



WOKINGHAM
BOROUGH COUNCIL

School Specification Document

New Primary School, Matthews Green Development



Section A - Introduction

Under section 6A of the Education and Inspections Act 2006 (the ‘free school presumption’) where a local authority identifies the need to establish a new school it must, in the first instance, seek proposals to establish an academy. Wokingham Borough Council (the council) has identified the need to establish a new Primary School in Wokingham Town to open in September 2020. While the school is expected to open in 2020, this is subject to the number of children generated by ongoing housing development making the school necessary and viable. The council also wishes to explore the potential development of a new Resource Base (Social Emotional and Mental Health and Autism Spectrum Disorder are our current areas of interest) with potential sponsors.

The council prefers providers with a strong performance record, so able to demonstrate the ability to provide an outstanding education and to prove a fully inclusive school.

The number of homes both in construction in the area and completed and occupied in the last two years indicates there should be a significant increase in demand next year (2020) when we expect the school will be required. While this is our expectation we cannot know how many applicants there will be until early 2020 and the successful proposal will need to exhibit sufficient flexibility to manage effectively should the opening date change to September 2021 or later.

The new school is sited in the Matthews Green area. This is part of the “North Wokingham Strategic Development Location” (SDL) (entirely in the Wokingham Town Council area), where over 1,500 new homes are planned, with supporting infrastructure (including this new primary school). The site is within the council’s Wokingham Town West Planning Area for primary school places, which includes western parts of the Wokingham Town Council area and the adjacent Winnersh Parish Council area, around which nine schools are sited. This is the only planned new capacity across the whole Wokingham Town area in the near future so the analysis is carried out against both Wokingham Town planning areas. Housing development is well advanced on a number of sites across the Wokingham Town area, where a number of national house builders are building what are predominantly family houses.

Currently there are six primary phase schools serving the west part of the Wokingham Town Council area and a further three in Winnersh Parish. These are:

- Emmbrook Infant School (Wokingham Town)
- Emmbrook Junior School (Wokingham Town)
- Hawthorns Primary School (Wokingham Town)
- Walter Infant School (Wokingham Town)
- St Pauls Junior School (Wokingham Town)
- Windmill Primary School (Wokingham Town)

- Winnersh Primary School (Winnersh)
- Wheatfield Primary School (Winnersh)
- Bearwood Primary School (Winnersh)

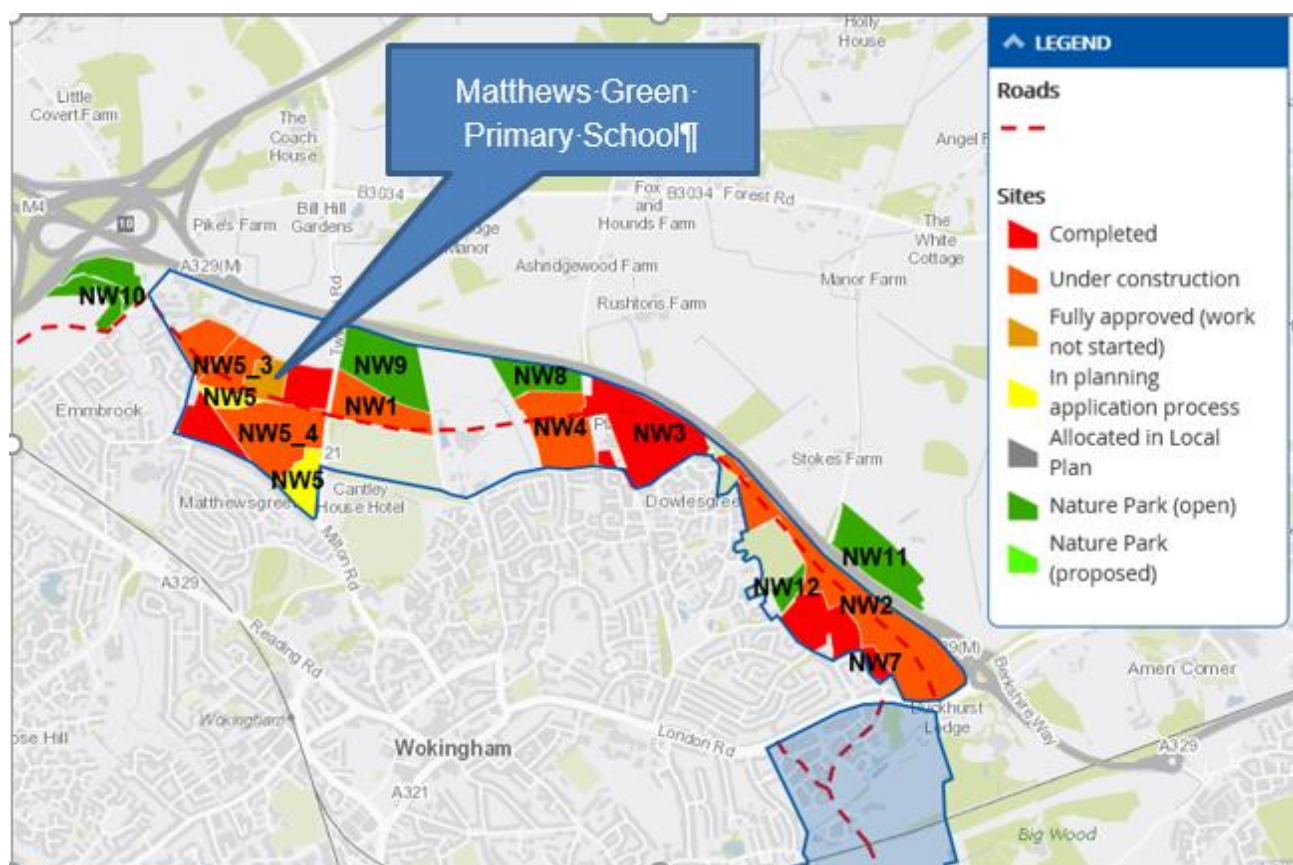
There are an addition seven primary phase schools in the Wokingham Town East area:

- All Saints CoE Primary School
- Keep Hatch Primary School
- Wescott Infants School
- Westende Junior School
- Floreat Montague Park Primary School
- Evendons Primary School
- St Teresa's RC Primary School

The council's housing trajectory for the Wokingham Town and Winnersh areas (a well-tested assessment of the future rate of housebuilding) shows how housebuilding rates are expected to remain high (an average of over 200 homes per year) until 2025/26, with house building expected to continue after that point.

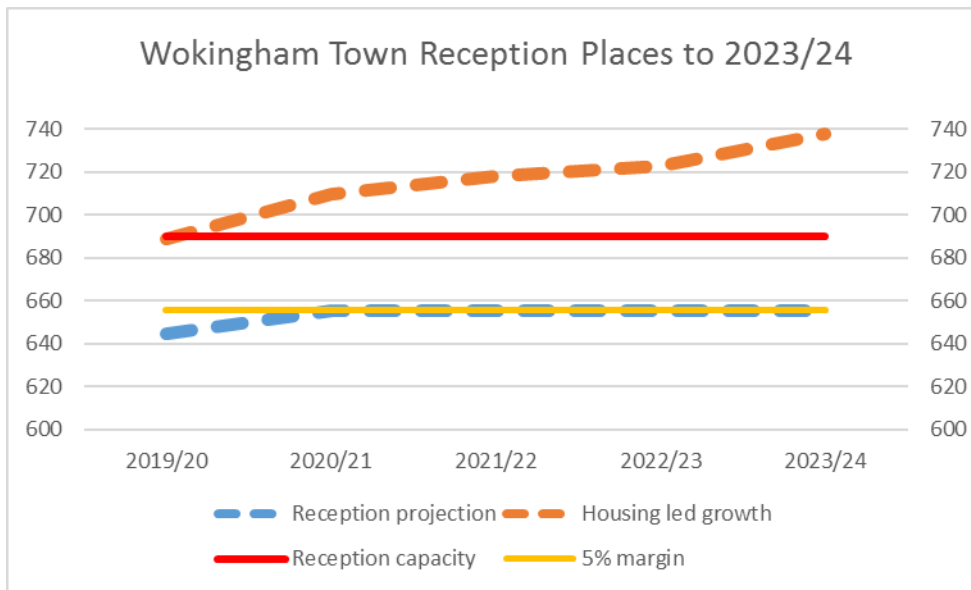
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Wokingham Town East	203	120	99	55	200	150	150
Wokingham Town West	409	159	85	53	53	55	55
Grand Total	612	279	184	108	253	205	205
Cumulative Total	612	891	1,075	1,183	1,436	1,641	1,846

North Wokingham SDL Sites (and their relationship to the Matthews Green Primary School site can be seen from the map below). Further information can be found on the council's website [here](#).



The council's roll projection for Reception places for the Wokingham Town East and West School Planning Areas (combined) with housing impacts is set out below. This model takes a conservative view of the impact of new housing, with only 1/3 of the modelled child yield from the new homes adding to projected school rolls.

Year	Reception projection	Housing led growth	Projected roll with housing impact	Reception places	Surplus Deficit (with housing growth)
2019/20	645	44	689	690	1
2020/21	655	54	710	690	-20
2021/22	655	63	718	690	-28
2022/23	655	68	723	690	-33
2023/24	655	83	738	690	-48

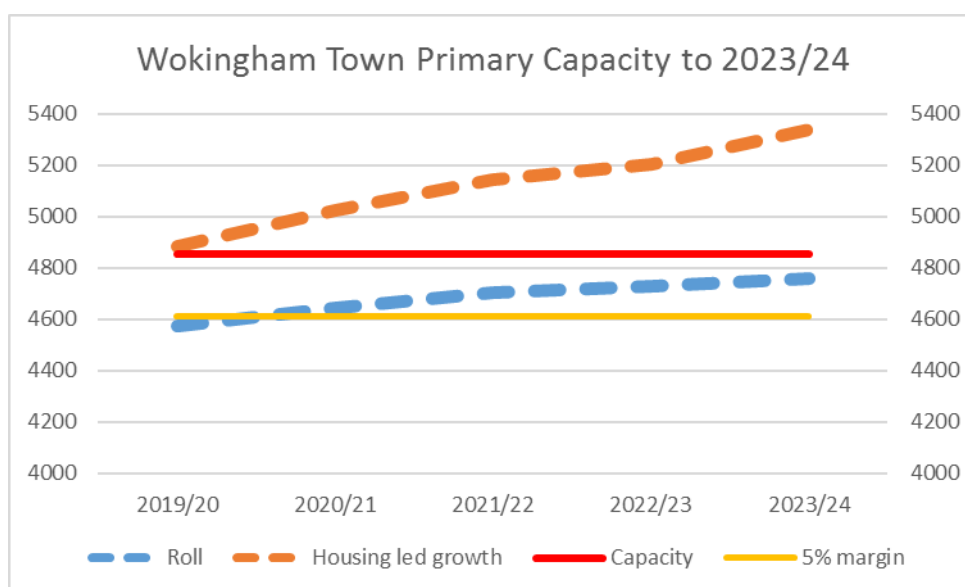


Our expectation is that new housing will lead to there being too few Reception places across the Wokingham Town area by 2020/21, making the school necessary and viable.

The chart also shows a 5% of capacity “buffer” line, showing that even without the impact of the new housing, the projected Reception roll is expected to be at the limit of the acceptable tolerance (in that there would be very little margin to allow for expected fluctuation around the projected demand), given the current capacity.

In the event that the higher roll figure is reached, and additional capacity is required, the new school premises has planning consent for an expansion to 420 places and there are contingency plans to create capacity at other schools.

The equivalent graph and table for the whole school projection and net capacity are as follows:



Year	<i>Projected Roll</i>	<i>Housing led growth</i>	Projected roll with housing impact	Capacity	Surplus Deficit (with housing growth)
2019/20	4,574	308	4,882	4,852	-30
2020/21	4,644	381	5,025	4,852	-173
2021/22	4,705	438	5,143	4,852	-291
2022/23	4,730	474	5,204	4,852	-352
2023/24	4,759	579	5,338	4,852	-486

Again the projection shows the importance of the new school for meeting housing led population growth.

Recent experience indicates that movement of families with dependent children into the borough has slowed. If this pattern continues next year, or the rate of housebuilding slows significantly, the opening of the new school may be delayed until 2021 or later.

The South Wokingham SDL is expected to be served by a further new school, once demand has risen sufficiently to make this sustainable. The second school in the South Wokingham SDL area will be to the south of the railway forming the southern boundary of the existing settlement in the Wokingham Town West area.

The premises under construction by the council comply with the national school accommodation guidance standards (BB103). The school shares the site with a community centre (management to be determined, but the council would be pleased to consider proposals for running the centre Trusts may wish to put forward). Please note that while the council welcomes applications to run the centre, these will be considered separately to the expression of interest to run the school. Please note too that the council is considering other proposals and may enter into an agreement to run the centre at any point.

SDLs background information

The council decided, nearly a decade ago, to focus housing development into a small number of larger sustainable developments, where supporting infrastructure could be delivered in a planned and co-ordinated way alongside the new community. There are four SDLs, two in the south west of the borough (South of the M4 and Arborfield Garrison SDLs) and two in the Wokingham Town area (North and South Wokingham SDLs). Each SDL has planned in primary schools and one (Arborfield Garrison) a secondary school. At the time of writing a number of new SDL schools have either opened, or are in an advanced state of preparation:

- **Arborfield Garrison SDL:** the new Bohunt Wokingham secondary school opened in 2016 and the first new site (in Arborfield Green) is in construction with a 2020 target opening date.
- **South of the M4 SDL:** the Shinfield West Primary School is ready for occupation (possible 2019 opening date)

- **South Wokingham SDL:** the new Floreat Montague Park Primary opened in 2016.
- **North Wokingham SDL:** the new Matthews Green Primary School, the subject to this school specification document, is in construction (2020 target opening date)

The council is therefore seeking proposals from appropriate sponsors to open this new Primary School in Matthews Green. This school would be deemed a free school.

Proposers should complete the Free School Presumption application form and return it to *Wokingham Borough Council, by email or letter (address elsewhere in this document) to Piers.brunning@wokingham.gov.uk by 6th May 2019.*

Background statistics

Special Education Needs and Disabilities (SEND)

The following extracts from the DfE data comparison website (<https://www.compare-school-performance.service.gov.uk/schools-by-type?step=default&table=schools®ion=872&la-name=wokingham&geographic=la&for=primary>) and the ONS National Special Education Need (SEN) statistics (<https://www.gov.uk/government/statistics/special-educational-needs-in-england-january-2018>) show that pupils in Wokingham schools generally perform better than the average for pupils in England and the incidence of SEND is lower than the average for England.

End of Key Stage 2 data 2018

School name	Type of school	% of pupils meeting expected standard	Progress score & description			% of pupils achieving at a higher standard	Average score in reading	Average score in maths
			Reading	Writing	Maths			
Wokingham		72%	Above average 0.6	Average -0.2	Above average 0.3	14%	107	106
England - state-funded schools		64%	0.0	0.0	0.0	10%	105	104
England - all schools		64%				10%	105	104

SEN Numbers

Table 14

State-funded primary, secondary and special schools ^(1,2): number of pupils with special educational needs, based on where the pupil attends school

January 2018

By region and Local Authority area in England

LA Code		Primary Schools							
		Total Pupils	Pupils with statements or EHC plans		Pupils with SEN support		Total pupils with SEN		
			Number	%	Number	%	Number	%	
ENGLAND		4,716,244	66,789	1.4	583,664	12.4	650,453	13.8	
E06000041	872 Wokingham	15,315	174	1.1	1,424	9.3	1,598	10.4	

Free School Meals:

Table 8a

State-Funded Nursery And Primary Schools (1)(2): Number Of Pupils Eligible For And Claiming Free School Meals

January 2018

By local authority area and region in England

LA Code		All pupils (3)				Pupils eligible for free school meals based on Performance Tables (4)		
ENGLAND		4,759,088	523,536	651,918	13.7	4,511,201	638,478	14.2
E06000041	872 Wokingham	15,462	602	783	5.1	14,896	779	5.2

Source: School Census

Ethnicity

Ethnicity (2018 data) (<https://www.gov.uk/government/statistics/schools-pupils-and-their-characteristics-january-2018>)

Table 9a

State-Funded Primary Schools (1)(2): Number Of Pupils By Ethnic Group (3)

January 2018

By local authority area and region in England

	White	White British	Mixed	Asian	Black	Chinese	Any Other Ethnic Group	All pupils (4)
ENGLAND	3,485,200	3,115,863	291,019	521,999	261,674	22,552	92,380	4,716,244
	74%	66%	6%	11%	6%	0%	2%	100%
Wokingham	11,099	10,005	1,117	2,191	387	167	160	15,315
	72%	65%	7%	14%	3%	1%	1%	100%

Timetable

Date	Event
6th March 2019	Expressions of interest invited via DfE website
6 th May 2019	Closing date for submissions of Expressions of Interest

Date	Event
May 2019	Evaluation by WBC (including interviews)
22 nd May 2019	Provisional interview day (all applicants should assume they will be called for interview, unless advised otherwise)
23 rd May 2019 to 28 th May 2019	Final bid evaluation and sign off. The evaluation will be a points based evaluation taking account of both the written submission and the interview).
29 th May 2019	Submission of recommendations to the DfE
June – July 2019	Decision by DfE (indicative timetable)
August 2019 to November 2019	Funding Agreement Signed (indicative timetable)

The application form can be down loaded from the current webpage.

Evaluation will be through a points based scoring matrix, based on the key criteria in this document. All applicants who are deemed to be appointable, based on the initial submission will be called for interview, and this may lead to a re-evaluation of their initial score.

The Regional School Commissioner (RSC) for North-West London and South-Central England, on behalf of the Secretary of State, will consider the council's assessments and recommendation before deciding which proposer is in the best position to take forward the new school. The RSC will inform the council and the successful proposer of its decision, following which the council will inform any unsuccessful proposers.

If you would like further information or wish to discuss your application, please contact

**Piers Brunning, Senior Specialist (People and Place), Corporate Services
Wokingham Borough Council:**

Email: piers.brunning@wokingham.gov.uk

Telephone: 0118 974 6084

By letter: Wokingham Borough Council
Shute End,
Wokingham
Berkshire
RG40 1BN

Please return your completed form by email or post to the address or email account above by **6th May 2019**.

NB: the local authority led free school presumption is a different route to the DfE's free school programme. Further information about how to establish a new school via the DfE's free school programme route can be found at:

<https://www.gov.uk/government/collections/opening-a-free-school>

Section B - The School

Opening date: September 2020 (or later, dependent on need)

Site / location (including any maps)/ postcode) See attached Appendix A

Pupil capacity: 210 plus nursery (with planning consent for an additional 210 places)

Planned initial PANs, number of forms of entry on opening and expected rate of growth: 30.

Age range and gender: the school will be co-educational and for children aged 4 to 11

Proposed admission arrangements, including catchment area if applicable:

The council is looking for partner who will run the school for the benefit of the whole community, adopting admissions arrangements that give priority to the local community, regardless of their faith or other affiliation.

It is envisaged that the school will start with a 30 number Reception class and build year on year. It may however, be necessary to open mid phase classes to meet the needs of older children arriving in the borough. These classes may need to be (or start as) mixed age classes to ensure that a sustainable class size can be achieved.

The premises have planning consent for a second form of entry, but there is no commitment from the council to build the second form of entry extension.

Although the admissions arrangements will be a matter for the provider, the council is looking for arrangements that give priority within the Wokingham Town area.

The admissions arrangements should be compliant with statutory requirements, including the statutory School Admissions Code. The school will be required to be subject to the Wokingham Fair Access Protocol.

Dependent on progress with the Funding Agreement the council hopes that the new school can be included in the co-ordinated admissions scheme for the 2020/21 year (so only one Reception place offer is made in 2020). As noted above the planned opening date is dependent on the number of families moving to the area. The council is looking for convincing proposals for managing change in the event that the opening date has to be deferred until 2021 or later as well as for the pre-opening phase in general.

Type of school: Primary with nursery

Phase of education and age range: Early Years, KS1, KS2 (4 to 11 plus nursery)

Gender (boys/girls/mixed): Mixed

Nursery provision: The school will possess a 26-place nursery unit. The council will also expect the provider to deliver pre- and after- school provision to support working parents.

Sixth form provision: No

SEN provision: Inclusive school, with an option to open a Resource Base / Specialist Provision. This would be subject to agreement with the successful Trust. The Resource base would focus on a key Wokingham need (SEMH, ASD or a combination of both) and the likely capacity is 14 children (2 per year group). The Resource Base would require additional accommodation, so could open in the current premises, dependent on the necessary planning consent having been given and a satisfactory delivery timeline agreed.

Community use / shared facilities: The school is expected to serve the wider community, and the site also incorporates a community centre.

Note that while the expression of interest for the school will be evaluated on education grounds alone, there may be an opportunity for the successful trust to run the community centre as well. The council would be interested to see proposals should this be the case.

Transport arrangements: It is expected that the majority of children attending the school will walk in, as the new development has a well-developed network of footpaths with links to other nearby communities. The school will though, be expected to develop a School Travel Plan to comply with planning conditions for the development. There is no expectation that the council will provide a home to school travel service as a matter of course.

Character/Ethos of school: The council expects providers to set out a clear vision for the school. This will include a coherent statement of the underlying principles and ethos the school will adhere to and how these will help deliver the aspirations the council has set out in this document.

Equalities impact analysis: The council is looking for a provider that can promote inclusion and support vulnerable learners, including care leavers and children in care. The school should be able to make inclusive arrangements for children with a range of Special Education Needs and Disabilities. We are particularly concerned that the school should be able to demonstrate effective strategies for meeting the needs of children with challenging behaviour, without resorting to permanent exclusion.

A formal Equalities Impact Assessment is set out later in this document.

Details of the site/ building, including details of ownership: Further detail are appended in Appendix A. The site has been passed Free Hold to the council by the developer. The council will lease the site to the school, using a standard DfE lease

template. The current expectation is though that the council will retain ownership of the car park areas, to facilitate community access outside school operating times.

Standards and partnership with the council and other local schools

The council is looking for a provider with a record of accomplishment for Outstanding or Good education and a strong record of school improvement. The curriculum should be broad, balanced, and delivered in an inspiring and exciting way. High educational standards with a resolute focus on ensuring children can reach their potential are a key requirement. At the same time, the school must show a strong moral and caring ethos, ensuring children have the care and support they need to thrive. The school must be fully inclusive.

The provider should be able to demonstrate how they will work in partnership with the council, other local schools and other agencies and organisations to support individual children and to use their expertise to raise standards in other schools. This includes working with local early years settings and secondary schools to help ensure successful transitions between educational phases.

A key partnership requirement is the need to promote the safeguarding of children. The council will look at how the providers will work with social workers, early help staff, Childrens Centres, health and police services to keep children safe.

Section C - Vision

Applicants should take account of the relevant criteria in Annex C of the free school presumption guidance.

As a minimum, please ensure you include the following:

- A strong educational vision and a curriculum delivery based on high standards of attainment for each key stage
- Plans for appropriate engagement with the local community and parents during the pre-opening period and any on-going engagement
- Excellent support facilities to meet the needs of all children, including looked after children, those with Special Educational Needs, etc
- A commitment to excellent outcomes and high quality of teaching and learning

It will be very important to demonstrate a robust and energetic strategy to inform parents about the new school and build local confidence.

Special Education Need: The council is particularly concerned that the provider should be able to support a wide range of children, including those with Social Emotional and Mental Health Difficulties (SEMH), Autism Spectrum Disorders (ASD) and challenging behaviour to remain in mainstream education. The council is keen to see proposals for the commitment to inclusivity extending to the management of a Resource Base, for these priority needs.

Standards: The council wishes to see strategies and approaches that will ensure all children fulfil their potential. A particular area of concern though is the performance of

children from disadvantaged backgrounds, including children in care, formerly in care and those eligible for Free School Meals and the council wishes to understand how the provider will minimise or eliminate the performance gap between these and other children.

Section D - Education Plan

Applicants should take account of the relevant criteria in Annex C of the free school presumption guidance.

As a minimum please ensure you include the following:

- An ambitious, broad and balanced, deliverable curriculum plan, which is consistent with the vision and pupil intake. This could include a curriculum table and pupil build up chart
- Strategies for measuring pupil performance effectively and setting challenging targets
- A staffing structure that will deliver the planned curriculum within the expected income levels; with a focus on outstanding teaching (including strategies for effective performance management). This could also include an organogram and staff build up chart
- The needs of all children are fully provided for and how the school will be fully inclusive
- Details of enrichment and extended services, for example, breakfast clubs, sports clubs, homework clubs and music/art clubs
- The school's approach to: Person Social and Health Education (PSHE) the Prevent Duty; safeguarding and welfare; and promoting fundamental British values (democracy, the rule of law, individual liberty, mutual respect and tolerance of those with different faiths and beliefs)

Section E - Capacity and Capability

Applicants should take account of the relevant criteria in Annex C of the free school presumption guidance.

As a minimum please ensure you include the following:

- The resources you would draw on and/or deploy to support the development of the new free school by the opening date
- Clear evidence that you have the range of skills and abilities necessary to set up and then run a school effectively, including: managing school finances; leadership; project management; marketing; human resources; safeguarding; and health and safety
- How the school would be organised and what the governance arrangements would look like, including a diagram of the proposed structures

Section F - Funding and Costs

The school is being built by council employed contractors to national school premises standards (BB103).

The building and site will be transferred free hold from the development consortium to the council. It will then be transferred leasehold (125 years) by the council to the Trust responsible for the school.

Details of council funding for start-up costs (including furniture fittings and equipment from capital budgets and the revenue towards pre-opening costs and diseconomy and new class opening funding while the school numbers build up) are attached as Appendix B).

Section G - Impact and Equalities Assessments

As prescribed by Section 9 of the Academies Act 2010 and Section 149 of the Equality Act 2010, the council must assess the potential impact of any new school on existing educational provision in the area. The council must also consider whether the new school would affect any groups with protected characteristics.

This assessment is attached as Appendix C.

Appendix A: Scheme details

The address is yet to be formally determined, but the approximate address is:

Matthews Green Primary School
Queens Road
Wokingham
RG41 1AL

Full details from the planning consent (ref 172331) can be seen here:

<https://planning.wokingham.gov.uk/FastWebPL/detail.asp?AltRef=172331&ApplicationNumber=172331&AddressPrefix=&Postcode=&ParishName=&WardMember=&DateReceivedStart=&DateReceivedEnd=&DateDecidedStart=&DateDecidedEnd=&AgentName=&ApplicantName=&ShowDecided=&DecisionDescription=&DateValidStart=&DateValidEnd=&Sort1=FullAddressPrefix&Sort2=DateReceived+DESC>

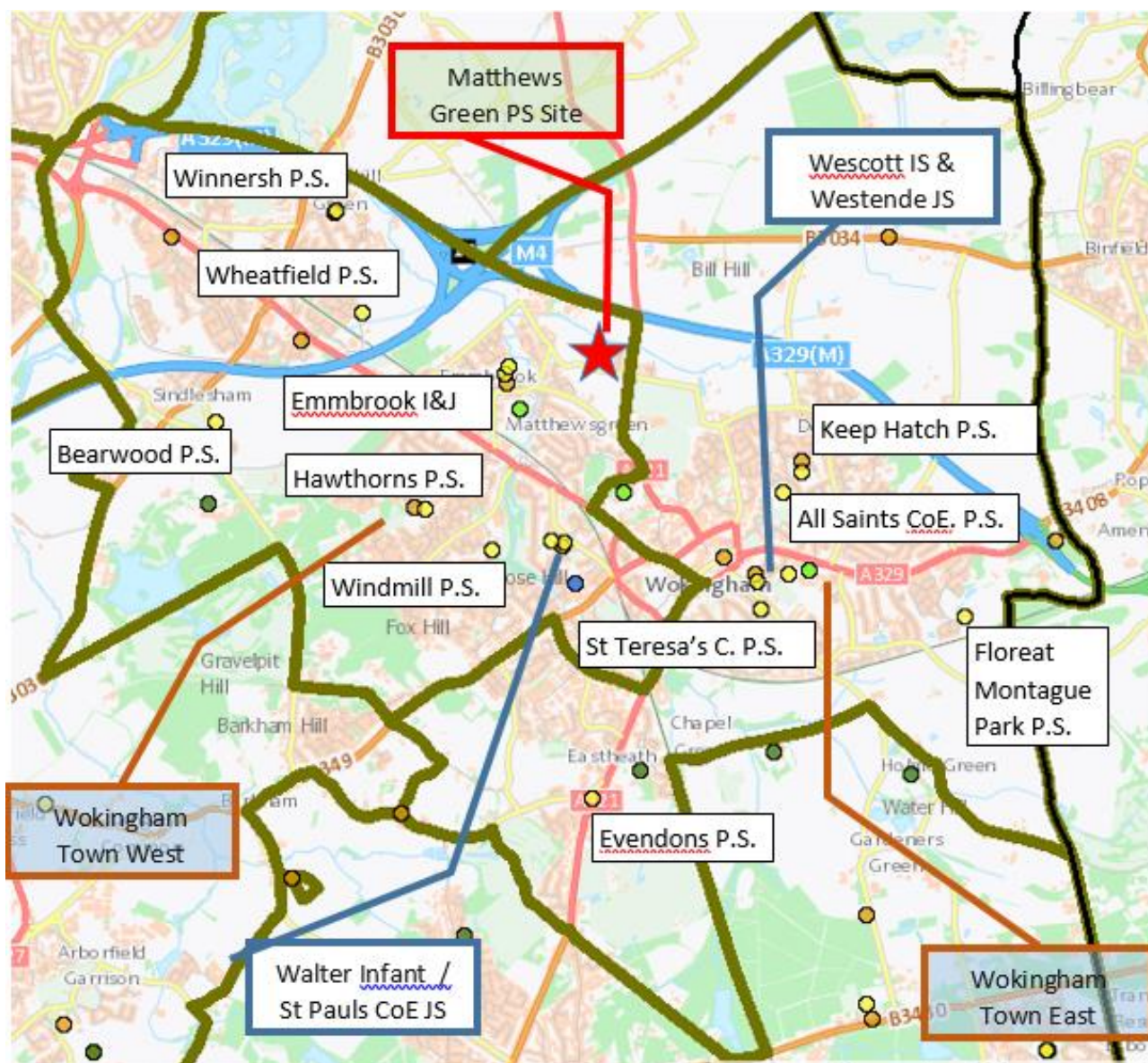
This includes floor layouts, elevations and landscaping (appended here for ease of access).



The approximate location can be found through this Google map entry:

<https://www.google.co.uk/maps/@51.4249065,-0.8450435,446m/data=!3m1!1e3>

The relationship of the site to existing schools can be seen in the following map (yellow dots mark school sites):



Wokingham Town East and West Schools

Appendix B: Funding arrangements

Capital Funding for FFE

Indicative funding schedule (actual payment schedule will be agreed around the handover arrangements for the whole building).

Allocation of funds over 8 years for Matthews Green Primary School										
FFE Budget for 1 FE + Nursery				Allocation over 7 years						
Item	Unit Cost	Final Units	Total	2020 (reception & nursery class)	2020 (R +Y1)	2021 (Y2)	2022 (Y3)	2023(Y4)	2024 (Y5)	2025 (Y6)
Classroom furniture	£4,080	7	£28,560	£4,080	£12,240	£8,160	£8,160	£8,160	£8,160	£8,160
Office(including head's)	£1,632	3	£4,896	£4,896						
Hall (sports package)	£7,650	1	£7,650	£7,650						
Hall (stage lights & sound system	£12,240	1	£12,240		£12,240					
Hall(stacking chairs)	£21	210	£4,410	£1,050	£1,890	£1,470	£1,260	£1,260	£1,260	£1,260
Dining furniture-folding tables with chairs	£612	53	£32,436	£2,448	£4,896	£5,508	£4,896	£4,896	£4,896	£4,896
Staff room	£10,200	1	£10,200	£5,100	£5,100					
Food Science	£3,570	1	£3,570	£3,570						
Group Room	£714	1	£714	£714						
Interview Room	£306	1	£306	£306						
Hygiene Room	£3,060	1	£3,060	£3,060						
Reception	£510	1	£510	£510						
Therapy/Medical Room	£1,326	1	£1,326	£1,326						
ICT Suite	£1,055	1	£1,055			£1,055				
FS outside play area equipment	£5,100	1	£5,100	£5,100						
KS1 &KS2 play area	£10,200	1	£10,200		£10,200					
Library - Books, Reading schemes & furniture	£12,240	1	£12,240	£3,240	£3,240	£3,240	£2,520			
Nursery - 26 places	£10,000	1	£10,000	£10,000						
FFE Sub- Total			£148,473	£53,050	£49,806	£19,433	£16,836	£14,316	£14,316	£14,316
Installation-15%			£22,271	£7,958	£7,471	£2,915	£2,525	£2,147	£2,147	£2,147
Contingency 10%			£17,074	£6,101	£5,728	£2,235	£1,936	£1,646	£1,646	£1,646
FFE Total			£187,818	£67,108	£63,005	£24,583	£21,298	£18,110	£18,110	£18,110
IT Set up & equipment costs	550	210	£115,500	£110,113	£21,887	£33,000	£16,500	£16,500	£16,500	£16,500
Nursery IT	200	26	£5,200	£5,200						
Total FFE &IT			£308,518	£182,421	£84,892	£57,583	£37,798	£34,610	£34,610	£34,610

Revenue Funding

Note that all funding arrangements are subject to any changes made by the DfE to the national funding arrangements for schools.

Funding for new classes will be made through the normal DfE arrangement (estimated rolls). The council will guarantee gap funding for up to 30 children for the first Reception class to open, for the duration of time this class is on the roll off the school (i.e. for 7 years).

Table A - Criteria

Please note, AWPU rates will be adjusted to reflect those apply at the point the new school commences.

Description	Criteria	Funding examples
Funding new classes and growth for pupil not on the October census or not already funded via estimated numbers (growing schools).	Primary 17/18 Age Weighted Pupil Unit (AWPU) £2,780.81 X the planned growth	<p>Examples below using 17/18 AWPU rate.</p> <p>$15 \times 2780.81 \times 7/12 = \text{£}24,332$</p> <p>$30 \times 2780.81 \times 7/12 = \text{£}48,664$</p> <p>.</p>
	** Academies and free schools additional 5 months funding	<p>As above plus</p> <p>$15 \times 2780.81 \times 5/12 = \text{£}17,380$</p> <p>$30 \times 2780.81 \times 5/12 = \text{£}34,760$</p>
Funding for new mid-phase classes (classes that open for Year groups other than the normal entry year for the school)	<p>Funding for the first 7 months as set out above (7/12 X AWPU X the planned additional roll).</p> <p>Continued payments for the gap between the funding for the actual roll for the expanded year group and funding that would be generated by 95% of the planned additional roll.</p> <p>((Planned additional roll X 95%) - Actual Additional Roll</p>	<p>$30 \times 2780.81 \times 5/12 = \text{£}34,760$</p> <p>Example where new Year 1 class had recruited 18 children over the original roll of 60 children by census day.</p> <p>$(30 \times 95\% - 18) \times 2780.81 = \text{£}29,198.51$</p>

Description	Criteria	Funding examples
	<p>on the October census day) x AWPU</p> <p>The payment will be reviewed annually as it may be necessary to agree to the creation of new mixed age classes where growth did not continue as expected and sustainable long term provision requires new mixed age class.</p>	
<p>This applies to Section 6A schools. Pre-opening support for a new primary school.</p>	<p>An initial payment then a 2nd phase payment with a Maximum level of total funding of £120k (£30K plus £90K).</p> <p>One off Lump sum to support the schools with basic setting up costs.</p>	<p>The initial funding will be £30,000 after it has been sign off from the Sec. of State.</p> <p>The balance against a pre-agreed funding release scheme between WBC and the Trust for the period up until the opening of the school.</p>
<p>This applies to Section 6 A schools. Post-opening grant.</p> <p>Diseconomy of scale (funding the gap)</p>	<p>Academies and free schools are funded on estimates therefore; they can be funded via the APT on estimated numbers.</p> <p>Sliding scale support payments until all planned year groups have opened.</p>	<p>The gap will be funded on a sliding scale bases, using a DFE model of funding non basic need schools. Please See Table B.</p>

Description	Criteria	Funding examples
Exceptional funding	Mixed age group classes.	Each case will be assessed individually.

Post opening grant

Free schools are provided with a post-opening grant by the council to reflect the additional costs in establishing a new publicly-funded school which cannot be met through the General Annual Grant (GAG). The post-opening grant provides funding in two elements as the free school grows: non-staffing resources, paid on a per-pupil basis; and a leadership grant. These titles reflect the basis on which the funding is calculated, but the grant can be spent on any legitimate purpose of the school.

The first element (resources) is paid each year that the school builds up to capacity for each new pupil *expected* to be on roll and is not revisited to reflect actual pupil numbers and is taken from the final finance plan submitted before opening. It is paid at the following rates:

- £250 for each new mainstream pupil in the primary phase (years R to 6)
- £500 for each new mainstream pupil in the secondary and 16 to 19 phases (years 7 to 13)

The second element (leadership) is paid annually based on the number of year groups that the school will ultimately have that do not yet have pupils. The amount paid to mainstream schools with pupils aged 5 to 15 each year depends on how many year groups (cohorts) are empty, and is set out in the table below.

Table B Proposed leadership grant

Empty Cohorts	6	5	4	3	2	1	Max.
	£000	£000	£000	£000	£000	£000	£000
Primary Lump sum	80.5	67.5	54.0	40.5	27.0	31.5	283.0
Secondary Lump Sum			125.0	93.5	62.5	31.0	312.0
All-through	125.0	93.5	62.5	54.0	40.5	27.0	402.5

Appendix C Impact Analysis and Equalities Impact Statement

Impact analysis

This analysis looks at the impact on schools in Wokingham's Wokingham Town East and West Planning Areas (the immediate vicinity of the intended Matthews Green School).

The Wokingham Town East and West areas have 16 primary phase schools (9 in the Town West area and 7 in the Town East area). These are shown on the map below, together with the position of the new school:



Although the council considers these to be separate planning areas, this is primarily because of the extent of the area covered, rather than because of any fundamental separation of the areas. The Matthews Green School is in the Wokingham Town West area, but close to the boundary with the Wokingham Town East area.

The council has a long-standing model to forecast the child yield of new housing developments that takes account of new home survey data (showing high levels of child yield) and ONS data derived lower, longer-term projections. Wokingham's standard roll projection (without new schools or additional housing impacts) shows a small surplus of capacity over need (35 Reception Places or 5%) by the 20/21 year (at that point there would be a projected 208 surplus places or 4% surplus).

The analysis of the impact of new housing takes a conservative view, taking account of ONS population and household projections, considering between 1/3 and 2/3 of the number of children forecast through the new housing child yield model to be additional to the standard roll projection.

The housing impact model uses survey derived new housing child yields and (lower) longer-term child yields to model the child occupancy of multi-year developments. For these purposes only 1/3 of the projected child occupants are taken as being additional to the children projected in the standard projection methodology. This is because the standard projection methodology is based on historic conversion rates (conversion of births by ward to Reception numbers and of younger age groups into older age groups), that in effect are partly driven by historic new housing led migration. What is unusual at the moment is that housebuilding rates are markedly higher than was seen in earlier years. Given that most new homes are family homes, the reasonable expectation is that they will generate additional children (additional to the standard roll projection). The 1/3 discount was derived after comparison of the ONS 2014 base single year of age projection (which, through the ONS Household Projection, creates the need for 2/3 of the homes required under national planning policy), the standard roll projection and the new home occupancy projection.

Neighbourhood: Wokingham Town East and West combined

		KS1			KS2				
January		Year R*	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Actual	2017	630	650	622	627	558	592	543	4,222
Projections	2018	587	645	659	638	641	559	598	4,326
	2019	644	600	654	675	654	642	564	4,431
	2020	645	660	608	669	691	655	647	4,574
	2021	655	660	669	622	686	692	659	4,644
	2022	655	672	669	686	638	688	697	4,705
	2023	655	672	681	687	703	640	692	4,730
	2024	655	672	681	699	704	705	643	4,759

AN	AN + or-	Variance		NC	NC +or-	Var
690	0	-		4852	0	630
690	0	103		4852	0	526
690	0	46		4852	0	421
690	0	45		4852	0	278
690	0	35		4852	0	208
690	0	35		4852	0	147
690	0	35		4852	0	122
690	0	35		4852	0	93

The case for the school is largely driven by the large-scale residential expansion in the immediate vicinity of the school.

New home numbers: planned build out rate

Note that 2017/18 homes numbers are broadly equivalent to 2018/19 totals, but as this is for the current financial year the immediate impact on school rolls is already known.

	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Wokingham Town East	203	120	99	55	200	150	150
Wokingham Town West	409	159	85	53	53	55	55
Annual Total	612	279	184	108	253	205	205
Cumulative Total	612	891	1,075	1,183	1,436	1,641	1,846

This leads to the following analysis:

	Current Capacity		Standard Projection		Housing led growth		Reception Places			Full capacity		
Year	Reception places	Capacity	Reception projection	Projected Roll	Reception	Whole school	Demand with housing impact	Surplus Deficit (with housing growth)	%ge Surplus (+) or Deficit (-)	Projected roll with housing impact	Surplus Deficit (with housing growth)	%ge Surplus (+) or Deficit (-)
2019/20	690	4,852	645	4,574	44	308	689	1	0%	4,882	-30	-1%
2020/21	690	4,852	655	4,644	54	381	710	- 20	-3%	5,025	-173	-4%
2021/22	690	4,852	655	4,705	63	438	718	- 28	-4%	5,143	-291	-6%
2022/23	690	4,852	655	4,730	68	474	723	- 33	-5%	5,204	-352	-7%
2023/24	690	4,852	655	4,759	83	579	738	- 48	-7%	5,338	-486	-10%

This point to there being a deficit of places by 2020/21 (increasing after that point).

It should be noted though that there are a number of issues that may lead to lower future rolls:

- The projection depends on the ongoing buoyancy of the housing market. If the delivery of new homes slows, the number of children “generated” will fall.
- The projection takes account of historic family movements into the borough (Wokingham has always been an area that young families move to). If the number of children moving into homes in established areas falls, the number of children requiring Reception places will fall.
- The projection depends on child occupancy of new homes reflecting historic survey data. If the child yield should fall, the number of children generated will fall.
- There is considerable uncertainty about the level of international migration.

Therefore, the council intends to keep an ongoing watch on factors that will affect future demand with the intention of establishing the best opening date for the school. This may mean that the opening moves from 2020 to 2021 or later. The final decision would be expected to be taken in early March 2020, in the light of applications received by that date.

Equalities Impact Assessment

Appendix C: Equality Impact Assessment (EqIA) for the Matthews Green Primary School

Date: 06/02/2019	Scheduled refresh date: N/A	Version: V1
Service: Corporate Services	Completed by: Piers Brunning	Signed-off by: Click or tap here to enter text.
What key decision activity are you completing this EqIA for?		
Policy/Strategy <input type="checkbox"/>	Decision <input checked="" type="checkbox"/>	Service <input type="checkbox"/>

STAGE 1: INITIAL SCREENING		
1.1: Did you answer yes to any question in the EqIA Criteria Checklist? <i>(Source: EqIA Criteria Checklist, Appendix B, EqIA Guidance)</i>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
<p><i>If yes, please complete the template.</i></p> <p><i>If no, please provide an explanation below of why an EqIA is not required for the policy, function or service work you are implementing.</i></p> <p>Click or tap here to enter text.</p>		

1.2: What are the aims and objectives of the policy/strategy, decision or service?

To ensure there are sufficient primary school places across the Wokingham Borough area.

To ensure that places are available within walking distance of home.

To create facilities (such as on site sports facilities) that benefit the wider community.

To ensure that schools are run by partners who can secure the best futures for Wokingham children.

To reduce congestion.

STAGE 2: SCOPE AND DEFINE

2.1: Who are the main beneficiaries of the policy, decision or service?

List the groups the work is targeted or aimed at.

Children aged 3 to 11

Parents and carers of children aged 3 to 11

Children aged 3 to 11 with Physical Disabilities

Road users

2.2: Who has been involved in the creation of the policy, decision or service? Who will it impact?

E.g. focus groups, interviews, staff, service users. Also identify any groups, in addition to the main beneficiaries, the work may impact

The Primary School Places Strategy that requires this school was agreed by Wokingham's Executive on 28 June 2018.

Community facilities provided with school facilities benefit the wider community.
Green and Community infrastructure teams are involved in the development of proposals.

STAGE 3: INFORMATION GATHERING/EVIDENCE

3.1: What Secondary Data did you use in the creation of this EqIA?

Secondary data is data collected by someone other than the user. Common sources of secondary data for social science include censuses, organizational records and data collected through qualitative methodologies or qualitative research)

Office of National Statistics Projections for Wokingham

School Census data

Housing Trajectory data (future housing projections)

Child Yield Survey data from 2010

School Roll Projections

Live birth data from the NHS and the ONS

House construction data from the DCLG

3.2: What Primary data did you use in the creation of this EqIA?

Primary data is data collected by the investigator conducting the research, for example data collected through consultation, questionnaires or focus groups

None

STAGE 4: ASSESSING THE IMPACT

Please complete the impact assessment table below by identifying any function or service that is likely to touch on any of the 3 main duties of the Equality Act 2010, then select the protected characteristic that maybe effected by the decision.

STAGE 5: ADDRESSING THE ISSUES

Once you have identified the impacts, please consider ways to tackle each of the negative impacts identified in order to mitigate them by completing the mitigation section of the table.

4 & 5: IMPACT ASSESSMENT AND ACTION PLAN

Consider the 3 main duties set out in the Equality Act 2010

- 1. Eliminate discrimination, harassment, victimisation and other conduct that is prohibited under the Act**
- 2. Advance equality of opportunity between persons who share relevant protected characteristics and persons who do not share it**
- 3. Foster good relations between persons who share a relevant protected characteristic and persons who do not share it**

Protected Characteristics	IMPACT ASSESSMENT			MITIGATION			
	(+ve/ 0 / - ve)	Nature/Explanation	Main Duty (1-3)	Action required	Who is responsible?	By when?	Expected outcome
Race	+	Local school places are important to families from deprived	2	Having local school places helps families from deprived backgrounds (and some BME communities are over	Strategy and Commissioning	In line with opening schedule	That all communities will be able to access local school places, to enable higher rates of school

Protected Characteristics	IMPACT ASSESSMENT			MITIGATION			
	(+ve/ 0 / - ve)	Nature/Explanation	Main Duty (1-3)	Action required	Who is responsible?	By when?	Expected outcome
		backgrounds (BME families are over represented in deprived communities) to maintain high levels of school attendance, and to increase opportunities to secure paid employment.		represented in various categories of deprivation) maintain high levels of school attendance and maximises their ability to secure work.		of new provision	attendance to ensure children can take advantage of out of hours provision (such as after school childcare).
Disability	+	Older school premises are not inclusive, particularly for children with physical disabilities (e.g. having internal changes in level). Children with disabilities will have greater difficulties	2	New premises will be inclusive, with ramps and level access, where appropriate. A higher proportion of children with SEND will be able to walk to school. To ensure that school sponsors have a positive attitude and effective approach to managing inclusion.	Shared Building Services Strategy and Commissioning Education	In line with opening schedule of new provision	That a higher proportion of children with SEND will be educated in mainstream schools.

Protected Characteristics	IMPACT ASSESSMENT			MITIGATION			
	(+ve/ 0 / - ve)	Nature/Explanation	Main Duty (1-3)	Action required	Who is responsible?	By when?	Expected outcome
		managing the home to school journey.					
Gender	0	Children needing schools places will be of equally balanced genders	2	Subject to ensuring that all new provision is co-educational, no further action is required.	Strategy and Commissioning Education	In line with opening schedule of new provision	That provision will be of equal value to children of both genders.
Age	0	Primary schools, by their nature, serve children of a specific age		No further action required.	N/A	N/A	N/A
Sexual orientation	0	The availability of local primary school places has no significant special impact on individuals because of their sexual orientation.		To ensure that school sponsors have a positive attitude and effective approach to managing inclusion.	Strategy and Commissioning Education	In line with opening schedule of new provision	That children from all backgrounds will be equally supported to thrive in schools.

Protected Characteristics	IMPACT ASSESSMENT			MITIGATION			
	(+ve/ 0 / - ve)	Nature/Explanation	Main Duty (1-3)	Action required	Who is responsible?	By when?	Expected outcome
Religion/ belief	+	New school provision creates the opportunity to re-balance education provision to better match community aspirations and ensure parents seeking a particular type of education, based on religion or belief to find this closer to home.		<p>To consider the balance of school types as one of the factors when selecting school providers.</p> <p>To ensure that school sponsors have a positive attitude and effective approach to managing inclusion.</p>	Strategy and Commissioning Education	In line with opening schedule of new provision	That children from all backgrounds will be equally supported to thrive in schools.
Gender Reassignment	0	The availability of local primary school places has no significant special impact on individuals because of their re-assigned gender.		To ensure that school sponsors have a positive attitude and effective approach to managing inclusion.	Strategy and Commissioning Education	In line with opening schedule of new provision	That children from all backgrounds will be equally supported to thrive in schools.

Protected Characteristics	IMPACT ASSESSMENT			MITIGATION			
	(+ve/ 0 / - ve)	Nature/Explanation	Main Duty (1-3)	Action required	Who is responsible?	By when?	Expected outcome
Pregnancy and maternity	+	<p>Pregnant mothers of children attending school may have limited mobility and benefit from local provision.</p> <p>Pregnant staff may be able to work more effectively and for longer where premises are accessible,</p>	2	To ensure that new provision is designed to be accessible to both children and staff with disabilities and impaired movement.	<p>Shared Building Services</p> <p>Strategy and Commissioning Education</p>	In line with opening schedule of new provision	That pregnant women are able to access school facilities, both as mothers of children on roll and as staff members.

STAGE 6: REVIEW & SCRUTINY

6.1: Has your EqlA been considered at your service's Management Team for discussion?

Yes ☐

No ☒

If yes, date of meeting: [Click or tap to enter a date.](#)

6.2: After discussion with Management Teams, list comments, criticisms or alternative approaches suggested regarding the impacts and actions of the policy/strategy, decision or service.

What changes, if any, have been taken following discussion with your service Management Team?

N/A

STAGE 7: PUBLICATION AND COMMUNICATION OF RESULTS

7.1: How will the assessment, consultation and outcomes be published and communicated?

Through publication of this EqlA on the WBC website, with the strategy.

STAGE 8: EMBEDDING ACTIONS INTO DELIVERY PLANS

8.1: Has your delivery plan been updated to incorporate the activities identified in the EqlA to mitigate any negative impacts that you have discovered?

These could be service, equality, project or other delivery plans.

Note: If you did not have sufficient data to complete a thorough impact assessment, then an action should be incorporated to collect this information in the future.

The benefits stem from the planning of the facilities (largely complete where new schools are required and new premises are required to be accessible to accessible), through the location of the new provision (and new schools are planned to be linked by level safe walking routes to new and existing communities) and through the recommendations the council makes regarding new sponsors (this is to be completed as the selection process starts this summer / autumn).