

Merton Sites and Policies and Policies Plan (the plan) Public Examination

Main matter 2: Relationship to Core Strategy

- Q2 . Relevant policies in the London Borough of Merton Core Planning Strategy (the Core Strategy) require the provision of a minimum of 4,800 houses in the Borough up to 2026 (Policy CS 9), support the provision and improvement of infrastructure (Policy CS 11), encourage the increased provision of the overall number and range of jobs (Policy CS 12), seek to protect and enhance the borough's public and private open space network (Policy CS 13) and seek to ensure that development is designed to respect, reinforce and enhance the local character of the area (Policy CS 14). To what extent does the Plan assist in achieving these aims?**
- 2.1 The Plan assists in achieving the aims of Merton's adopted Core Planning Strategy (**SP 3.2**) by providing the details under which applications for planning permission can be assessed in order to meet the development and infrastructure requirements set out in Merton's Core Planning Strategy (and in the London Plan). These details include the development management policies, site allocations and land designations via the Policies Map.
- 2.2 All the documents making up Merton's Local Plan (Core Planning Strategy **SP3.2**, South London Waste Plan **SP5.38** and Sites and Policies Plan **SP4.3**) have been positively prepared. The council has worked with the Mayor of London and infrastructure providers (including housebuilders, the NHS, utilities companies and others) to meet local needs. In particular, the Mayor of London identifies London's needs for housing, waste apportionment, transport infrastructure and other strategic development and infrastructure needs. These needs and how they will be met are identified in Merton's Core Planning Strategy, or in the case of waste apportionment, in the South London Waste Plan.
- 2.3 Merton's Core Planning Strategy (**SP 3.2**) Table 28.1 links each Core Planning Strategic objective to a CS policy, then to indicators and targets. Performance against these targets are monitored in Merton's annual Authority's Monitoring Report (planning) - this demonstrates how the council monitors performance against these targets, and thus whether or not Merton's needs are being met.
- 2.4 In SP4.3, page 186-189 the council is proposing to add an additional appendix. This sets out comprehensively which development management policies in Merton's *Sites and Policies Plan* help to deliver Merton's Core Planning Strategy objectives. This is included as appendix 1. to this statement. Moreover, in the justification text to each policy in **SP4.1** and **SP4.3**, Merton explains how the proposed policy in the Sites and Policies Plan, and consequently proposed designations and allocations, will contribute to the strategic policies as set out in Merton's Core Planning Strategy (**SP 3.2**).

- 2.5 We further explain between paragraphs below how the council's proposed policies, designations and allocations contributes to the delivery of the strategic policies set out in Merton Core Planning Strategy in particular focusing on those of concern to the Examiner. This additional information should be considered, in addition to the evidence already submitted in the following key documents **SP4.7, SP4.8, SP4.9, SP4.10, SP 4.11, SP4.22** and **SP4.23**.

How the Sites and Policies Plan will help to deliver the minimum provision of 4,800 houses in the Borough up to 2026:

- 2.6 *Policy CS9: Housing provision* supports the creation of socially mixed sustainable neighbourhoods, requires the provision of a minimum of 4,800 homes per annum, no net loss of residential units or affordable homes. **SP4.1** supports Policy CS9 in the following ways.
- 2.7 It provides guidance for landowners, developers, local residents, decision-makers and others on the: housing mix (DM H2 *housing mix*), support for affordable housing (DM H3) and support for homes for different sections of Merton's communities, including the more vulnerable required in Merton (DM H1: *supported care housing for vulnerable people or secure residential institutions for people as part of the criminal justice system*; DM H5 *Student housing, other housing with shared facilities and bedsits*).
- 2.8 It allocates sites, in whole or in part, for residential development. Of the 46 sites proposed for allocation in SP4.3, the allocation of 44 propose to support some residential development. Using conservative assumptions, these sites are expected for to contribute approximately 1,400 homes or about a third of the total towards the delivery of a minimum of 4,800 over the Core Planning Strategy period. As Merton is generally a borough of small sites (with over 85% of its planning applications over the last 11 years being for less than 10 units, accounting for approximately 50% of the homes built), it is considered that the site allocations make a significant contribution to the certainty of housing delivery.
- 2.9 Merton's Authority's Monitoring Report 2012-13 (**SP5.64** – attached as appendix 2 to this statement), particularly chapter 4 on housing (**SP5.65**) demonstrates that Merton is on track to meet its housing target for the next five years (see housing trajectory on page 29. Chapter 4, page 31 onwards also demonstrates the delivery risk assessment, contingencies and management actions that Merton would consider should housing delivery reduce over the lifetime of the plan.
- 2.10 Along with other London boroughs, Merton has been working with the Mayor of London on the Strategic Housing Land Availability Assessment which will inform London's objectively assessed need for new homes. The draft London Plan 2014 will publish the proposed housing targets for London and for Merton
- 2.11 At the time of writing (December 2013) the draft London Plan has not yet been published. However, page 24 of Merton's Authority's Monitoring Report 2012-13

(SP5.64) demonstrates how Merton has estimated what its housing needs could be, based on inputs to the London-wide SHLAA. Figure 4.12 “*Five year supply*” demonstrates how Merton is projected to meet its current annual target of 320 homes per year and is also projected to meet its future (estimated) annual target (likely to be around 420 new homes) for the next five years.

How the Sites and Policies Plan will help support the provision and improvement of infrastructure (policy CS11):

- 2.12 Policy CS 11 *Infrastructure* supports the provision of infrastructure in Merton for people now and in the future that live, work or visit the borough. This policy highlights the necessity of providing such infrastructure alongside significant development or where there is an area of deficiency. Such infrastructure includes healthcare, education, social, recreational and community facilities, emergency services and utilities. (Transport, waste management and flood risk mitigation infrastructure are dealt with elsewhere in the Core Planning Strategy).
- 2.13 Merton’s Core Planning Strategy (**SP 3.2**) Table 28.2 summarises the infrastructure needed to support the existing population and new development in Merton over the next 15 years.
- 2.14 Merton’s Core Planning Strategy Table 28.2 (**SP3.2**), and also the evidence for **SP4.1**, demonstrates that Merton is not reliant on the delivery of one single piece of infrastructure (e.g. a new hospital or road) over the next 15 years.
- 2.15 SP4.1 supports Policy CS11: *Infrastructure* of the Core Planning Strategy in the following ways.
- 2.16 It provides policy detail and, where necessary, land designations to support infrastructure relating to the wider determinants of health: such as well designed neighbourhoods, spaces for recreation and social activities, support for walking and cycling, provision of a mix of homes and vibrant town centres. For example, sociable active and vibrant town centres, can provide a range of services and facilities, the delivery of which will be achieved by DM R1 *Location and scale of development in Merton’s town centres and neighbourhood parades*, DM R2 *Development of town centre type uses outside town centres* and DM R4 *Protection of shopping facilities within designated shopping frontages*. These policies though providing further details supports policy CS7: *Centres* of the Core Planning Strategy.
- 2.17 SP4.1 provides support healthcare and education services and facilities in Policy DM C1 *Community facilities* and DM C2 *Education for children and young people*. In addition to this, sites allocations have been proposed that recognise the potential needs identified for new healthcare and education services, while also allowing flexibility should services not be needed or be provided in a different way or location.
- 2.18 For example, the NHS has identified that there are a number of options for providing new healthcare services in the Mitcham area in the medium to long term (i.e. beyond the next five years). Therefore the council has worked with the NHS towards

allocating the NHS-owned Site 20 Wilson Hospital and Site 21 Birches Close to propose their allocation for the following:

“The size and location of this site gives it potential for a range of community uses (D1 Use Class) in whole or in part including healthcare and education.

If the Local Care Centre is to be located on this site then a healthcare (D1 Use Class) led mixed use scheme that may include some residential institution type accommodation (C2 Use Class) and or some residential (C3 Use Class).

If the Local Care Centre is to be located at another site, then the site has potential for community uses including education (D1 Use Class) and / or a nursing home (C2 Use Class) and / or residential (C3 Use Class).”

2.19 Recognising the future needs, especially for secondary schools beyond 2017, the council is proposing that sites are allocated in **SP4.1** that would be deliverable for educational purposes (e.g. site 08 Leyton Road, site 17 Worsfold House; site 36 Chaucer Centre). The future needs for school places have been assessed since the adoption of Merton’s Core Planning strategy using new information including results from the Census 2011. The report *“Provision of School Places – current situation and future strategy”* (**SP5.9 and 9a**) to Merton’s Cabinet on 11 November 2013 sets out the council’s most recent assessment of need for school places, how Merton has been meeting this need and the future strategy for school places is contained (attached as an appendix 3 to this statement). In preparing an effective Plan in **SP4.1**, Merton has also co-operated closely with neighbouring boroughs on the supply of and need for school places. All London boroughs are identifying increased needs; Merton’s neighbouring boroughs have not highlighted unmet needs within their areas for Merton to meet, nor that they require Merton to increase its need for school places.

2.20 **SP4.1** is an effective plan, supporting CS11 by working with the Environment Agency, transport and utilities providers (for example, Thames Water, National Grid) to ensure that sites proposed for allocation indicate the current existence of and demand for infrastructure. For example:

- In document **SP4.3**, on Site 02 Palestine Grove, the council is proposing to add reference to the Thames Water assessment of the local water / wastewater capacity relevant to the site’s development: *“Thames Water has assessed the water/wastewater capacity locally and do not envisage infrastructure concerns relating to potable water supply or wastewater services.”* Thames Water has carried out an assessment of local capacity against the development potential of all sites in the plan (see **SP4.4** and **SP4.5**) and the council is proposing to insert the results into each site (see **SP4.3**)
- In document **SP4.1**, on site 59 Baltic Close, the site issues refer to power lines acknowledge the national grid power lines running under Baltic Close and the proximity of the London Underground network. The site appears to be within 50m of London Underground tunnels and infrastructure, therefore London Underground Infrastructure Protection must be consulted. Also, development proposals will need to incorporate suitable mitigation measures

to address the issues associated with the location within a flood zone and a critical drainage area.

- 2.21 As well as assessing and helping to deliver infrastructure required by policy CS 11, the inclusion of such specific information in the site allocations provides certainty and clarity which will assist the delivery of these sites.
- 2.22 **SP4.1** also supports Merton's Core Planning Strategy by helping to provide space for business and jobs (including within town centres) via DM R1 to DM R7 and DM E1 to DM E4) by illustrating where a range of different land uses are supported on the Policies Map. These policies again provide more detail and further support policies CS7: *Centres* and CS12: *Economic Development* of the Core Planning Strategy.

How the Sites and Policies Plan will encourage the increased provision of the overall number and range of jobs (Policy CS 12):

- 2.23 Policy CS 12 *Economic Development* aims to support a diverse local economic base of jobs and businesses. It also seeks to ensure that there is an adequate supply of viable and sustainable employment sites in town centres, designated industrial areas and scattered across the borough. It is evidenced by various studies including Merton's Economic and Employment Land Study 2010 (**SP5.20**), the London Office Policy Review (2009 and 2012, **SP2.20**), the Mayor of London's SPG for Transport (**SP2.19**), the GLA Industrial Land Release Benchmarks in London (SP2.22) and overall the Mayor's Economic Development Strategy (**SP2.23**)
- 2.24 SP4.1 supports Policy CS12 by:
- Providing detailed policy guidance to inform development decisions which can provide a range of business locations that will help to create or sustain social, active and vibrant town centres including DM R1 *Location and scale of development in Merton's town centres and neighbourhood parades*, DM R2 *Development of town centre type uses outside town centres*, DM R4 *Protection of shopping facilities within designated shopping frontages*, DM R5 *Food and drink, leisure and entertainment uses*, DM R6 *Culture, arts and tourism development*, DM R7 *Markets*, DME1 *Employment areas in Merton* and DM E2e *Offices in town centres*.
 - Proposing land designations that demonstrate where specific policies apply. For example, SP4.1 Policies Map square C3 illustrates the extent of Mitcham town centre boundary, the primary and secondary shopping frontages relating to Policy DM R4 that are designated to try and maximise footfall, and therefore business attractiveness, spending power and job opportunities in Mitcham town centre.
 - Providing policy guidance to support business and job opportunities across the borough which will minimise the need to travel for residents and employees (DM E1 *Employment areas in Merton*, DM E2 *Offices in town centres*, DM E3 *Protection of scattered employment sites* and DM R3 *Protecting local / corner shops*) and to demonstrate where major developments can even provide local employment as they are being built (DM E4 *Local employment opportunities*).

How the Sites and Policies Plan will seek to protect and enhance the borough's public and private space network (Policy CS 13):

- 2.25 Policy CS 13 *Open space, nature conservation, leisure and culture*, helps to protect, enhance and promote access to parks, open spaces, allotments, nature conservation areas, space for sport, recreation, leisure, culture and play. So much is contained in Policy CS 13 that Merton's *Sites and Policies Plan* does not need to repeat it. **SP 4.1** helps to deliver the aims of CS 13 in the ways set out below.
- 2.26 It provides detailed policies on open space, nature conservation, detailed design considerations (for example, those that help to improve the public realm) and access to these locations and facilities, for example DM D1 *Urban design and the public realm*, DM D2 *Design considerations in all developments*, DM O1 *Open space*, DM O2 *Nature conservation, trees, hedges and landscape features* and DM T1 *support for sustainable transport and active travel*.
- 2.27 **SP4.1** Policies Map proposes the designation of land for a very wide range of types, scale and nature of open spaces, including nature conservation, land with recreational value and from small parks to Metropolitan Open Land. These land designations illustrate where specific planning policies will apply. **SP4.1** also sets out what criteria have been used to allocate land for open spaces.
- 2.28 **SP4.1** Policies Map illustrates the proposed boundary for the Merton section of the Wandle Valley Regional Park, thus demonstrating where policy CS 13(g)(7) will apply to development.
- 2.29 **SP4.1** Policies Map also illustrates the borough's transport network, including walking and cycling routes, which help to improve people's access to land and facilities for recreation, leisure, sports, culture and play.

How the Sites and Policies Plan will seek to ensure that development is designed to respect, reinforce and enhance the local character of the area (Policy CS 14):

- 2.30 Policy CS 14 *Design* covers all development and public realm in the whole borough. Its aims are supported by specific design policies in **SP4.1** from policies that inform the context and setting of development (DM D1 *Urban design and the public realm*) to design considerations in all development (DM D2) to DM D3 *Alterations and extensions to existing buildings* to very specific matters such as advertising and telecoms (DM D5 and D6).
- 2.31 The council also produces specific design guidance which complements these policies and helps to apply them by area. This includes:
- The Borough Character Study **SP5.26**.

- Conservation area character appraisals and management plans (e.g, for Mitcham Cricket Green (**SP5.41**)).
- Planning briefs for specific sites, e.g. **SP5.39** Rainbow industrial estate planning brief.

2.32 In conclusion, Merton's Local development plans are positively prepared, seeking *to meet objectively assessed development and infrastructure needs.... where it is reasonable to do so and consistent with achieving sustainable development* (NPPF **SP1.1** paragraph 182). The statutory development plan in Merton consists of the London Plan 2011 **SP2.1**, Merton's adopted Core Planning Strategy **SP3.2**; the adopted South London Waste Plan **SP5.38** and the emerging Sites and Policies Plan (**SP4.1**). The Sites and Policies Plan generally provides the detail and certainty to enable the needs identified in the London Plan and Merton's Core Planning Strategy to be met. Representations to the Sites and Policies Plan (Statement of Consultation (**SP4.6**) and Statement of Representations (**SP4.4**) and Duty to Co-operate (**SP4.11**) illustrate the support for development and infrastructure providers. In addition, Merton's Authority Monitoring Report 2012-13 (**SP5.64**) helps to illustrate how Merton is successfully delivering against its needs; the Sites and Policies Plan will provide the framework for this to continue.

Appendix 1:

Extract from SP4.3: *Sites and Policies Plan with post submission amendments added*

Appendix J. Review of the Sites and Polices and Policies Plan against Core Strategy Objectives and Policies

Merton's Local Plan Strategic Objectives	Sites & Polices and Polices Map polices (part of Merton's Local Plan)
<p>Strategic Objective 1: <i>To make Merton a municipal leader in improving the environment, taking the lead in tackling climate change, reducing pollution, developing a low carbon economy, consuming fewer resources and using them more effectively.</i></p> <p>We will achieve this by:</p> <ul style="list-style-type: none"> a. Reducing carbon emissions from new development; b. Supporting development of sustainable energy infrastructure to produce energy more efficiently; c. Applying the waste hierarchy and by exploiting the opportunities to utilise energy from waste; d. Promoting the retrofit of greater improved energy performance to existing buildings and greater connections with renewable and decentralised energy; e. Reducing reliance on private motorised transport and promoting sustainable public transport, cycling and walking. 	<p>DM EP1: Opportunities for decentralised energy networks</p> <p>DM EP2: Reducing and mitigating against noise</p> <p>DM EP3 Allowable Solutions</p> <p>DM EP4 Pollutants</p> <p>DM T1: Support for sustainable transport and active travel</p> <p>DM H4: Demolition and redevelopment of a single dwelling house</p>
<p>Strategic Objective 2: <i>To promote social cohesion and tackle deprivation by reducing inequalities.</i></p> <p>We will achieve this by:</p> <ul style="list-style-type: none"> a. Promoting socially mixed, sustainable, vibrant, safe and healthy communities especially where there are areas of deprivation; b. Meeting the varied needs of the local community and creating an attractive, thriving and safe borough; c. Regenerating Morden, Mitcham and Colliers Wood and South Wimbledon; d. Maintaining Wimbledon as the borough's Major Centre and supporting attractive Local Centres and Neighbourhood Parades which reflect local character. 	<p>DM R1: Location and scale of development in Merton town centres and neighbourhood parades</p> <p>DM R2: Development of town centre type use outside town centres</p> <p>DM R3 Protecting corner /local shops</p> <p>DM R4: Protection of shopping facilities within designation shopping frontages</p> <p>DM R5: Food and drink/leisure and entertainment uses</p> <p>DM R6: Culture, arts and tourism development</p> <p>DM R7 Markets</p> <p>DM H1 Supporting care housing for vulnerable people or secure residential intuitions for people as part of the criminal justice system</p> <p>DM H2: Housing Mix</p> <p>DM H3: Support for affordable housing</p> <p>DM H5: Student housing, other housing shared facilities and bedsits</p> <p>DM O1: Open space</p> <p>DM O2: Nature conservation, trees, hedges and landscape</p>

	<p>DM C1: Community facilities DM C2: Education for children and young people DM E1: Employment areas in Merton DM E2: Offices in town centres DM E3: Protection of scattered employment sites DM E4: Local employment opportunities DM T1: Support for sustainable transport and active travel</p>
<p>Strategic Objective 3: <i>To provide new homes and infrastructure within Merton's town centres and residential areas, through physical regeneration and effective use of space.</i></p> <p>We will achieve this by:</p> <ol style="list-style-type: none"> Delivering higher density new homes and associated infrastructure and social facilities that respect and enhance the local character of the area, in places with good public transport access; Supporting incremental growth in residential areas across the borough taking into account public transport accessibility, character and infrastructure; Protecting areas of the borough for uses other than residential; Delivering community services and infrastructure to support new homes through new development and the effective use of space. 	<p>DM H1 Supporting care housing for vulnerable people or secure residential intuitions for people as part of the criminal justice system DM H2: Housing Mix DM H3: Support for affordable housing DM H4: Demolition and redevelopment of a single dwelling house DM C1: Community facilities DM C2: Education for children and young people DM O1: Open space DM O2: Nature conservation, trees, hedges and landscape feature1 DM D2: Design consider</p>
<p>Strategic Objective 4: <i>To make Merton more prosperous with strong and diverse long term economic growth.</i></p> <p>We will achieve this by:</p> <ol style="list-style-type: none"> Ensuring that Merton's town centres (Wimbledon, Mitcham, Morden, Colliers Wood, Subject to its designation post 2011 as a District Centre, in accordance with Chapter 17 Centres - Policy 7 its local centres (Arthur Road, Motspur Park, North Mitcham, Raynes Park, Wimbledon Village) and local shopping parades are attractive and accessible to local residents and workers; Supporting a diverse local economy and promoting a commercially viable, thriving mix of premises, including retail, business and industrial uses that increase jobs and services available to local people; Maximising opportunities for employment and local businesses focusing on Merton's town centres and main employment areas along the 	<p>DM R1: Location and scale of development in Merton town centres and neighbourhood parades DM R2: Development of town centre type use outside town centres DM R3 Protecting corner /local shops DM R4: Protection of shopping facilities within designation shopping frontages DM R5: Food and drink/leisure and entertainment uses DM R6: Culture, arts and tourism development DM R7 Markets DM E1: Employment areas in Merton DM E2: Offices in town centres DM E3: Protection of scattered employment sites DM E4: Local employment opportunities</p>

<p>Wandle Valley.</p>	
<p>Strategic Objective 5: <i>To make Merton a healthier and better place for people to live and work in or visit.</i></p> <p>We will achieve this by:</p> <ol style="list-style-type: none"> Improving public health and well-being including working in partnership to deliver health facilities and promote healthy lifestyles; Providing a choice and mix of housing to meet the needs of all sectors of the community; Enhancing the learning environment to improve access to education, training and jobs; Improving access to nature and leisure facilities including opportunities for sport, play and relaxation; Promoting cultural and heritage activities; creating safe, attractive and accessible places. 	<p>DM R1: Location and scale of development in Merton town centres and neighbourhood parades DM R2: Development of town centre type use outside town centres DM R3 Protecting corner /local shops DM R4: Protection of shopping facilities within designation shopping frontages DM R5: Food and drink/leisure and entertainment uses DM R6: Culture, arts and tourism development DM R7 Markets DM O1: Open space DM C1: Community facilities DM C2: Education for children and young people DM E1: Employment areas in Merton DM E3: Protection of scattered employment sites DM E4: Local employment opportunities DM D1: Urban design and the public realm DM D4: managing heritage assets DM T1: Support for sustainable transport and active travel DM T2: Transport impacts of development</p>
<p>Strategy Objective 6: <i>To make Merton an exemplary borough in mitigating and adapting to climate change and to make it a more attractive and green place.</i></p> <p>We will achieve this by:</p> <ol style="list-style-type: none"> Mitigating and adapting to the local, regional, national and global challenges of climate change as they affect Merton and encouraging development to achieve the lowest possible impact; Applying the waste hierarchy where waste is minimised, re-used and recycled, and residual waste is disposed of sustainably in the right location using the most appropriate means; Enhancing existing open spaces and the natural environment, providing adequate habitats for biodiversity to flourish and expand; Providing the local community with a new regional park in the Wandle Valley. 	<p>DM EP1: Opportunities for decentralised energy networks DM EP2: Reducing and mitigating against noise DM EP3 Allowable Solutions DM EP4 Pollutants DM F1:Support for flood risk management DM F2:Sustainable drainage system (SuDS), wastewater and water infrastructure DM O1: Open space DM O2: Nature conservation, trees, hedges and landscape feature DM T1: Support for sustainable transport and active travel</p>
<p>Strategic Objective 7: <i>To make Merton a well connected place where walking, cycling and public transport are the modes of choice when planning all journeys.</i></p> <p>We will achieve this by:</p> <ol style="list-style-type: none"> Promoting smarter travel choices for people who live or work in and visit the borough; Developing improvements to the public 	<p>DM O1: Open space DM T1: Support for sustainable transport and active travel DM T2: Transport impacts of development DM T3 Car parking and servicing standards DM T4: Transport infrastructure DM T5: Access to road network</p>

<p>highway that balance the needs of all road users;</p> <p>c. Promoting road safety to encourage responsible behaviour by all users of the public highway.</p>	
<p>Strategy Objective 8: <i>To promote a high quality urban and suburban environment in Merton where development is well designed and contributes to the function and character of the borough.</i></p> <p>We will achieve this by:</p> <p>a. Conserving and enhancing the historic environment;</p> <p>b. Applying high quality design standards to all new development;</p> <p>c. Enhancing the public realm.</p>	<p>DM D1: Urban design and the public realm</p> <p>DM D2: Design consideration in all developments</p> <p>DM D3: Alterations and extension to existing buildings</p> <p>DM D4: managing heritage assets</p> <p>DM D5: Advertising</p> <p>DM D6: Telecommunications</p> <p>DM O2: Nature conservation, trees, hedges and landscape feature</p>

Appendix 2:

The Authority Monitoring Report

http://www.merton.gov.uk/environment/planning/planningpolicy/ldf/merton_amr_2012-13.pdf

Appendix 3:

The report "*Provision of School Places – current situation and future strategy*" to Merton's Cabinet on 11 November 2013

Committee: Cabinet

Date: 11th November 2013

Agenda item:

Wards: All

Subject: Provision of School Places – update and future strategy

Lead officer: Yvette Stanley, Director of Children, Schools and Families Department

Lead member: Cllr Martin Whelton

Forward Plan reference number: 1297

Contact officers: Paul Ballatt, Head of Commissioning, Strategy and Performance;

Tom Procter, Service Manager, Contracts, Procurement and School Organisation

Recommendations:

- A. For Cabinet to note the current position on demand and supply of school places, agreeing the contents of this report as the council's current school places strategy, and specifically:
- B. That the council reviews the position on specific supply and demand of primary school places over the next 18 months and beyond before committing to any further expansion in permanent accommodation beyond the 21 forms of entry increase already being progressed
- C. That officers progress the direction of travel for secondary and special school expansion outlined in paragraphs 2.26 and 2.30

1 PURPOSE OF REPORT AND EXECUTIVE SUMMARY

- 1.1. This report provides Cabinet with details of progress made in providing additional school places in the borough to ensure the council fulfils its duty to provide sufficient and suitable places for all pupils who wish to attend Merton schools.
- 1.2. In line with many urban local authorities across the country and in London, Merton has been experiencing a significant increase in demand for school places caused by a child population growth reflected in a dramatic increase in the live birth figure and also by other demographic factors.
- 1.3. This increase in demand has, to date, required the provision of significant additional permanent capacity in the primary school sector achieved through expansion of existing schools. More expansion of primary school places is anticipated through to 2020/21, albeit some likely to be via temporary provision only .

- 1.4. Demand for secondary school places will start to increase in 2014/15 with pressure on sufficiency of places beginning to be felt in 2015/16, with existing surplus places in the sector rapidly diminishing and total year 7 places needing to increase moderately at this time, and accelerating over the following years to keep up with demand. A major secondary places expansion programme will be required through to the early 2020s.
- 1.5. Some additional special educational needs (SEN) places have already been provided in further specialist provision within mainstream schools and through expansion of existing special schools. In line with increases in the general population, demand for SEN places will continue to grow into the next decade.
- 1.6. The report details expansion projects undertaken to date and in planning. It informs members of the planning assumptions made for the next phase of the expansion programme and provides some detail in respect of how officers will approach the further demand across all school sectors. The report is as detailed as possible bearing in mind that while providing sufficient and suitable school places requires a strategic approach it is also necessary to ensure flexibility as, while it is possible to forecast general changes in demand, it is not possible to forecast the exact level of demand in all specific areas given the many changing factors that contribute to the demand for school places.

2 DETAILS

- 2.1. Merton's vision for its schools and the children and young people who attend them is set out in the Children and Young People's Plan and in the Merton Education Partnership statement. Merton seeks:
 - To provide the highest standards of education and ensure all our schools are good or outstanding;
 - Results for attainment and progress which compare with the best in London;
 - To ensure that all children and young people enjoy learning opportunities, feel rewarded by their experience and achieve their full potential;
 - Provision which contributes to the broader well-being of children and families
 - Provision which is a positive choice for families
- 2.2. Our approach to the increased supply of places in the primary sector has been informed by the administration's commitment to expanding good and outstanding local schools, schools which are popular and over-subscribed and smaller schools to aid their financial viability. Permanent expansion in good quality accommodation has been agreed where demand is expected to be sustained but it has been recognised that some temporary provision may be provided later in the strategy to address shorter-term increase in demand. These principles have enabled an effective and affordable strategy to be implemented.
- 2.3. Further principles that the council may wish to agree for any change in secondary provision are as follows:
 - The increase in required school places is a key opportunity to reshape the secondary school landscape in Merton to respond to the expectations of parents and fundamentally change the perception of secondary school education in Merton

- We want to seek to address the historic flow of pupils to out of borough provision in order to retain a more representative ability profile in Merton's own secondary schools.
- We want to maintain diversity of provision and provide attractive choices for pupils and parents.
- We want the whole network of schools to be able to meet the wide range of individual needs of pupils
- We recognise that size of schools is an important consideration for educational professionals and parents and will plan our expansion strategy accordingly.

2.4 In respect of meeting increasing demand for SEN places, the following specific principles should apply:

- Merton has a well-established inclusion strategy which means that pupils with special needs should, wherever possible and appropriate, be educated either with their peers in mainstream schools or in local special school provision
- Local provision enables easier access to other specialist services – eg health provision; social care support – which are needed to promote better outcomes for some pupils with SEN
- SEN pupils with the most complex needs require specialist accommodation and equipment in schools which, necessarily, results in higher cost for this type of provision.

2.5 The current position in relation to primary, secondary and special school provision is outlined in three sections in this report.

Primary Places – progress to date

2.6 From a baseline position in 2007/08, Merton is committed to providing 21 additional forms of entry in the borough's primary schools in permanent accommodation. A form of entry provides 30 places per year, and as it flows through into all seven years of primary school, the additional 21 forms of entry will provide an extra 4,410 permanent primary school places.

2.7 The table below provides an update of the permanent expansion schemes providing 21 forms of entry:

TABLE OF PERMANENT SCHOOL EXPANSIONS FROM 2008/09

	School	Year of first Additional Reception Class	Status
1	Wimbledon Chase	2008/09	Permanent Scheme completed
2	Holy Trinity CE	2008/09	Permanent Scheme completed
3	St Thomas Of Canterbury RC	2008/09	Permanent Scheme completed

4	Benedict	2009/10	Permanent Scheme completed
5	Hollymount	2009/10	Permanent Scheme completed
6	Joseph Hood	2009/10	Permanent Scheme completed
7	Aragon	2010/11	Permanent Scheme completed
8	Cranmer	2010/11	Permanent Scheme under construction
9	All Saints CE (Haydons Road))	2011/12	Permanent Scheme completed
10	Goringe Park	2011/12	Permanent Scheme completed
11	Liberty	2011/12	Permanent Scheme completed
12	St Mary's RC	2011/12	Phase 1 permanent scheme completed – phase 2 to contract in 2013
13 and 14	Singlegate	2011/12	Phase 1 permanent scheme completed. Phase 2 incorporates adjacent former school building purchased to allow school to be 3 forms of entry from 2014/15. To contract in early 2014.
15	William Morris	2011/12	Permanent scheme completed
16	Wimbledon Park	2011/12	Permanent scheme to complete in late 2013
17	Dundonald	2011/12 (But not in 2012/13 or 2013/14	Scheme delayed by legal issues but planned to contract in spring 2014
18	Hillcross	2011/12	Permanent Scheme to contract in 2013
19	Merton Abbey	2011/12	Permanent Scheme to contract in 2013
20	Poplar	2012/13 (But not in 2013/14)	Permanent Scheme to contract in 2013
21	Pelham	2012/13	Permanent Scheme to contract in 2013

Note – in various years The Priory, Bishop Gilpin, Beecholme and Garfield (3rd form of entry) have provided single year solutions to provide additional school places but permanent expansion is not currently planned. Garfield permanently expanded to 2 forms of entry from 2006 and so is not included in this table

- 2.8 Of the 21 permanent additional forms of entry being provided in 20 schools, 17 are currently rated good or outstanding by Ofsted, and 12 were 1 form of entry schools classed as 'small'. The schools have been expanded in the geographic areas where there is most need thus not increasing travel distance for local residents to attend school. Schemes have been carefully assessed and monitored by senior managers and by project managers to ensure affordability.
- 2.9 Officers have needed to keep demand under constant review to enable sufficient places to be provided and surplus to be kept to a reasonable minimum. This includes assessing admissions information including school preferences and residence location in relation to schools. As a result, it has been possible to operate to a very low surplus, generally of around 2-3%, yet increase the number of pupils obtaining places at higher preferences school. Previously the council operated to the traditional Audit Commission recommendation of 5-10% surplus places which is not affordable given the level of expansion required.

- 2.10 The number of expansion schemes to manage has been a major challenge for the council, requiring complex preliminary planning, consultation and engagement, design and procurement processes to be undertaken and project management of the delivery stage requiring careful stakeholder management, problem solving and robust relationships with contractors. While there have inevitably been many issues to resolve, this major programme of expansions has been undertaken effectively with schools and parents being highly satisfied with the expanded schools.
- 2.11 In July Cabinet approved that the council should enter into contracts for construction of seven expansion schemes at Cranmer, Hillcross, Merton Abbey, Pelham, Poplar, St. Mary's RC (phase 2), and Singlegate Primary Schools (phase 2). Following delays due to the legal complexities and subject to Cabinet approval in December, it is expected that the council will be able to contract for the expansion of Dundonald Primary School in spring 2014, thereby fully delivering the 21 forms of entry required, and in an area where there is some of the greatest pressure on places.

Primary places – future need and strategy

- 2.12 In implementing the strategy to provide sufficient and suitable places, officers have regularly refreshed planning assumptions based on GLA pupil projection data and local intelligence. At the time of writing this report, there are 64 (2.4%) vacancies in Merton's primary schools reception year; all applicants have been provided with a reasonable offer of a place though some have not currently accepted and are not of statutory school age. This again demonstrates that, to date, officers' planning has successfully ensured sufficient places across the sector, working to a small contingency for surplus places that allows little room for error.
- 2.13 The GLA pupil projection forecasts show a considerable increase in demand in reception year places up to 2017/18, showing that on the basis of the council having a total admission number of 2730 (the 21 form of entry increase referred to in the above paragraphs) there will be a small deficit in 2014/15 increasing to 167 reception places in 2017/18 based on its standard model.
- 2.14 A summary of analysis of GLA pupil projection models to 2020-21 is contained at Appendix 1, including planning area level, showing the greatest pressure on places will be in Wimbledon and central Mitcham/Colliers Wood.
- 2.15 However, further local intelligence regarding recent admissions applications shows that this may be a slightly high forecast. The council also needs to take into consideration the potential impact on demand of the proposed new Park Community Free School likely to be sited on the Merton/Kingston border.
- 2.16 Given the lack of certainty for demand beyond the 21 forms of entry, and the fact that there are currently two schools with spare classrooms that could provide one extra reception class in an emergency, officers are adopting a prudent and cautious approach to planning for future expansions.

- 2.17 At this stage, therefore, officers are not progressing specific permanent school expansions beyond the 21 forms of entry committed and plan to use temporary provision if required until it is clear if and where any further permanent school expansion in the primary sector is needed for the long term. Officers will continue to keep need under careful review - via admissions data; further GLA modelling and intelligence on local housing development - with the cabinet member for education and schools.
- 2.18 It should be noted that any further significant housing development which has not already been included in planning assumptions could impact further on pupil place demand.

Secondary Places strategy

- 2.19 There are 8 state funded mainstream secondary schools in LB Merton, 5 of which are maintained (of which two are Catholic Voluntary Aided Schools) and 3 are Academies.
- 2.20 Officers have been considering the future impact of the increasing demand in the primary sector on Merton's secondary school provision for some time. This has involved consultation with schools and governing bodies; examination of GLA pupil projection models; analysis of retention rates of pupils leaving primary and entering secondary provision; high level feasibility studies of existing secondary school sites and the commissioning of a site search to identify possible sites for new provision.
- 2.21 Medium term forecasting for secondary school provision should, in theory, be easier than for primary provision since cohorts of school pupils will be in the state school system for seven years before requiring secondary places. However, in practice, there are a number of variables which make planning for secondary school places extremely complex.
- 2.22 These factors include the fact that the secondary school population is inherently more mobile than in the primary sector; the attractiveness of types of education e.g. grammar and faith schools in neighbouring boroughs, and those boroughs' own plans for secondary provision. There have also been a significant number of approved secondary Free Schools (State funded schools directly approved and funded by the Department for Education) in south London which will add to the number of available places over the next few years. Changes to migration patterns and levels and location of housing development also need to be taken into consideration, and cannot be forecast with certainty.
- 2.23 All these factors may have significant impact on the transfer rates from primary to secondary school and demand overall and officers, therefore, need to take both a cautious and pragmatic approach to planning for secondary provision.

- 2.24 A summary of analysis of current admission numbers, numbers on roll and GLA pupil projection data is contained at appendix 2. This analysis suggests that demand for secondary school places will start to increase in 2014/15 with pressure on sufficiency of places beginning to be felt in 2015/16, with existing surplus places in the sector rapidly diminishing and total year 7 places needing to increase moderately at this time. The increase would then need to accelerate and there will be a significant increase in 2018/19. By the early 2020 the total increase is likely to be between 20 and 30 additional forms of entry in secondary provision compared to current admission numbers.
- 2.25 Following consultation with schools, the cabinet member for education and other cabinet colleagues, engagement with the secondary places scrutiny task group and discussions with education professionals within CSF Department, an outline 'direction of travel' to develop the strategy has been proposed and agreed.
- 2.26 Key elements of this direction of travel are:
- A phased approach is appropriate for secondary school expansion in Merton over the next ten years, subject to regular reviews of supply and demand, and decisions made to ensure that places are provided when there is a 'basic need' (overall shortfall in the area of supply of places)
 - The additional capacity required will be met through expansion of existing secondary schools and establishment of new provision.
 - The initial phase will require schools to fill existing surplus places and the three academies to return to admission numbers set at the point of school re-organisation in the early 2000s. All secondary schools except the two Catholic School will, at that point, be 8 forms of entry ("FE") (240 places per year).
 - Further school expansion to complement the above to provide sufficient places, with the aim that schools should not be more than 10FE (300 places per year)
 - Officers will progress the feasibility of a new school/school provision to assist in providing for the exceptional increase in demand in year 7 from September 2018.
 - A second new school/provision would be implemented if it became clear in the latter half of this decade that the increase to provide basic need places will be at the higher end of the projections, and it is required to ensure that existing schools do not permanently provide for above 10FE.
- 2.27 To enable the direction of travel to lead to firm plans officers are progressing the feasibility of expanding existing schools, and additional sites for new provision. This is being undertaken as follows:
- High level studies have been completed to determine the feasibility of expanding all of Merton's existing state funded secondary schools. This has enabled officers to write to all schools seeking their support for expansion on the basis of the parameters set out in paragraph 2.26 above.
 - A search for additional school sites has been undertaken by Capita Symonds. They were requested to look at all areas of the borough except Longthornton and Pollards Hill wards where it was clear that expansion of

Harris Merton and St. Mark's Academy would be able to provide for any increase in demand, with the first priority being Colliers Wood/North Mitcham on account that this is a high growth area without a secondary school currently in the vicinity. This study identified a small number of potential options, though all have complications. Over the next nine months more detailed work will be undertaken to determine the feasibility and practicality of sites identified in the study, together with the responses from existing schools on expansion, and plans of neighbouring authorities.

SEN Places strategy

- 2.28 LB Merton caters for pupils with SEN (Special Educational needs) through mainstream schools, specialist provision within mainstream schools ("additional resourced provision"), special schools, and use of independent provision. There are three maintained special schools, and three primary and three secondary schools provide specialist provision for pupils with ASD (autistic spectrum disorders) and SCLN (Speech, language and communication needs. There is also a Pupil Referral Unit (SMART centre) which operates under the same management as Melrose, our special school for pupils with emotional and behavioural difficulties.
- 2.29 The strategy in recent years has been to ensure this balance of provision is maintained in light of increased demand, and to ensure that, where possible, there is a reduced reliance on more expensive independent provision where it is not necessary. To this end the council has over the past five years:
- Provided suitable accommodation for pupils at Perseid School (for pupils with severe and complex learning difficulties) through a new secondary school site and a modest increase in capacity
 - Provided further early years and key stage 1 places at Perseid School to meet demand
 - Additional places at Cricket Green School (children with additional complex and varied needs) including 6th form provision to meet demand
 - Changed the designation of Garden School specialist provision to be for ASD
- 2.30 In order to provide for the increase in demand the following will be required over the next 10 years:
- Increase the capacity of Perseid lower school to 84 places by 2015/16, and to subsequently increase the capacity of the upper school thereafter to meet the higher cohorts of pupils
 - Further increase special school places for children with additional complex and varied needs
 - Increase the number of additional ASD places in specialist provision within mainstream school both in the primary and secondary school sector

3 ALTERNATIVE OPTIONS

- 3.1. The council has a statutory duty to provide sufficient school places so, given the increase in demand, there is no alternative but to provide more school places in the borough. There is a range of options to deliver this, and this report set out the general strategy which will require more detailed options appraisals.

4 CONSULTATION UNDERTAKEN OR PROPOSED

- 4.1. All plans implemented to date in respect of the provision of additional pupil places have been subject to consultation, some required in connection with statutory processes. This will also be the case for future plans to expand provision.

5 TIMETABLE

- 5.1. This report covers additional school places provided and required between 2008-09 and 2021-22.

6 FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS

Capital

- 6.1 The cost to provide additional school places to ensure sufficient provision is substantial. The council has the statutory responsibility to provide sufficient places so is ultimately responsible for funding sufficient school places in its area but there is an expectation that there will be substantial assistance from central government grant from the Department for Education (DfE) and Section 106/CILL as appropriate.
- 6.2 To date, while DfE funding has been substantial, and was aided this year by LB Merton's highly successful Targeted Basic need bid over £15 million, the council is still paying substantial additional sums to fund the school expansion programme and now forms the major part of its overall programme.
- 6.3 The estimated expenditure required to meet the need outlined in this report is incorporated in the draft Capital Programme 2013-2018 that Cabinet agreed on 21 October 2013 for consideration by scrutiny in November. Estimated expenditure up to 2022/23 is also being built into the indicative capital programme.
- 6.4 It should be recognised that the DfE has not provided any indication of capital grant funding on school expansion beyond the 2014/15 financial year but approximately £8m pa has been assumed within the capital financing model and the MTFS . Capital estimates for future years will also need to take into account construction inflation which, after four years of being virtually zero, has recently increased with the upturn in construction activity, and is forecast to increase further in the coming years.
- 6.5 As the strategy develops into specific schemes they will be subject to more detailed feasibility studies and design work with a view to obtaining best value for money and, together with external funding, will be reviewed in the normal way as part of the annual capital programme review process

Revenue

Expanding schools

- 6.5. The revenue impact to operate the larger schools will be funded through the Dedicated Schools Grant (DSG), which increases on the basis of additional pupils, although there is a delay in receiving the funding for the additional pupils

and it is not retrospective. This is the position whichever school is expanded. The DSG is top-sliced to provide expanding primary schools £60,000 per class to fund revenue costs from September onwards. It is envisaged that a similar scheme will operate for secondary schools.

New schools

- 6.6 Under current legislation/regulations new legal entity school(s) would be either a free school(s) or academies, although this will complicate their revenue funding it will follow the same principles of any other school expansion.

7 LEGAL AND STATUTORY IMPLICATIONS

- 7.1 The council has a duty under section 14 of the education act 1996 to secure that sufficient schools for providing primary and secondary education are available for its area. It must respond to any parental representations on the exercise of this duty.
- 7.2 Where a maintained school is to be permanently expanded, the council must first follow the statutory process for “prescribed alterations” to schools. One of the factors to be taken into account is the need for places and there is a presumption in favour of proposals to expand successful and popular schools to meet parental preference. The decision maker must also consider the effect on standards, including on other schools in the area and whether capital funds are available for the proposal to be implemented.
- 7.3 The council can propose a permanent increase in capacity for any type of maintained school, including foundation or voluntary schools but must follow the statutory procedure..
- 7.4 Temporary expansions of schools by the addition of a reception class as an exception to the normal published admission number or an increase in the published admission number would need to be agreed by the admission authority for the school.
- 7.5 Where there is not space to extend a school on its current site, consideration can be given to expansion elsewhere, creating a “split site” school. This may be more efficient than creating a new, very small school on a new site.
- 7.6 The legislation on new schools has been amended with effect from 1 February 2012 by the Education Act 2011. There is now a presumption that new publicly funded schools will be academies or free schools. The council would be required to transfer the site for a new academy to a new provider and provide capital funding for the new school.
- 7.7 The government is encouraging communities to propose new ‘free schools’ which have the same legal structure and requirements as academies. Free schools may be established in response to invitations for academy proposals by local authorities seeking to establish a new school or may be established through an annual application process under the government’s free school programme.

8 HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS

- 8.1. The school expansion programme will be considered in the light of equalities legislation, and ensure that all children, including with special education needs, have access to a suitable school place.

9 CRIME AND DISORDER IMPLICATIONS

- 9.1. No specific implications from this report.

10 RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS

- 10.1. The school expansion is a major programme with significant risks which are managed at project and programme level.

11 APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT

Appendix 1 - Primary school pupil projection data

Appendix 2 – Secondary school pupil projection data

Appendix 3 – SEN data

12 BACKGROUND PAPERS

N/A

Appendix 1 - Primary School provision

TABLE 1- ACTUAL AND GLAs FORECAST ROLL AGAINST ADMISSION NUMBERS INCLUDING PLANNED INCREASES

	Total admission number (PAN)	Cumulative extra PAN since 2007/08	Actual roll/GLA Standard projection published Spring '12	Surplus/Deficit (-) against PAN (No allowance for 2% surplus)	Extra FEs required above 21FE planned, with 2% surplus allowance	Zero development forecast	Alternate model forecast
2007/08	2100		1,937	63 (3.0%)			
2008/09	2190	3fe	2,140	50 (2.3%)			
2009/10	2280	6fe	2,229	51 (2.2%)			
2010/11	2370	9fe	2,285	85 (3.5%)			
2011/12	2670	19fe	2651	19 (0.7%)			
2012/13	2730	21fe	2599	131 (4.8%)			
2013/14	2640	18fe	2637	3		2,600	2,677
2014/15	2730	21fe*	2775	-45	4-5FE (25-26 FE since 2007)	2,718	2,844
2015/16	2730	21fe*	2779	-49	4-5FE (25-26 FE since 2007)	2,727	2,898
2016/17	2730	21fe*	2897	-167	7-8FE (28-29 FE since 2007)	2,812	3,032
2017/18	2730	21fe*	2885	-155	7-8FE	2,783	3,065
2018/19	2730	21fe*	2844	-114	6-7FE	2,731	3,069
2019/20	2730	21fe*	2783	-53	4FE	2,663	3,052
2020/21	2730	21fe*	2727	3	2FE	2,597	3,031
2021/22	2730	21fe*	2661	69	0FE	2,533	3,006

Notes

“FE” is a form of entry – 30 places per year

“PAN” is published admission number. Column 2 is the total of all school PANs for LB Merton primary schools

We are seeking to provide a 2% surplus (i.e. approximately 60 places) so ideally the surplus in 5th column above should be around 60. The 6th column therefore shows the FEs required after allowing for the 2% surplus i.e. 60 places/2FE.

Park Community “Free” School is planned to open in September 2014 on the LB Merton/RB Kingston borders and provide 60 places per year (2FE). This will be above the 2640 places stated

It should be noted that based on admissions information for September 2013 the GLA forecasts are expected to be approximately 60 (i.e. 2FE) higher than actual. Using their standard model forecasts and the same over forecast in September 2014, 2730 reception places plus Park Community School may be sufficient for September 2014, but contingency plans will be in place.

TABLE 2- GLA 2013 STANDARD PROJECTION MODEL PUPIL FORECASTS BY SCHOOL PLACES PLANNING AREAS FOR STATUTORY SCHOOL YEARS

PLAN AREA 1 Hillside, Raynes Park and Village wards

PLAN AREA 2 Cannon Hill, Lower Morden and West Barnes wards

PLAN AREA 3 Abbey, Dundonald, Merton Park, Trinity and Wimbledon Park

PLAN AREA 4 Ravensbury and St. Helier wards

PLAN AREA 5 Colliers Wood, Cricket Green, Figge's Marsh, Graveney and Lavender Fields

PLAN AREA 6 Longthornton and Pollards Hill wards

PA	2013/14											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	200	207	208	221	202	163	171	0	0	0	0	0
2	399	399	398	365	327	315	292	0	0	0	0	0
3	733	739	728	554	537	516	451	0	0	0	0	0
4	214	213	211	211	212	207	192	0	0	0	0	0
5	785	781	769	673	649	616	546	0	0	0	0	0
6	306	287	314	271	281	276	245	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	1498	1461	1456	1515	1577
Total	2637	2625	2629	2296	2208	2092	1896	1498	1461	1456	1515	1577

PA	2014/15											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	212	198	207	208	221	202	163	0	0	0	0	0
2	419	393	398	398	365	327	315	0	0	0	0	0
3	782	731	737	726	553	536	515	0	0	0	0	0
4	220	217	212	211	211	211	206	0	0	0	0	0
5	840	786	781	769	673	649	615	0	0	0	0	0
6	303	321	290	317	274	283	278	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	1557	1498	1460	1457	1514
Total	2775	2645	2625	2629	2296	2208	2092	1557	1498	1460	1457	1514

PA	2015/16											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	214	209	197	206	207	220	201	0	0	0	0	0
2	412	412	392	397	397	364	326	0	0	0	0	0
3	808	780	729	736	725	552	535	0	0	0	0	0
4	213	222	216	212	210	210	211	0	0	0	0	0
5	837	842	788	783	769	674	649	0	0	0	0	0
6	314	313	321	290	317	273	283	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	1716	1556	1496	1459	1454
Total	2799	2780	2643	2623	2627	2294	2206	1716	1556	1496	1459	1454

PA	2016/17											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	214	211	209	197	206	207	220	0	0	0	0	0
2	420	406	411	391	397	396	363	0	0	0	0	0
3	815	806	778	728	734	724	551	0	0	0	0	0
4	233	215	222	215	211	209	210	0	0	0	0	0
5	892	839	842	788	783	770	674	0	0	0	0	0
6	323	324	312	320	289	316	273	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	1807	1714	1553	1495	1457
Total	2897	2801	2775	2639	2619	2623	2291	1807	1714	1553	1495	1457

PA	2017/18											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	212	211	211	208	196	205	206	0	0	0	0	0
2	417	413	405	410	390	396	396	0	0	0	0	0
3	803	812	804	776	726	732	722	0	0	0	0	0
4	233	235	215	221	215	210	209	0	0	0	0	0
5	892	893	839	842	787	783	770	0	0	0	0	0
6	328	333	323	311	320	288	316	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	1877	1805	1711	1551	1492
Total	2885	2898	2795	2769	2634	2615	2619	1877	1805	1711	1551	1492

Increase 2013/14 to 2017/18

PA	Increase 2013/14 to 2017/18											
	Reception	1	2	3	4	5	6	7	8	9	10	11
1	12	4	3	-13	-6	42	36	0	0	0	0	0
2	18	15	6	45	63	81	103	0	0	0	0	0
3	70	74	75	222	189	216	272	0	0	0	0	0
4	18	22	3	9	3	3	17	0	0	0	0	0
5	107	112	70	169	139	168	224	0	0	0	0	0
6	22	46	9	40	39	13	71	0	0	0	0	0
Secondary all areas	0	0	0	0	0	0	0	379	344	254	37	-86
Total	248	273	167	473	426	523	722	379	344	254	37	-86

TABLE 3 - GLA PUBLISHED 21 DECEMBER 2012 (2011 CENSUS BASED) - LB MERTON POPULATION FOR MALES AND FEMALES AGE 4 (FIRST YEAR OF PRIMARY SCHOOL)

Year	"SHLAA" model persons 4 years	"Trend-based" model persons 4 years
2007	2,276	2,276
2008	2,420	2,420
2009	2,499	2,499
2010	2,543	2,543
2011	2,790	2,790
2012	2,786	2,806
2013	2,746	2,788
2014	2,922	2,995
2015	2,926	3,027
2016	3,062	3,188
2017	3,061	3,229
2018	3,033	3,239
2019	2,983	3,222
2020	2,933	3,201
2021	2,882	3,176
2022	2,833	3,148
2023	2,797	3,130
2024	2,773	3,121
2025	2,752	3,112

'SHLAA' is the GLA population projection model which is linked to development trajectories from the Strategic Housing Land Availability Assessment (SHLAA).

The "Trend-based" projection doesn't take dwellings into account but considers births, population (by single year of age), migration (outflows and inflows), total fertility rates, and life expectancy at birth.

The GLA previously only provided the 'SHLAA' model, but found in recent years that it severely under estimated the growth in child population as it did not take account of the rising child per dwelling ratio. The "trend based" is an alternative model produced by the GLA for the first time; the GLA feel it may be more accurate for councils without significant new build.

Appendix 2 - Secondary school provision

TABLE 4 – CURRENT ADMISSION NUMBERS AND NUMBER ON ROLL

	Year 7 Admis. No Sep 2013	Year 7 No. on roll Jan 13
Harris Academy Morden	180	95
Raynes Park High School	240	149
Ricards Lodge High School	240	238
Rutlish School	240	233
Ursuline High School Wimbledon	210	209
Wimbledon College	199	202
Harris Academy Merton	180	178
St Mark's Church of England Academy	180	150
TOTAL	1669	1454

TABLE 5 – GLA STANDARD MODEL – SUMMARY OF CUMULATIVE EXTRA FEs REQUIRED WITH 2% SURPLUS (DETAIL IN TABLE 6)

	Cumulative extra FEs required with 2% surplus – standard model
2015/16	3-4FE
2016/17	6-7FE
2017/18	9FE
2018/19	18FE
2019/20	18FE
2020/21	18FE
2021/22	21FE
2022/23	21-22FE
2023/24	24FE
2024/25	24FE
2025/26	23FE
2026/27	21FE
2027/28	20FE
2028/29	18FE
2029/30	17FE

TABLE 6 – FUTURE DEFICIT OF PLACES AGAINST GLA’S 3 PUPIL PROJECTION MODELS

	Deficit (-) against Sep 13 admission numbers “Standard”	Deficit in FEs ***	Deficit (-) against Sep 13 admission numbers “Zero development”	Deficit in FEs ***	Deficit (-) against Sep 13 admission numbers “Alternate”	Deficit in FEs ***
2013/14	172	3.7	182	4.1	159	3.3
2014/15	113	1.8	129	2.3	92	1.1
2015/16	-47	-3.6	-25	-2.8	-78	-4.6
2016/17	-138	-6.6	-111	-5.7	-182	-8.1
2017/18	-208	-8.9	-177	-7.9	-265	-10.8
2018/19	-477	-17.9	-437	-16.6	-557	-20.6
2019/20	-467	-17.6	-423	-16.1	-567	-20.9
2020/21 *	-469	-17.6	-420	-16.0	-594	-21.8
2021/22	-573	-21.1	-515	-19.2	-733	-26.4
2022/23	-586	-21.5	-520	-19.3	-772	-27.7
2023/24**	-665	-24.2	-589	-21.6	-882	-31.4
2024/25	-654	-23.8	-567	-20.9	-906	-32.2
2025/26	-622	-22.7	-525	-19.5	-905	-32.2
2026/27	-576	-21.2	-471	-17.7	-885	-31.5
2027/28	-531	-19.7	-419	-16.0	-861	-30.7
2028/29	-485	-18.2	-368	-14.3	-835	-29.8
2029/30	-442	-16.7	-320	-12.7	-809	-29.0

*** 2 FE (60 places) added to actual deficit to allow a minimum surplus of 2-3%

“FEs” are forms of entry – 30 pupils per year group and the accepted steps that schools would expand in. A 1 FE expansion would be 30 pupils per year, 150 pupils in the 5 fully statutory year groups of secondary school.

Standard based on the GLA’s “SHLAA” population projection model, zero development based on no developments, and alternate based on the GLA’s “trend based” population model. See table 5 for explanation. All GLA projections based on a transfer rate from primary to secondary school of approximately 80%.

Peak in yellow

* From this year projections don’t take into account actual reception year rolls

** From this year projections don’t take account of live birth data

The three models shows a difference in the peak in demand of just over 10 forms of entry, the equivalent of more than a large secondary school.

The council has also considered simple transfer rate models based on an 80%, 85% and 90% year 6 to year 7 transfer. This shows the increase in 2022/23 would need to be:

Based on 80%: 20FE expansion required by 2024/25 including 2% surplus allowance

Based on 85%: 23FE expansion required including 2% surplus allowance

Based on 90%: 27FE expansion required including 2% surplus allowance

TABLE 7- GLA PUBLISHED 21 DECEMBER 2012 (2011 CENSUS BASED) - LB MERTON POPULATION FOR MALES AND FEMALES AGE 11 (FIRST YEAR OF SECONDARY SCHOOL)

Year	MF11 SHLAA		MF11 Trend based	
2001	2148		2,148	
2002	2123		2,123	
2003	2065		2,065	
2004	2064		2,064	
2005	1904		1,904	
2006	1989		1,989	
2007	1970		1,970	
2008	2157		2,157	
2009	2119		2,119	
2010	2113		2,113	
2011	2078		2,078	
2012	2109		2,119	
2013	1999		2,016	
2014	2057		2,084	
2015	2173		2,211	
2016	2292		2,342	
2017	2328		2,390	
2018	2489		2,569	
2019	2496		2,593	
2020	2469		2,585	
2021	2586		2,731	
2022	2598		2,767	
2023	2696		2,889	
2024	2704	705 extra (85% is 600)	2,928	912 extra (85% is 775)
2025	2689		2,940	
2026	2655		2,927	
2027	2622		2,912	
2028	2590		2,892	
2029	2557		2,869	
2030	2534		2,854	

'SHLAA' is the GLA population projection model which is linked to development trajectories from the Strategic Housing Land Availability Assessment (SHLAA).

The "Trend-based" projection doesn't take dwellings into account but considers births, population (by single year of age), migration (outflows and inflows), total fertility rates, and life expectancy at birth.

The GLA previously only provided the 'SHLAA' model, but found in recent years that it severely under estimated the growth in child population as it did not take account of the rising child per dwelling ratio. The "trend based" is an alternative model produced by the GLA for the first time; the GLA feel it may be more accurate for councils without significant new build.

TABLE 8 – RETENTION RATE FROM LB MERTON SCHOOLS YEAR 6 TO 7

2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
88.5%	89.7%	88.2%	87.6%	85.5%	84.5%	79.2%	81.2% *

* Estimate based on September 2013 admissions

Appendix 3 – Special school provision

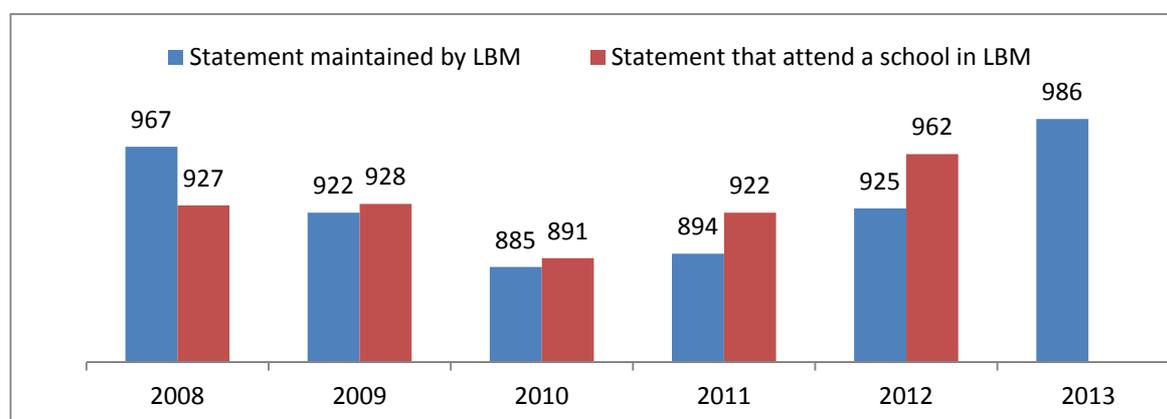
Changing pattern of SEN provision in the London Borough of Merton

Number of pupils with a statement of SEN maintained by the London Borough of Merton¹

	2008	2009	2010	2011	2012	2013
Merton	967	922	885	894	925	986

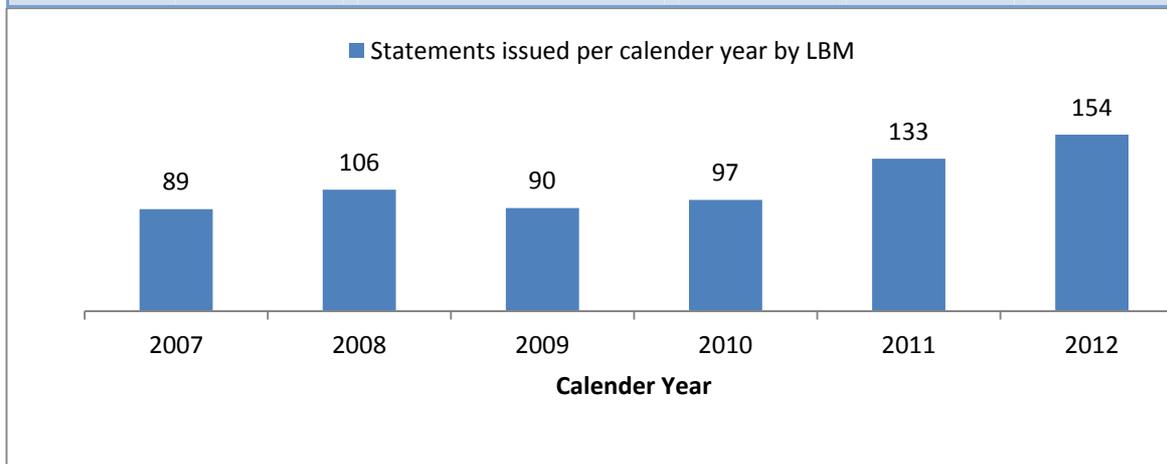
Number of pupils with a statement of SEN that attend a school in the London Borough of Merton²

	2008	2009	2010	2011	2012	2013
Merton	927	928	891	922	962	-



Number of new statements issued per calendar year by the London Borough of Merton³

SEN2 Year	2008	2009	2010	2011	2012	2013
Under 5	28	27	-	26	40	41
5 to 10	41	41	-	43	62	68
11 to 15	20	38	-	24	29	42
16 to 19	0	0	-	4	2	3
Total	89	106	90	97	133	154



¹ Source: LBM SEN2 Returns 2008-2013

² Source: DfE School Census 2008-2012

³ Source: LBM SEN2 Returns 2008-2013

Number of new statements issued per calendar year by the London Borough of Merton with high needs.⁴⁵

SEN2 Year	2008	2009	2010	2011	2012	2013
High needs pupils	25	33	*	15	28	41
Total new statements	89	106	90	97	133	154
High needs %	28.1	31.1	*	15.5	21.2	26.6

Number of pupils with statements maintained by the London Borough of Merton with high needs⁶

SEN2 Year	2008	2009	2010	2011	2012	2013
High needs	429	417	405	413	441	513
Total statements	967	922	885	894	925	986
High needs %	44.4	45.2	45.8	46.2	47.7	52.0

Percentage of school population attending mainstream and special schools by primary need in the London Borough of Merton⁷⁸

Primary Need	2008	2009	2010	2011	2012	2013
A S D	0.61	0.09	0.68	0.69	0.69	0.90
B E S D	1.95	1.81	2.20	2.60	2.14	2.01
H I	0.17	0.07	0.10	0.08	0.07	0.07
M L D	1.32	0.66	1.29	1.17	1.02	1.08
M S I	0.00	n/a	0.00	0.01	0.01	0.02
O T H	0.20	0.12	0.19	0.17	0.13	0.11
P D	0.23	0.08	0.25	0.23	0.19	0.20
P M L D	0.26	n/a	0.25	0.24	0.25	0.19
S L C N	1.89	1.27	1.95	2.00	1.98	2.04
S L D	0.21	0.05	0.23	0.22	0.25	0.32
S P L D	0.83	0.79	0.91	0.99	0.95	0.91
V I	0.08	0.03	0.07	0.09	0.07	0.03

Number of pupils with statements of SEN maintained by the London Borough of Merton that attend an out of borough placement⁹¹⁰

SEN2 Year	2008	2009	2010	2011	2012	2013
Out of borough	176	151	141	135	154	156
Total statements	967	922	885	894	925	986
Out of borough %	18.2	16.4	15.9	15.1	16.6	15.8

Glossary of SEN Primary Need

B E S D (Behaviour, emotional and social difficulties), H I (Hearing Impaired), M L D (Moderate learning difficulties) M S I (Multi sensory impairment), O T H (Other) P D (Physical disability) P M L D (Profound & Multiple Learning Difficulties) S L C N (Speech Language and Communication Needs), S L D (Severe Learning Difficulties) S P L D (Specific learning difficulties) V I (Visually impaired)

⁴ Source: LBM SEN2 Returns 2008-2013

⁵ High Needs in this report are defined as pupils with statements of SEN that attend a specialist school, additionally resourced provision or alternative provision (including maintained, academies, independent and non maintained settings)

⁶ Source: LBM SEN2 Returns 2008-2013

⁷ Source: Spring School Census 2008-2013

⁸ Primary Need is recorded on the School Census for pupils on School Action Plus and statement of SEN only

⁹ Source: LBM SENDIS Strategy 2008-2020, Phase Six Proposals 2013-15 January 2013.

¹⁰ In this report out of borough refers to state funded specialist placements located outside the borough of Merton and all independent and non maintained schools)

