidance on planning areas is available at <https://www.gov.uk/guidance/local-authority-pupil-planning-areas>.

Each local authority will have a set of primary planning areas which cover Reception to Year 6 forecasts and a set of secondary planning areas which cover Year 7 to Year 11 (or Years 12 to 14 where schools have sixth forms).

**Your forecasts should represent the pupils you expect to be educated in each planning area in each year.** As such, if a number of pupils who live in Town A routinely attend a school in Town B and you expect this to continue, they should be forecast in the Town B planning area.

Planning areas should not normally contain only schools of a certain characteristic (for example, only selective, faith or UTC schools). Proposals to create a separate pupil planning area for these schools are only approved in exceptional circumstances by the department where the local authority can provide clear evidence that it would be unreasonable to include the schools in the existing pupil planning areas. In such cases we would expect that forecast demand above the current capacity in the planning area would be redistributed to schools which are a reasonable alternative for those pupils in other planning areas.

You may have a planning area within your local authority which is particularly popular. This planning area may be bordered by planning areas in a neighbouring authority or by your own planning areas. You should not project pupil numbers higher than the capacity of school places in that area when you fully expect excess pupil numbers to be redistributed to the neighbouring planning areas with available places. If this planning area is on a local authority border, you will need to check with the neighbouring authority to ensure that they have sufficient capacity to accommodate all the projected pupils who will need to be redistributed. This is to ensure the pupil redistribution will not create a shortfall for them.

You should however only 'redistribute' pupils based on knowledge of established patterns of pupil attendance where these are expected to continue. This should not reflect any temporary redistribution of pupils which you do not expect to continue because of, for example, excessive home to school distances, transport issues or pending projects to add places in the preferred planning area.

## Assessing the accuracy of previous forecasts

Before producing a new set of forecasts, you should assess the accuracy of your previous forecasts in order to identify and correct any issues. You can do this by comparing your previous forecasts to actual pupil numbers.

The accuracy of historic forecasts can be measured as:

$$\left( \frac{\text{Forecast pupil number} - \text{actual pupil number}}{\text{Actual pupil number}} \right) \times 100$$

This will give you a figure for the percentage over forecast or under forecast. For example, if the calculation yields a figure of 3, this means there was a 3% over forecast. Similarly, a figure of -2 means a 2% under forecast.

This value will enable you to test whether inaccuracies exist. You can then investigate your forecasting methodologies in further detail to find the possible source of the inaccuracy. You should consider the accuracy of your forecasts at overall local authority level, as well as at planning area and year group levels. The latter may help you to identify any specific areas or year groups where your forecasts are less accurate, in order to target particular areas for improvement.

The starting point for assessing accuracy of pupil forecasts should be at planning area level. If you require school level forecasts, you can work back from planning area level forecasts. You should avoid starting with school level forecasts to work up to planning area forecasts. This is because trends are more volatile at school level than at planning area level, which is more likely to lead to less accurate forecasting.

You should consider how accuracy changes the further ahead you project. For example, you could consider how accurate your forecasts historically have been for five years ahead.

You should also consider changes in forecast accuracy over time as well as just looking at your last set of forecasts. This will enable you to check whether any changes you have made are making your forecasts more or less accurate so you can adjust your assumptions appropriately.

Forecasting accuracy at LA level is published each year in the School Places Scorecards: <https://www.gov.uk/government/collections/school-places-scorecards>.

# Forecasting reception pupil numbers

The following section describes a suggested method for forecasting pupils in the Reception year group.

## Population data

You will need population-based data for the number of children who live in your local authority as well as other local authorities that may contribute pupils to your reception cohort (due to students travelling into your LA to attend school). You should be mindful of the fact that your forecasts need to represent the pupils who will be educated in your schools so should include the populations of areas of other local authorities which contribute pupils to your schools.

Potential sources of population data include:

- [Office for National Statistics - Live Birth Data](#)
- GP registration data<sup>1</sup>
- [Early Years census data](#)

For the final year of reception forecasts required by DfE, you will need to produce a population estimate or use an external source of population or birth forecasts, as some of these children will not yet be born when you produce your forecasts.

Suppose you receive the following data for registrations at GP surgeries in Town A

<b>Academic Year</b>	<b>Age group</b>	<b>GP registrations</b>
<b>2017 to 2018</b>	Aged 4 as at 31 <sup>st</sup> August 2017 (birth in 2012 to 2013 academic year)	514
<b>2018 to 2019</b>	Aged 4 as at 31 <sup>st</sup> August 2018 (birth in 2013 to 2014 academic year)	516
<b>2019 to 2020</b>	Aged 4 as at 31 <sup>st</sup> August 2019 (birth in 2014 to 2015 academic year)	520

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<sup>1</sup> We are currently working with NHS Digital to obtain more consistent access to this data across local authorities. The first data reports should be available by mid-2021.



<b>Academic Year</b>	<b>Age group</b>	<b>GP registrations</b>
<b>2020 to 2021</b>	Aged 4 as at 31 <sup>st</sup> August 2020 (birth in 2015 to 2016 academic year)	536
<b>2021 to 2022</b>	Aged 4 as at 31 <sup>st</sup> August 2021 (birth in 2016 to 2017 academic year)	540
<b>2022 to 2023</b>	Aged 4 as at 31 <sup>st</sup> August 2022 (birth in 2017 to 2018 academic year)	556
<b>2023 to 2024</b>	Aged 4 as at 31 <sup>st</sup> August 2023 (birth in 2018 to 2019 academic year)	590
<b>2024 to 2025</b>	Aged 4 as at 31 <sup>st</sup> August 2024 (birth in 2019 to 2020 academic year)	612
<b>2025 to 2026</b>	Aged 4 as at 31 <sup>st</sup> August 2025 (birth in 2020 to 2021 academic year)	To be estimated

You will need to estimate an underlying population figure for those aged 4 at 31<sup>st</sup> August 2025, as some of these children will not yet be born.

One way to do this would be to use the historic information about changes in population and assume trends will continue. You should use historic data which you think will best reflect the trends carrying forward.

Calculate the difference in population size between each year, as shown below.

<b>Academic Year</b>	<b>GP registrations</b>	<b>Increase in size of population</b>
<b>2021 to 2022</b>	540	
<b>2022 to 2023</b>	556	16
<b>2023 to 2024</b>	590	24
<b>2024 to 2025</b>	612	22

Next, take a weighted average of the increases as follows:

$$\frac{(22 \times 3) + (24 \times 2) + (16 \times 1)}{6} = \frac{130}{6} = 21.67$$

We may therefore assume that the population for 2025 to 2026 will be 22 higher than the previous year, so 634.

## Calculate uptake factor

The next step is to calculate an uptake factor to determine what proportion of the children in your underlying population will require a mainstream, state-funded school place.

You may wish to base this on historical uptake. To determine the uptake factor for each year, calculate the actual number of pupils in the year group as a proportion of the total number of children of the appropriate age in your population data. For example, if there were 200 4-year-old children in the population and 164 children in your reception cohort, the uptake factor would be 82%.

Consider whether applying the historic uptake factor is accurate. You may wish to consider whether over the past few years the historic uptake factor has been stable, volatile, or shown a trend, and whether that trend is likely to continue. **Note: Numbers on roll for the 2020/21 academic year may be lower than they otherwise would have been without coronavirus (COVID-19), for various reasons. If you believe the uptake factor for September 2020 is not reflective of the trend and does not signify a long-term change in trend, then you may want to make adjustments in your calculations.**

The uptake factor is calculated as the actual number of pupils in the year group divided by the underlying population of the relevant age in the relevant year. The table below demonstrates an example of how to do this.

<b>Academic Year</b>	<b>GP registrations</b>	<b>Actual pupil numbers</b>	<b>Uptake factor</b>
<b>2017 to 2018</b>	514	430	83.7%
<b>2018 to 2019</b>	516	443	85.9%
<b>2019 to 2020</b>	520	448	86.2%
<b>2020 to 2021</b>	536	455	84.9%

In 2021 the department will publish data and guidance on estimating pupil yield from housing development. This may include a different approach for calculating early years yields for the purposes of securing developer contributions, as we recommend that requests for developer contributions reflect trends in the numbers of children living in recent housing developments who access childcare and school places year-on-year since the homes were occupied. This is not to be confused with the school uptake factor described here, for SCAP pupil forecasting.

### **Apply your chosen uptake factor**

For each year of your forecast, multiply the number of children of the appropriate age from your population data by the uptake factor you chose in the previous step.

In this example, we can see that the uptake factor is relatively stable over time, at about 85%. We can therefore apply last year's uptake factor of 84.9% to the future data, as shown below, to give final forecast figures for the reception year group.

<b>Academic Year</b>	<b>GP registrations</b>	<b>Forecast pupils</b>
<b>2021 to 2022</b>	540	458
<b>2022 to 2023</b>	556	472
<b>2023 to 2024</b>	590	501
<b>2024 to 2025</b>	612	520
<b>2025 to 2026</b>	634	538

## Forecasting pupil numbers for non-intake years

A suggested method for calculating forecast pupil numbers for year groups which are not the intake year of the school is to use a cohort progression technique.

This is based on the premise that the majority of children in a given year group at a school will progress into the next year group in the next academic year. For example, a good starting point to estimate the number of Year 5 pupils in academic year 2021 to 2022 would be to consider how many Year 4 pupils there are in academic year 2020 to 2021.

### Obtain current pupil number data

To forecast using a cohort progression technique, you will need data on the current pupil numbers in each school or planning area.

It may be more robust to base pupil number forecasts on cohort progression over a number of years. In the example below, the past four years of pupil number data for a planning area is used to calculate cohort progression ratios for each year group in each year.

**Note: Numbers on roll for the 2020/21 academic year may be lower than they otherwise would have been without coronavirus (COVID-19), for various reasons. If you believe the cohort progression ratios for 2019/20 to 2020/21 are not reflective of the trend and do not signify a long-term change in trend, then you may want to make adjustments in your calculations.**

The table below gives data for pupil numbers in the current academic year and each of the last three years.

	2017 to 2018	2018 to 2019	2019 to 2020	2020 to 2021
<b>R</b>	430	443	448	455
<b>1</b>	432	440	456	460
<b>2</b>	435	437	443	458
<b>3</b>	480	486	492	509
<b>4</b>	478	485	495	510
<b>5</b>	470	472	485	495
<b>6</b>	469	471	471	488

In order to calculate cohort progression ratios, divide each pupil number by the number of pupils who were in that “cohort” the year before. So, for example, divide the number of pupils in Year 1 in 2018 to 2019 (440) by the number of pupils in Reception in 2017 to 2018 (430), to get the ratio 1.023.

The table below shows these ratios for each year group and each year.

	<b>2017 to 2018</b>	<b>2018 to 2019</b>	<b>2019 to 2020</b>	<b>2020 to 2021</b>	<b>AVERAGE</b>	<b>WEIGHTED AVERAGE</b>	<b>TREND</b>
<b>R</b>							
<b>Year R to 1</b>		1.023	1.029	1.027	1.026	1.027	1.029
<b>Year 1 to 2</b>		1.012	1.007	1.004	1.008	1.006	1.000
<b>Year 2 to 3</b>		1.117	1.126	1.149	1.131	1.136	1.165
<b>Year 3 to 4</b>		1.010	1.019	1.037	1.022	1.026	1.050
<b>Year 4 to 5</b>		0.987	1.000	1.000	0.996	0.998	1.007
<b>Year 5 to 6</b>		1.002	0.998	1.006	1.002	1.003	1.008

The table also gives an average, weighted average<sup>2</sup> and trend<sup>3</sup> calculation for each year group. At this stage you should consider whether using the most recent ratio, an average, a weighted average or a trended figure is the most appropriate.

In this example, progression from Year 2 to Year 3 and from Year 3 to Year 4 shows a clear trend (cohort progression ratios are steadily becoming higher, indicating that more children are joining this planning area at those year groups). You should consider what might be behind this where you see this is the case. For example, this might be the result of there being a poorly performing junior school in an adjacent planning area and resulting pupil movement away from that school into this area. You should consider this before applying the trended figure whether you believe this pattern is likely to continue.

<sup>2</sup> The weighted average is calculated by adding the following rates together and dividing by 6: 2018 to 2019 rate, 2 x 2019 to 2020 rate, 3 x 2020 to 2021 rate

<sup>3</sup> The trend rate is calculated by calculating the average growth in the rate over the 3 years (RateYr3 – RateYr1 / Yrs-1) and adding this average to the latest figure

The next step is to apply the calculated cohort progression rates to your current pupil numbers. Multiply the rate you chose for Year R to Year 1 progression by the current number of pupils in Year R to get a figure for the number of Year 1 pupils expected next year. You can then apply the Year 1 to Year 2 rate to this figure to get a figure for Year 2 pupils the year after, and so on.

In the table below, the results of applying the weighted average cohort progression to most year groups, with the trended cohort progression applied to Year 3 and Year 4. The grey cells show the results of the reception forecast calculated earlier.

	<b>2017 to 2018</b>	<b>2018 to 2019</b>	<b>2019 to 2020</b>	<b>2020 to 2021</b>	<b>2021 to 2022</b>	<b>2022 to 2023</b>	<b>2023 to 2024</b>	<b>2024 to 2025</b>	<b>2025 to 2026</b>
<b>R</b>	430	443	448	455	458	472	501	520	538
<b>1</b>	432	440	456	460	467	470	485	515	534
<b>2</b>	435	437	443	458	463	470	473	488	518
<b>3</b>	480	486	492	509	534	539	548	551	568
<b>4</b>	478	485	495	510	534	560	566	575	579
<b>5</b>	470	472	485	495	509	533	559	565	574
<b>6</b>	469	471	471	488	496	510	535	560	566

### **Forecasting Year 7 or other “intake year” pupil numbers**

For other intake years, either of the methods previously described can be used. For example, you could either base forecasts on population data on 11 year-olds in your local authority, or cohort progression from Year 6 (see note on numbers on roll for 2020/21 above).

## Taking account of other factors

The process described above is intended to give a basis for forecasts and is based largely on historical trends continuing. It may be that in your local authority, you need to make some manual adjustments to account for particular situations.

### Migration

Changes to historic migration patterns as a result of **foreseeable events** should also be considered. Only include factors that have a degree of certainty and/or that indicate a long-term shift in trends, to avoid introducing volatility. Example factors to take account of could be:

- an expected increase in inward/outward migration to/from a local area, for example, as a result of the impact of **coronavirus (COVID-19)**, on people re-locating;
- a change in general migration patterns, for example, due to the impact of Britain's exit from the EU; or
- a known influx of arrivals as a result of policies such as the visa offer that has been made to British Nationals Overseas BN(O)s in Hong Kong.

### Data Sources

**Local Authorities should exercise caution in using migration data from the coronavirus (COVID-19) period for medium-long term forecasts without any adjustment to account for a pick-up in later years.**

Some of your usual data sources may have been suspended during coronavirus (COVID-19). For example, the international passenger survey (IPS) has been suspended, and EU citizens were not able to apply for national insurance numbers.

There are some datasets available to help get a sense of the short-term change in trends, including one by the Home Office on [air passenger arrivals](#) and Border Force's [immigration statistics](#). These will show the impact of coronavirus (COVID-19) and the travel restrictions, however it is not known yet when traveller numbers will pick up again nor if and when they will return to pre-coronavirus (COVID-19) levels.

With internal migration, there may be some leading indicators of movement into or out of planning areas, such as: availability of homes to buy or rent; the value of the rental market (higher rents imply more demand); or GP registrations.

## Housing

One situation where you may wish to manually adjust your forecasts is to account for inflow of pupils due to new housing being built. Housing developments can have a big impact on the demand for places in individual planning areas, or across entire local authorities.

The pupil forecasts you submit in SCAP should only include expected pupil yields from housing developments that have a high probability of being delivered within the timeframe of the forecasts. In most cases such developments will have full planning permission. If you believe a development that does not have full planning permission will proceed and will yield pupils within the forecasts timeframe, we expect that development to be present in the relevant planning authority's latest 5 year land supply. Wherever this is the case we may test the suitability of inclusion of such housing developments in SCAP forecasts by reviewing evidence on the site's deliverability and assessing delivery against previous 5 year land supply plans in the relevant planning authority.

The data you collect on housing developments is likely to come from many different sources. It should be as detailed as possible, enabling you to identify:

- Number of units
- Housing size and mix
- Location
- Completion timescale

In forecasting for housing developments, you should consider patterns of movement to these developments. You should consider if new developments are likely to be populated by families moving in from outside your local authority. If so, you should ensure that these pupils are only counted once and are not added both as part of your "housing yield" calculation and as inward migrants, where these are counted separately.

If new developments are more likely to be populated by local families moving a short distance, consider who will fill the houses they move out of. If there is a lot of local movement, consider that some of the pupils who move into the new developments might remain in their existing school places. This could mean the effect of the new development on school place need is spread over a wider area. Further data and guidance on estimating pupil yield from housing development will be published by the department later in 2021 and may provide further assistance, though the guidance is primarily to help you secure housing developer contributions.



One thing to consider is the rate at which houses are built in the area. If this is fairly steady over time (i.e. housing stock increases by x% each year) then it is likely that the pupil yield will already be captured in a migration factor or cohort progression rate. It is only if the speed of house building changes (up or down) that you may need to adjust your forecasts to take account of this. Consider the following examples:

Planning area 1 has a large new housing development, which has planning permission but has not yet started. It is on the edge of the town and the planning area has not recently experienced significant levels of housing being built. It would be reasonable in this scenario to include all the forecast yield in future forecasts (assuming of course that the local authority's yield calculation already has a factor for local children taking up residence in the housing development)

Planning area 2 has planned housing developments of around 800 units per year. This is following a period of similar levels of housing over the last five years. This means that many of the 'number on roll' figures used in the baseline forecasting already include cohort growth from housing. If the local authority was to include all pupil yield from each of the 800 units in future years, they may well be double counting, as the basic method is already accounting for this growth.

And there are lots of scenarios in between those two of course.

Where there is a demonstrable increase in the rate at which new housing is being delivered, an appropriate additional yield figure above that which is included in the forecasting models should be determined and the department's emerging data and guidance on estimating pupil yield from housing development may assist with these calculations in future.

## Office for National Statistics core forecasting model

As part of a wider review of the school capacity collection, the department commissioned the Office for National Statistics (ONS) to develop a model to forecast local authority and planning area pupil numbers. The model is based upon nationally available data such as births and school census returns. It therefore provides a 'core' forecast that does not include local factors such as changes to housing yield, or planned school changes, that may influence the forecast.

### Methodology

For primary planning areas, the model uses births data at local authority level to calculate the mean uptake ratio for a planning area over the last three years, that is the ratio of the number of pupils entering the reception year to the number of children born within the local authority five years prior. This mean uptake ratio is then used to predict reception numbers for the relevant year of the forecast. For non-intake years, a weighted average of the cohort progression ratio over the preceding three years is used. For secondary planning areas, the Year 7 intake numbers are forecast using a cohort progression method based on the ratio of Year 6 pupil numbers within the local authority to Year 7 pupil numbers within the planning area.

The core forecasting model is expected to work well for planning areas where trends are relatively 'steady state', i.e. births, internal migration, housing yields, and other factors tend to stay the same or change at a constant rate. It is expected to work less well for planning areas where a large change in trend occurs.

Currently, the core model does not provide a forecast for every planning area; around 95% of primary planning areas and 90% of secondary planning areas are included. The omission of some planning areas is due to issues such as school mergers and splits, or new provision within a planning area, that cause difficulties with the stability of the back-series data for the planning area. As the core model is refined further it is expected that it will be possible to include a greater number of planning areas.

### Core Forecasting Tool

The core forecast is provided for use in an Excel based forecasting tool. The tool uses the same Excel XML template local authorities currently complete for the school capacity forecast blade.

Local authorities can use the tool in two ways,

1. Comparing to local authority forecasts and identifying factors forecast differences:

**Primary Pupil Projections**  
 Select Planning Area: 9990001 | Select chart to display: Total

Back-series				
	16/17	17/18	18/19	19/20
R	349	364	333	299
Y1	351	354	364	341
Y2	360	358	360	369
Y3	355	363	346	355
Y4	371	358	361	349
Y5	366	378	356	357
Y6	289	357	382	350
Total	2,441	2,532	2,502	2,420

Core Projection					
	20/21	21/22	22/23	23/24	24/25
R	322	314	308	304	306
Y1	303	327	319	312	308
Y2	346	308	332	324	317
Y3	363	340	303	326	319
Y4	356	364	341	304	327
Y5	348	354	362	340	303
Y6	354	345	351	359	337
Total	2,392	2,352	2,316	2,269	2,217

LA Projection					
	19/20	20/21	21/22	22/23	23/24
R	346	351	352	339	343
Y1	339	352	356	355	343
Y2	370	344	357	359	358
Y3	366	375	349	360	362
Y4	352	371	380	352	363
Y5	367	357	376	383	356
Y6	362	372	362	379	387
Total	2,502	2,522	2,532	2,527	2,512

Difference					
	20/21	21/22	22/23	23/24	24/25
R	+29	+38	+31	+39	
Y1	+48	+29	+36	+31	
Y2	-2	+49	+27	+34	
Y3	+12	+9	+57	+36	
Y4	+15	+16	+11	+59	
Y5	+9	+22	+21	+16	
Y6	+18	+17	+28	+28	
Total	+130	+180	+211	+243	

Percentage Difference					
	20/21	21/22	22/23	23/24	24/25
R	9%	12%	10%	13%	
Y1	16%	9%	11%	10%	
Y2	-1%	16%	8%	10%	
Y3	3%	3%	19%	11%	
Y4	4%	4%	3%	19%	
Y5	3%	6%	6%	5%	
Y6	5%	5%	8%	8%	
Total	5%	8%	9%	11%	

**Factors accounting for difference**  
 Please select all that apply

- Change in housing yield
- Change in parental preference
- Change in internal migration to area
- School change
- Other
- Unknown

Please provide any further comments in the box below (max 100 words)

2. Modifying the core forecast to account for local factors:

**Primary Pupil Projections**  
 Select Planning Area: 9990001 | Select chart to display: Total

Back-series				
	16/17	17/18	18/19	19/20
R	235	227	196	232
Y1	236	235	223	198
Y2	229	231	233	214
Y3	180	237	234	236
Y4	181	182	235	238
Y5	179	178	183	235
Y6	179	181	181	181
Total	1,419	1,471	1,485	1,534

Core Projection					
	20/21	21/22	22/23	23/24	24/25
R	220	214	210	207	209
Y1	232	220	214	210	207
Y2	193	226	214	208	204
Y3	218	196	230	218	211
Y4	238	220	197	232	220
Y5	238	238	220	197	232
Y6	235	238	238	220	197
Total	1,574	1,552	1,523	1,492	1,480

Modified Projection					
	20/21	21/22	22/23	23/24	24/25
R	235	229	225	222	224
Y1	232	220	214	210	207
Y2	193	226	214	208	204
Y3	218	196	230	218	211
Y4	238	220	197	232	220
Y5	238	238	220	197	232
Y6	235	238	238	220	197
Total	1,589	1,567	1,538	1,507	1,495

**Factors accounting for difference**  
 - Enter values in the tables below to show the expected deviation from the core forecast due to different factors  
 - An increase over the core projection should be indicated by a positive value, a decrease by a negative value

Parental preference change					
	20/21	21/22	22/23	23/24	24/25
R	15	15	15	15	15
Y1					
Y2					
Y3					
Y4					
Y5					
Y6					
Total	+15	+15	+15	+15	+15

Housing yield					
	20/21	21/22	22/23	23/24	24/25
R					
Y1					
Y2					
Y3					
Y4					
Y5					
Y6					
Total	0	0	0	0	0

School changes					
	20/21	21/22	22/23	23/24	24/25
R					
Y1					
Y2					
Y3					
Y4					
Y5					
Y6					
Total	0	0	0	0	0

Other					
	20/21	21/22	22/23	23/24	24/25
R					
Y1					
Y2					
Y3					
Y4					
Y5					
Y6					
Total	0	0	0	0	0

## **Use of the forecast model**

The model was tested by running forecasts from a historic base year (2015/16) using only the data that would have been available at the time, allowing the accuracy of the model to be assessed and compared with forecasts from the SCAP return. In many cases, the SCAP forecast was more accurate than the core forecast, suggesting that local factors had been applied and had improved the forecast. Equally there were many cases where the core forecast was more accurate than the SCAP forecast, possibly due to methodology problems such as including extra factors that are already accounted for within the cohort progression ratios.

**It is intended that the core model will help within the forecasting process in the following ways:**

- **Providing a baseline figure to local authorities for comparative purposes**
- **Aid common understanding of the factors that influence the forecast for a particular planning area**
- **Potentially highlight where it may be possible to improve the methodology used for certain planning areas**
- **Help identify where forecasts may need to be reviewed**

Some of these benefits may be realised over time, as data is built up for the core forecasting model over a number of years.

## Validation

You should monitor your forecasting process rigorously to ensure it is fit for purpose and produces results that are accurate and based on sound evidence.

It is essential that forecasts are completed as you intended. Make sure that appropriate formulas are used, and that the correct data are referenced. You may wish to focus on one or two examples and work all the way through your forecast model to ensure that you can see that each step is working in the way intended and that the outcome is logical.

You should perform quality assurance checks on the input data you use for your forecasts to ensure it appears to be fit for purpose. The underlying assumptions you use in your forecasts should be realistic and evidence-based.

It is important to compare current forecasts to those of previous years to identify significant changes and ensure they make sense. For example, is an overall increase in pupil numbers the result of an increase in a particular year group, or planning area, and does this match your expectations?

You should also compare your forecasts to other data sources, for example data on admission applications for the upcoming September.

You should work closely with neighbouring local authorities, particularly where there are significant cross border flows. For example, your projections may need to take into account planned changes to school organisation in neighbouring authorities. You should check that your understanding of cross border flows matches that of your neighbours. For example, if you are forecasting significant inward migration from a neighbouring local authority, is this also reflected in their forecasts, or are pupils being counted twice?

If you are outsourcing your forecasting, you should still sense check the outputs and review the reason behind any changes to previous forecasts.



Department  
for Education

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**Date: 27 January 2022**

Dear Mr Hard,

**Re: APP/Q4245/W/20/3258552 Former B&Q Site Education Contribution  
Methodology**

Trafford Council has recently revised the Education Contribution Methodology used to calculate developer contributions, specifically the minimum operational surplus deployed within the capacity assessment. We attended a session with the Department for Education last week where the surplus issue was discussed in detail and where it was clear that the 5% figure is being used across the country and so a decision has been taken to amend our approach.

This change results in a revised education contribution calculation for the Former B&Q site which I have attached for your information, noting that a contribution is no longer sought for secondary education places.

Yours sincerely,

*K. Samples*

**Karen Samples**  
Director of Education Standards, Quality and Performance

## Trafford Education Contribution Assessment

**Development:** Former B&Q Site (100400/OUT/20)  
**School place planning area:** Stretford  
**Date:** 27 January 2022 (updated)

### Pupil Yield Calculation

Type of unit	Qty of units	Primary Yield (21%)	Secondary Yield (15%)
Studio	0	0	0
1 bed	110	0	0
2 bed	189	40	28
3 bed	33	7	5
<b>Total</b>	<b>332</b>	<b>47</b>	<b>33</b>

No. of 2 bed units reduced by 1

A pupil yield of 3 per year group per 100 homes is applied to all units of more than 1 bedroom.

## Primary School Capacity Assessment

### Trafford primary schools within 2 mile statutory walking distance from the site

Planning Area	School Name	Net Capacity May 2021	PAN	No. Year Groups in School	Total PAN	NOR Oct 2021	Comparing Total PAN to NOR	
							No. Vacancies	% Vacancies
Stretford	Gorse Hill Primary School	420	60	7	420	327	93	22.1%
Stretford	Kings Road Primary School	630	90	7	630	598	32	5.1%
Stretford	Moss Park Infant School	172	60	3	180	180	0	0.0%
Stretford	Moss Park Junior School	233	60	4	240	256	0	0.0%
Stretford	Old Trafford Community Academy	380	60	7	420	381	39	9.3%
Stretford	Seymour Park Primary School	588	84	7	588	586	2	0.3%
Stretford	St Alphonsus RC Primary School	210	30	7	210	180	30	14.3%
Stretford	St Ann's RC Primary School	379	60	7	420	412	8	1.9%
Stretford	St Hilda's CE Primary School	315	45	7	315	228	87	27.6%
Stretford	St Matthew's CE Primary School	209	30	7	210	195	15	7.1%
Stretford	St Teresa's RC Primary School	210	30	7	210	172	38	18.1%
Stretford	Victoria Park Infant School	169	60	3	180	180	0	0.0%
Stretford	Victoria Park Junior School	199	60	4	240	247	0	0.0%
		<b>4,114</b>	-	-	<b>4,263</b>	<b>3,942</b>	<b>344</b>	<b>8.1%</b>

### Primary surplus places allocated to other developments

Planning Area	Development	Reference	No. places allocated
Stretford	Manchester Waters Phase 2	93779/FUL/18	66
Stretford	No. 1 Old Trafford*	90738/FUL/17	50
Stretford	Itron, Talbot Road*	95723/FUL/18	49
Stretford	Paragon House	102507/PRO/20	4
Stretford	Bankside Manufacturing	97677/FUL/19	2
Stretford	Royal Canal Works	91948/FUL/17	7
Stretford	Insignia	88792/FUL/16	13
	<b>Total</b>		<b>191</b>

### Primary capacity assessment summary

Total surplus places	344
Allocated to other developments	186
No. remaining surplus places	158
% remaining surplus places	<b>3.7%</b>
Surplus places to be allocated	<b>0</b>

Less pupils yielded Oct 21 (\*partial completions) 5  
**Revised Total 186**



## Secondary School Capacity Assessment

### Trafford secondary schools within 3 mile statutory walking distance from the site

Planning Area	School Name	Net Capacity May 2021	PAN	No. Year Groups in School	Total PAN	NOR Oct 2021	Comparing Total PAN to NOR	
							No. Vacancies	% Vacancies
Stretford	Lostock High School	740	148	5	740	281	459	62.0%
Urmston	St Antony's RC School	661	130	5	650	650	0	0.0%
Stretford	Stretford Grammar School	686	128	5	640	766	0	0.0%
Stretford	Stretford High School	1,014	190	5	950	946	4	0.4%
		<b>3,101</b>	-	-	<b>2,980</b>	<b>2,643</b>	<b>463</b>	<b>15.5%</b>

### Secondary surplus places allocated to other developments

Planning Area	Development	Reference	No. places allocated
Stretford	Trafford Waters	85282/OUT/15	9
Stretford	Manchester Waters Phase 2	93779/FUL/18	47
Stretford	No. 1 Old Trafford	90738/FUL/17	35
Stretford	Itron, Talbot Road	95723/FUL/18	35
Stretford	Paragon House	102507/PRO/20	3
Stretford	Bankside Manufacturing	97677/FUL/19	2
Stretford	Royal Canal Works	91948/FUL/17	5
Stretford	Insignia	88792/FUL/16	9
Stretford	Kelloggs	99795/OUT/20	93
Stretford	Elsinore Road	100270/FUL/20	30
	<b>Total</b>		<b>268</b>

### Secondary capacity assessment summary

Total surplus places	463
Allocated to other developments	268
No. remaining surplus places	195
% remaining surplus places	<b>6.5%</b>
Surplus places to be allocated	<b>33</b>

## Developer Contribution Calculation

	Primary	Secondary
Calculated pupil yield from the development	47	33
Less surplus places available to be allocated	0	33
No. places for which a contribution is required	47	0
Rate per place (DfE School Places Scorecard 2019)	£15,737	£21,872
<b>Calculated Contribution</b>	<b>£739,639</b>	<b>£0</b>
<b>TOTAL CALCULATED CONTRIBUTION</b>	<b>£739,639</b>	