

ITEM NO: 7

Report To:	STRATEGIC PLANNING AND CAPITAL MONITORING PANEL
Date:	9 September 2013
Executive Member/ Reporting Officer:	Councillor Gerald P Cooney – Executive Member, Learning Skills and Economic Growth Elaine Todd – Assistant Executive Director for Asset Management and Investment Partnership.
Subject:	EDUCATION CAPITAL PROGRAMME - UPDATE AND TARGETED BASIC NEED BID OUTCOME
Report Summary:	This report is intended to advise members of outcome of the Targeted Basic Need bid submissions and the implications arising from the successful applications and in addition general updates in respect of Education Capital expenditure.
Recommendations:	<p>That members of the Strategic Capital Panel the contents of the report and approve in principle the allocation of:</p> <ul style="list-style-type: none">• £1,677,925 Targeted Capital Funding to Extend Samuel Laycock School plus £75,000 project management fees;• £150,000 Targeted Capital Funding project management fees to progress the design and construction of the new Ashton Primary School;• £150,000 Targeted Capital project management fees to progress the new Hattersley, Hyde primary school;• Temporary allocations from the capital programme to pay for the demolition of the former high school buildings, pending the realisation of capital receipts from the disposal of these sites;• £41,224,58 additional Education capital funding to deliver the schemes in Table 4 and £2,284,633.36 Education capital funding to deliver the schemes in Table 5.
Links to Community Strategy:	The proposals contained in this report will support the delivery of the community strategy.
Policy Implications:	In line with current policy.
Financial Implications: (Authorised by the Borough Treasurer)	<p>The Department for Education has allocated a total of £8.302 million capital grant for the three projects to extend Samuel Laycock School and establish a new primary school in both Ashton under Lyne and Hattersley, Hyde, plus a total of £375,000 for the project management of the capital projects.</p> <p>The Council is also required to make provision in their growth funds to support general increases in pupil numbers relating to basic need. This relates to the per-pupil revenue funding and in addition to all funding for pre-opening development costs and post-opening funding required to address diseconomies of scale; until a school, reaches full capacity. This is because the new</p>

academy or free school will be funded on a recoupment basis. School funding arrangements allow the Council to retain funding centrally to cover these costs.

Local authorities are expected to work with selected proposers to agree a reasonable and mutually acceptable funding allocation from the Local Authority, to cover pre and post opening costs. The Department will provide a one-off payment of £25,000 to the successful proposer for the legal costs associated with establishing a new academy/free school. Upon opening, the school will be funded by the EFA on the same basis as other academies and free schools in the same Local Authority area.

Legal Implications:
(Authorised by the Borough Solicitor)

The Council has a statutory duty under the Education Act 2011, to secure sufficient and suitable places for pupils in its area in primary and secondary schools across the borough. It also has the responsibility for the maintenance of community and voluntary aided school buildings, even though it does not own voluntary aided school buildings. The Council, schools and academies receive funding from the Department of Education (DfE) for maintenance of schools, however in the future it appears that Basic Need funding will be targeted through the Council.

The implementation of the Core Strategy is anticipated that 11,000 additional homes will be created over the next 15 years, which will increase demand further by an additional estimated 330 places in each year group or the equivalent of six 420 place (2 Forms of Entry) Primary Schools. This will have a significant impact on school place planning and investment required in school buildings. The successful bid for Targeted Basic Need capital funding will enable additional provision of primary mainstream places and secondary places for pupils with Autism Spectrum Condition needs.

Risk Management:

These are set out in the report.

Access to Information:

Copies of the Appendices are not provided for any hard copies of the Reports and may be obtained from the website or Democratic Services

Appendix 1: specification inviting potential academy sponsors to submit an expression of interest re New Ashton Primary School

Appendix 2: specification inviting potential academy sponsors to submit an expression of interest re New Hattersley, Primary School

Appendix 3: non statutory DfE guidance for local authorities specifically dealing with the academy presumption process, relating to Targeted Basic Need funded projects

Appendix 4: non statutory DfE guidance on establishing new maintained schools, which is only possible if no suitable Academy Sponsor is identified or a new building replaces an existing school

Appendix 5: A copy of the assessment document for the new

Ashton Primary School

Appendix 6: A copy of the assessment document for the new hattersley/Hyde Primary School

Appendix 7: letter confirming the allocations for all three projects

Appendix 8: Funding Agreement

Appendix 9: copy of Annex B for the new schools is included at

Appendix 10: Annex B for the expansion of Samuel Laycock,

The background papers can be obtained from the author of the report, Elaine Todd, Assistant Executive Director, Economic Growth, Investment and Sustainability. by:



Telephone: 0161 342 3238



e-mail: elaine.todd@tameside.gov.uk

1. INTRODUCTION

- 1.1 The Council has a statutory duty under the Education Act 2011, to secure sufficient and suitable places for pupils in its area, in primary, secondary and special schools across the borough. The DfE provides some capital funding for maintenance and basic need (additional places) but it no longer provides funding for suitability. Maintenance and basic need funding is not ring fenced, so a Local Authority can vire funding to support the provision of additional places if it chooses to do so.
- 1.2 The Council has been very successful in attracting funding for new and remodelled schools, over the last 15 years with a significant number of schools being entirely rebuilt or significantly remodelled, with Astley, Cromwell and Russell Scott about to receive investment and four replacement primary schools at Holden Clough, Silver Springs Academy, Broadoak and Flowery Field, through the Priority School Building Programme, which is being delivered centrally by the Department for Education (DfE). The Priority School Building Programme is now being fast tracked with Flowery Field Primary School, being chosen as a sample school, which could see construction start as early as April 2014. The new schools will provide an additional 525 primary school places in total, across all year groups.
- 1.3 The demand for primary places continues to increase year on year, although the birth rate has seemed to stabilise over the last two years, it is predicted that there will be further increases until 2016, which means that demand for primary places will peak in 2020. However, the increase in demand experienced in the primary sector will start to feed through the secondary schools, which will mean that by 2018, we will need to have increased the number of places across the borough, unless there is one or more free schools or new academies established.
- 1.4 On 1 March 2013, the Secretary of State announced details of the capital funding of around £4 billion that will be made available nationally, to create new school places. The Council's share of this was £6,172,183. The Secretary of State also announced details of the Targeted Basic Need bidding opportunity which will provide additional investment of £982 million for schools in England over the remainder of this Parliament, to deliver high quality school places in the areas that need it most. The programme was intended to offer additional support to those local authorities experiencing the greatest pressure on places and will help them to prepare for further rises in pupil numbers.
- 1.5 As reported to the Executive Cabinet on 27 March 2013, the Council intended to make applications to the DfE for funding from the Targeted Basic Need programme. However, due to the fact that the consultation with responsible bodies had not yet been completed, the details of the applications were not confirmed at that time. The Council's main pressure areas are provision for Autism Spectrum Condition and mainstream primary place provision in Ashton under Lyne and Hyde and were confirmed as the main priorities for the Council.
- 1.6 The report made it clear that the Council would consult with the Asset Management Planning Advisory Group, which includes representatives of all responsible bodies including academies, the Manchester, Chester, Shrewsbury and Salford diocese plus representatives of all education sectors, trade unions, governors forum. The group is chaired by the Executive Member, Learning Skills and Economic Growth.
- 1.7 In the event, none of the responsible bodies submitted any additional applications to the Council, so there was no need to prioritise any other bids and the three following applications were made:
 - An Additional 60 Places for Pupils with Autism Spectrum Condition, to be located at Samuel Laycock School, which Ofsted judged to be Outstanding at their last inspection;;

- A new 420 place school with nursery 26 place full time equivalent nursery, in Ashton under Lyne; and
- A new 210 place school with 13 place fulltime equivalent nursery in Hattersley, Hyde to accommodate increased demand in Hattersley and Godley, Hyde.

1.8 All three applications were approved, in principle, by the Department for Education, on 18 July 2013. This report is intended to update members of the Strategic Capital Panel, with the outcome of the Targeted Basic Need bid submissions and to advise of the implications of the successful applications. A Key Decision will be made to continue the academy presumption process based on the non-statutory guidance, issued by the DfE, to advertise for and propose a preferred sponsor or sponsors to the Secretary of State for Education and to commence the planning, design and construction process for the new and extended school on 28 August 2013.

1.9 In addition, a Key Decision was made on 27 March 2013, approving the allocation of Education Capital Programme funding for a number of projects, with a limited tolerance of 5% additional expenditure and the submission of a final business case for the Astley and Cromwell Building Schools for the Future projects. There have been a number of changes to the capital allocations required to deliver these projects following detailed design and surveys. This report is also intended to update members of the Panel with any changes or new schemes and seek in principle funding for capital funding additional requirements.

2 TARGETTED BASIC NEED BACKGROUND

2.1 On 1 March 2013, the Secretary of State for Education, announced details of the Targeted Basic Need bidding opportunity, which will provide additional investment of £982 million for schools in England, over the remainder of this Parliament, to deliver high quality school places in the areas that need it most. The programme was intended to offer additional support to those local authorities experiencing the greatest pressure on places and will help them to prepare for further rises in pupil numbers.

2.2 The DfE were clear that the programme will provide additional support to those local authorities experiencing the greatest pressure on places, through the funding of new Academies and Free Schools, as well as enabling investment, to permanently expand good and outstanding schools with high levels of demand.

2.3 Local authorities have a statutory responsibility for providing sufficient and suitable school places in their area and they are responsible for providing capital funding to meet the identified need, for high quality places in their area.

2.4 As reported to the Executive Cabinet, in order to be successful, the Council needed to provide evidence of basic need to support proposals for new pupil places that meet the needs of pupils, parents and communities. All Local Authorities could apply for funding but those with significant, additional, proportionate levels of basic need pressures, were encouraged to apply for funding. The programme is intended to be delivered in two phases:

- **Stage 1** – Submission of a bid for capital funding to establish a new Academy or Free School or permanently expand existing high quality provision, on a site provided by the Council, to address basic need pressures. Local authorities will be responsible for the procurement and building of the new places. A provisional funding allocation will be awarded to successful bids for new schools. Funding for the expansion of good and outstanding schools will not be provisional.
- **Stage 2** – Local authorities advertise for and identify their preference for proposer(s) to establish high quality new schools and make recommendations to the Secretary of

State. Funding is allocated upon approval of quality proposals. The Secretary of State will make the final decision as to the chosen sponsor for the new schools.

- **Timetable** - It is anticipated that the first additional pupil places under this programme will be available from September 2014, with the remainder being available from September 2015. Completed applications had to be submitted by 12.00 noon on Tuesday, 30 April 2013. Any applications received after this deadline, were not considered.

2.5 No requests were made by any responsible bodies, including the Academy Trusts or the Dioceses in Tameside, to be included in any application. As reported to Executive Cabinet meeting in 27 March 2013, the main pressures for demand in Tameside are provision for pupils with special educational needs, particularly those with Autism Spectrum Condition, to address the need to provide in borough provision for approximately 30 pupils at Key Stage 3 and 4, who are currently educated out of borough and additional primary school places in Ashton under Lyne and Hyde.

2.6 The three applications that seemed to meet the DfE criteria most closely were:

- An Additional 60 Places for Pupils with Autism Spectrum Condition, to be located at Samuel Laycock School, which Ofsted judged to be Outstanding;
- A new 420 place school with nursery in Ashton under Lyne; and
- A new 210 place school with nursery in Hattersley, to accommodate pupils increases in Hattersley and Godley.

2.7 The above applications were approved by the Asset Management Planning Advisory Group and schools were consulted on the proposed bids, although due to the Easter break and the short deadline only for a period of a week. Only one response was received from Rosehill Methodist Primary School, who were concerned about the impact of pupil intake at their school as a result of the application for a new school in Ashton under Lyne.

2.8 The Council were notified on 18 July 2013 that all three applications for funding, had been successful via the DfE website but no further information was provided.

2.9 Since the application was submitted, discussions with Pinfold Primary School indicated that the school would be willing to expand the school to provide the additional 210 places rather than establish a new school. The school already has capacity for the nursery places that would be required and two classrooms that could be made available. A request was submitted to the DfE to ask them to consider allocating funding to expand Pinfold, which is a Good school as rated by Ofsted and already has an Order, approving conversion to academy status. The proposal would deliver better value for money and would provide a more flexible solution for the provision of the additional places as the school would be able to intake from all years not just incrementally from reception year by year.

2.10 The Department notified the Council on 31 July 2013 that it could not approve the proposed change of project and that approval could only be given for the establishment of a new school in Hattersley, in line with the original application. The site identified for the new school runs parallel to Hare Hill Avenue in Hattersley and appears to be best accessed at the moment via Porlock Avenue.

2.11 On 26 July 2013, the Academies division contacted the Council, to inform officers that in respect of the New Ashton Primary School, a specification inviting potential academy sponsors to submit an expression of interest must be published, by 2 August 2013. The specification is included within this report at **Appendix 1**. Following the decision by the DfE that the original proposal to establish a new 210 place primary school in Hattersley, Hyde a specification for the new school was also published which is also contained within this

report at **Appendix 2**. A copy of both submissions, have been sent to the DfE and are on the Council's website.

- 2.12 Additional non statutory guidance has been drafted for local authorities specifically dealing with the academy presumption process, relating to Targeted Basic Need funded projects, a copy of which is included at **Appendix 3** and also advice on establishing new maintained schools, which is only possible if no suitable Academy Sponsor is identified or a new building replaces an existing school. This guidance is included at **Appendix 4**.

3 ACADEMY PRESUMPTION FOR NEW SCHOOLS

- 3.1 The Education Act 2011, changed the arrangements for establishing new schools and introduced Section 6A, (the academy / free school presumption) to the Education and Inspections Act 2006. Where a local authority thinks there is a need for a new school in its area, it must seek to establish an Academy or Free School. Section 6A came into force:

- On 1 February 2013 for new schools other than pupil referral units; and
- On 1 September 2013, for pupil referral units.

- 3.2 The DfE, also issued non statutory advice on 18 July 2013, setting out the Department's expectation of how the academy / free school presumption should operate in practice and the characteristics that new school proposers should demonstrate, including those that are funded from the Targetted Basic Need programme. It advised the Council on 26 July 2013, that the specification for the new school must be issued to prospective sponsors by 2 August 2013.

- 3.3 The Secretary of State will only consider entering into a funding agreement with an approved sponsor. New proposers will need to be assessed by the Department, through the normal sponsor approval process. Local authorities have been recommended to make it clear that proposers who are not known to the department, will have to go through this process and should contact the Department for Education at the outset and certainly before submitting an Expression of Interest to the local authority.

- 3.4 It will be for Local Authorities to decide how to consult on the proposed new schools and with whom (e.g. other schools, academies, the wider community, diocese and any others affected by the proposals). They should be clear from their school place planning about the type (e.g. mainstream, special educational needs, PRU), age range, gender and capacity of the academy/free school they wish to see established, and the expected cost. The Council has already consulted with representatives of all school sectors, unions, Governor's Forum, Academies, Voluntary Aided Schools and diocese, through the Asset Management Planning Advisory Group and also directly with schools.

- 3.5 As part of the planning process for new schools, Local Authorities must also undertake an assessment of impact of the proposal, both on other existing educational institutions locally and in terms of impact on particular groups of pupils from an equalities perspective. This is to enable the Secretary of State to meet his duties under section 9 of the Academies Act 2010 and under section 149 of the Equality Act 2010. Most Local Authorities will already do this, so in practice it will just be a matter of providing the Secretary of State with a copy of their assessment. However, in the unlikely event that the Secretary of State has concerns about the level of analysis, he reserves the right to ask a Local Authority to undertake further work on their assessment. A copy of the assessment document for the new Ashton Primary School is included at **Appendix 5** and for the new Hyde Primary School at **Appendix 6**.

- 3.6 Local Authorities must take all necessary steps, to ensure that the widest possible range of groups or organisations that might be interested in establishing the new school are aware

of the opportunity to do so, including any local 'outstanding' schools who are already academies or other potential proposers that might be interested in applying to run the school.

- 3.7 The potential sponsors that officers are aware of operating in the local area are:
- Great Education Academies Trust (New Charter), current sponsor of New Charter Academy, Copley High School and Silver Springs Primary Academy;
 - Tameside College, current sponsor of Droylsden Academy;
 - The Methodist Academies Trust who are a national sponsor and have shown an interest in the new Ashton Primary School;
 - The Enquire Learning Trust – sponsor of Hawthorns Primary School to convert by 1.9.2013;
 - Andrew Morley, approved sponsor of Pinfold and Arundale schools, no target date for conversion, due to PFI contract affordability and risk transfer issues;
 - Carillion / inspiredspaces, who are part way through the approval process with the DfE;
 - Interserve who operate PFI schools in the Hattersley and Godley area of Hyde, who are also going through the academy sponsorship approval process with the DfE.
- 3.8 There are also a number of schools which have already, converted to Academy status, which were rated Outstanding at their last Ofsted inspection and are eligible to submit an Expression of Interest and these include:
- Denton West End Primary School;
 - Audenshaw High School; and
 - Fairfield High School.
- However, all three schools have recently appointed new headteachers so it is not known what level of interest they will have in operating additional schools.
- 3.9 The Council has written to all of the above potential sponsors, to advise them of the opportunity to submit an Expression of Interest to sponsor the two new schools. Great Education Academies Trust has already confirmed that they will be submitting an Expression of Interest.
- 3.10 The Department will also play a role in generating interest from high quality proposers – by posting details of new academy/free school proposals on its own website, encouraging key stakeholders to do the same and by sign-posting proposals to existing sponsors or potential sponsors who they are aware of, who are keen to operate in our region.
- 3.11 As under the previous new school competition arrangements, the Council is responsible for providing the site for the new school, and meeting all associated capital costs (unless they are successful in bidding for funding from the Targeted Basic Need Programme).
- 3.12 The Council is also required to make provision in their growth funds to support increases in pupil numbers relating to basic need. This relates to the per-pupil revenue funding, in addition to all funding for pre-opening development costs and post-opening funding required to address diseconomies of scale; until a school reaches full capacity. This is because the new academy or free school will be funded on a recoupment basis. School funding arrangements allow the Council to retain funding centrally to cover these costs. This is detailed in full in the 2013-14 School Finance Regulations, which were published in December 2012.
- 3.13 Local authorities are expected to work with selected proposers to agree a reasonable and mutually acceptable funding allocation from the Local Authority, to cover pre and post opening costs. The Department will provide a one-off payment of £25,000 to the successful proposer for the legal costs associated with establishing a new academy/free school. Upon

opening, the school will be funded by the EFA on the same basis as other academies and free schools in the same Local Authority area.

- 3.14 In order to provide more information about the unique opportunity to establish and operate the proposed two new schools in Tameside, an Information Event was held at Dukinfield Town Hall on 12 April 2013.
- 3.15 The event was attended by Great Academies Education Trust, the Owner of Grafton House Independent Primary School, Bright Futures Education Trust, Carillion/ inspiredspaces, due to the relatively short notice and holiday commitments two other sponsors could not attend the event but have indicated that they are interested in progressing their interest further. Tameside College did not attend the event and have declined to submit an Expression of Interest. It is therefore, anticipated that there will be sufficient interest shown in sponsoring the new schools for the Council to run the selection process.
- 3.16 The Council must notify the Secretary of State of any Expressions of Interest received by 23 August 2013, so that he can advise whether or not he has any concerns about a proposer's capability or capacity to deliver the proposals and particularly where he is minded not to enter into a Funding Agreement, with a particular proposer.
- 3.17 The Council will assess all proposals received and send the outcome of the assessment to the Secretary of State. In deciding the proposer with whom he would be prepared to enter into a funding agreement, the Secretary of State will take into account the Council's preference(s). However, although the preference indicated will be a key factor when determining the eventual sponsor, he reserves the right to put in place a proposer of his own choice, particularly where. The intention is to ensure that a new school is always established by the best proposer possible.
- 3.18 The time table for the selection of the successful Academy Sponsor is as follows:

Table 1

Action	Target Date
Announcement of Targeted Basic Need Bidding Round	01.03.2013
Consultation with elected members, schools and responsible bodies	01.03.2013 to 28.4.2013
Submission of Targeted Basic Need Bid	28.04.2013
Announcement of Outcome of Provisional Funding	18.07.2013
DFE Academy Presumption Guidance Issued	18.7.2013
Local Authorities should publish specification inviting proposal to establish new academy or free school	02.08.2013
Local Authorities should alert the DFE to any expressions of interest that they have received from potential proposers.*	23.08.2013
New sponsor approval applications to the DFE	06.09.2013
DFE will provide feedback on expressions of interest	06.09.2013
Selection of shortlist sponsors (3) from Expressions of Interest	13.09.2013
Local Authorities should inform the DFE of all proposals received	04.10.2013
Local Authorities should submit assessment of all proposals received to DFE indicating any preference(s)	18.10.2013
DFE will confirm sponsor and funding allocation for new school.	12.12.2013

4 FUNDING

4.1 The DfE confirmed funding for the three projects on 12 August 2013, as follows:

Table 2

School	Total Capital Funding	2013/2014	2014/2015	Project Support Funding
	£	£	£	£
New Ashton School	4,316,911	1,049,009	3,267,902	150,000
New Hyde School	2,307,887	560,817	1,747,071	150,000
Samuel Laycock School	1,677,925	407,736	1,270,189	75,000
Total	8,302,723	2,017,562	6,285,162	375,000

4.2 The funding for the two new schools and expansion project at Samuel Laycock. is broadly in line with that anticipated at the bidding stage.

4.3 A copy of the letter confirming the allocations for all three projects is included at **Appendix 7**. A copy of the Funding Agreement is included at **Appendix 8**, a copy of Annex B for the new schools is included at **Appendix 9** and Annex B for the expansion of Samuel Laycock, at **Appendix 10**.

4.4 In order to access the capital grant, a Funding Agreement for each of the projects needs to be signed and submitted by 16 August 2013, together with any request for a revised cashflow.

4.5 Carillion who are the main building sub-contractor for the Tameside Investment Partnership, have already been selected by the EFA, to deliver some of the schools being rebuilt as part of the Priority Schools Building Programme, including Holden Clough Primary School and Silver Springs Primary Academy. The current cost per m2 is being assessed at approximately £1,850, which appears to be within the funding allocated for the new build projects. However, this cannot be confirmed until detailed surveys have been undertaken and design development has taken place.

4.6 Project management fees for the three projects totalling £375,000, has also been allocated.

4.7 Funding Agreement

4.7.1 The Funding Agreement sets out the terms and conditions for the payment by the Secretary of State for Education of a grant to the respective Local Authority out of monies voted by Parliament. 3. The project being funded, including the value of the grant, is described in the Annex B's.

4.7.2 The grant by the Secretary of State will be pursuant to Section 14 of the Education Act 2002 and will accordingly be paid only in respect of approved expenditure incurred by the local authority, for the purpose of delivering the project described in the approval letter.

4.7.3 Payment of grant shall be subject to the conditions and requirements in the Funding Agreement and to such further conditions and requirements that the Secretary of State may from time to time specify. This is a capital grant and thus must be used exclusively for capital expenditure.

4.7.4 The Council is required to deliver the agreed project and responsible for putting in place appropriate information, monitoring and internal reporting systems to secure delivery and

which ensure that the funding provided by the Education Funding Agency (EFA) is spent on the agreed project and in line with the terms and conditions of grant.

- 4.7.5 The Council must seek prior approval from the Secretary of State before committing to additional costs, not covered by the original approval letter. Such approval may be withheld.
- 4.7.6 The approved funding for the relevant financial year should be fully expended by 31 August following the financial year in which the grant is paid. Any underspend or surplus funds after the completion of the projects should be notified and will be subject to reclaim by EFA. It is not intended to allow surplus funding to be used to extend the scope of projects or to deliver other projects.
- 4.7.7 The EFA and/or its representatives will monitor the progress being made in respect of delivering the project. If progress is deemed unsatisfactory or there is significant alteration to the specification and outputs described in the project bid, following discussion with the Local Authority, the EFA and/or its representatives, reserve the right to suspend or withdraw funding for the project.
- 4.7.8 The Council shall follow appropriate legal requirements and best practice in regard to all aspect of this project including (but not limited to) the procurement of goods and services in support of delivering the agreed project, processes for managing the project, governance and internal control systems, managing conflicts of interest and record keeping.
- 4.7.9 The Council is responsible for entering into contracts and agreeing specifications of works that are appropriate to secure the outputs set out in the original project proposal and ensuring that the works undertaken are delivered to quality standards and will have a lasting benefit to the school and community. The EFA will not provide additional funding to rectify substandard work relating to the project.
- 4.7.10 The Council shall ensure that any grant from the Secretary of State is used only in accordance with the terms of this Funding Agreement and on the project described in the associated approval letter. If the Council does not comply with any of the conditions and requirements referred to in the Funding Agreement, or the project does not accord with the original specification, or has not been completed, then the Secretary of State retains the right to stop future funding and by notice in writing require the Local Authority to repay all or any part of grant paid to it under this Funding Agreement.
- 4.7.11 The Section 151 Officer will be required to complete an "End of Financial Year Outturn Certificate", at the end of the financial year. This will confirm that the funds have been applied for the purposes provided, and spent in accordance with the terms and conditions of grant. The EFA will send the "End of Financial Year Outturn Certificate" in the September following the end of the financial year in which the grant is paid with instructions for signature and return.
- 4.7.12 The Council shall consult the Secretary of State if it proposes to dispose of, or change the use of, an asset which has been financed wholly or developed with grant from the Secretary of State or which has been substantially improved by the use of such funds.

5 GENERAL CAPITAL PROGRAMME UPDATE

5.1 The Department for Education announced capital allocations for Tameside on 1 March 2013 as follows:

Table 3

Tameside Capital Allocations	Devolved Formula Capital		Maintenance		Total 2013-14 DFC and Maintenance	Total 2013-14 and 2014-15 Basic Need Two Years
	LA	VA	LA	VA		
	£	£	£	£	£	£
Tameside	490,196	203,839	2,110,809	948,821	3,753,664	6,172,183

5.2 The announced allocations included condition funding for 2013/2014 and Basic Need (funding for additional places) for 2013/2015, This is in addition to the Targeted Basic Need funding.

5.3 The Key Decision on 27 March 2013 approved the following schemes:

Table 4

Premises	Element	Approved Allocation £	Actual / Revised Cost £	Additional Funding Required
Gorse Hall	Roof works	238,617.00	238,617.00	0
Gorse Hall	Path replacement	14,360.78	14,360.78	0
Lyndhurst	Remodelling	70,000.00	33,593.61	0
Wildbank	Electrical works	22,018.00	TBC	0
Millbrook	Roof and hall windows	674,747.60	580,586.62	0
Millbrook	Remodelling			
Millbrook	Extension			
Bradley Green	Roof repairs	19,014.76	19,014.76	0
Godley	New double mobile	259,202.00	259,202.00	0
Ashton West End	Re-wiring design	20,000.00	TBC	0
Ashton West End	Re-wiring works	212,000.00		0
Waterloo	Roof repairs Phase 1	80,780.71	74,493.12	0
Holden Clough	Roof repairs to mobiles	24,690.18	24,690.18	0
Greswell	Roof repairs Block B	184,936.98	184,936.98	0
Greswell	Facias Block A	29,814.64	29,814.64	0
Greswell	Replace class heating	100,000.00	TBC	0
Manor Green	Roof repairs	74,101.11	74,101.11	0
Linden Road	Extraction Fans/Boiler	32,862.00	TBC	0
Linden Road	Internal remodelling 2014	40,000.00	TBC	0

Yew Tree	Internal remodelling	95,000.00	104,830.13	9,830.13
Milton St Johns	Replacement of flooring	30,000.00	TBC	00
Broadoak	Essential electrical and roofing	54,755.62	TBC	0
Broadoak	Essential windows & floors	30,848.00	TBC	
Broadbottom CE	Increase size of Reception class Including school contribution	60,000.00	91,394.45	31,394.45
St John's CE	Internal remodelling	125,000.00	TBC	0
St James' AUL	Roof repairs	87,774.77	87,774.77	0
St Paul's CE	Ceiling and H&S issues	170,000.00	TBC	0
St Paul's RC	Replacement mobile	250,000.00	TBC	0
Stamford	Creation of Bat house	48,000.00	0	0
Stamford	Asbestos Removal	137,194.00	137,194.00	0
Stamford	Demolition	260,000.00	TBC	
Littlemoss	Demolition	102,951.00	102,951.00	
Hartshead	Demolition	185,150.63	185,150.63	
Two Trees	Internal condition and remodelling	258,283.00	258,283.00	0
Dale Grove AUL	Demolition	62,261.63	62,261.63	0
Oakdale	Car park/ access issues	79,925.00	79,925.00	0
Oakdale	Additional classrooms Phase 1	34,877.00	TBC	0
Oakdale	Additional classrooms Phase 2 and 3	19,452.00	19,452.00	0
Dale Grove Hyde	Demolition	91,853.19	91,853.19	0
Total Additional Funding Required				41,224.58

5.4 The demolition costs of the former high schools are proposed to be finance through temporary allocations from the capital programme and repaid through eventual capital receipts.

5.5 In addition to the above changes, in principle allocation of funding is requested for the following projects which will be the subject of an Executive Decision:

5.6 Table 5

Premises	Element	New Allocation£	Notes
Rosehill School	Conversion for 3 bulge classes	273,633.23	The additional places allocated at the schools have already been approved via Key Decisions to be funded from Basic Need
Bradley Green	Chimney repairs	7,000.00	Defects identified during roofworksto be funded from condition
Gee Cross Holt Trinity	Creation of secure entrance	119,984.69	Health and Safety risk – school paying £72,500 towards the costs to be funded from condition

Gorse Hall	Replacement Toilets	74,480.00	School paying 50% towards this scheme to be funded from condition
Waterloo	Roof repairs - Phase 2	65,638.18	Essential roof repairs identified following surveys to be funded from condition
Astley School BSF	Provision of additional demountable	559,096.05	Demountable to be funded from Basic Need to be used for decant during remodelling and then to increase capacity as numbers increase.
Astley School BSF	Asbestos removal	143,000	Asbestos removal required prior to BSF scheme funded initially from condition and then BSF grant
Astley School BSF	Early works required to facilitate BSF remodelling programme	1,041,801.21	Early works required to maintain programme FBC to be submitted w/c 9 September now that scope of scheme is fixed within budget. to be financed initially from condition / basic need funded and BSF grant when released.
Total		2,284,633.36	

6 PROCUREMENT AND PROJECT MANAGEMENT

- 6.1 It is intended to procure and manage all capital projects through the Tameside Investment Partnership, through a Schedule 3 request issued, in accordance with the Strategic Partnering Agreement, in the same way that the Building Schools for the Future and primary capital projects have been delivered.
- 6.2 The management of the projects will be overseen by the Tameside Investment Partnership Board, the Strategic Partnering Board and the Strategic Capital Panel.

7 RISK MANAGEMENT

- 7.1 To mitigate against the risk of having a shortfall in places, the Council has for many years, closely monitored the birth rate increases since 2006 which were approximately 2,500 and have increased to a peak of 3,060, in 2011 and as a result through annual consultation on admission arrangements has delivered sufficient places in the primary sector. The Building Schools for the Future programme was based on projections of birth rates in 2006 and there is likely to be a shortfall of places in 2018. However, this has partly been mitigated by persuading the DfE to establish an additional 150 places (30 in each year group) at Hyde Community School and by the proposals to establish a semi-permanent new classroom block at Astley Sports College.
- 7.2 The implementation of the Core Strategy is anticipated that 11,000 additional homes will be created over the next 15 years, which will increase demand further by an additional estimated 330 places in each year group or the equivalent of six 420 place (Forms of Entry) Primary Schools. This will have a significant impact on school place planning and investment required in school buildings.
- 7.3 The provision of the new places will provide a total of 630 primary places and will contribute towards the cost of 60 high school places for pupils with Autism Spectrum Condition.
- 7.4 The Council will be responsible for delivering the capital projects and supporting the revenue costs of the establishment of any academy school, however, due to the fact that no

capital allocations have been confirmed or levels of revenue support required to be funded from the DSG indicated, it is difficult to assess the level of the financial risk involved.

- 7.5 The Council can set the criteria for a new academy sponsor and submit preferences to the Secretary of State. However, he will take the ultimate decision as to who the selected sponsor will be.
- 7.6 The additional education capital schemes are required to provide sufficient and suitable places and meet health and safety requirements.

8 CONCLUSIONS

- 8.1 The notification of the successful applications for Targeted Basic Need funding is good news, in that additional capital investment will be available to assist the Council with delivering sufficient and suitable places within the Borough. However, there are capital and revenue financial risks connected to the programme, which as yet cannot be fully quantified.
- 8.2 The proposed two schools will be the first completely new schools to be established in Tameside since its creation in 1974, all other new schools have replaced existing provision. It is therefore, especially important that the best sponsor available, is proposed to operate the schools, in order to deliver the Council's objectives for raising standards and aspirations.
- 8.3 The academy presumption process is clear and the timetable challenging. There is potential that the opportunity for further diversification of academy sponsors in the borough will provide challenge and support to further raise standards, although the Council will not have the final choice in a selected sponsor.

8. RECOMMENDATIONS

- 8.1 These are included at the front of the report.

Information pack for potential sponsors



Proposal to establish a new 420-place primary school
with a 26-place full-time equivalent place nursery

Mossley Road, Ashton-under-Lyne, OL6 9SD

Contents

Section		Page
1	Introduction	3
2	Background	4-5
3	Demographics and Local Area	6
4	Education in Tameside	7-9
5	New Ashton Primary and Nursery Proposal	10
6	Tameside Admission Criteria	11-12
7	School Place Planning	13
8	Diversity	14
9	Criteria for Selection of Sponsor	15-17
10	Timetable	18
11	Application Process	19
12	Contact Details	20

1. Introduction

- 1.1 The Secretary of State for Education has notified the Council that in principle, approval has been given to establish a new 420 primary school for pupils aged 4 to 11 with a maintained nursery provision offering 26 full time equivalent places, on an identified site off Mossley Road, in Ashton under Lyne. The capital budget for the new building has yet to be confirmed.
- 1.2 The Council is now seeking expressions of interest from existing and potential academy sponsors, who will commit to meeting and delivering against the Council's ambition to increase the attainment and aspirations for all pupils in Tameside and their families. The Council is passionate that all young people in Tameside should have the best facilities and learning experiences possible. Potential sponsors must have the capacity and capability to deliver against the assessment criteria and to enter a funding agreement with the Secretary of State for Education.
- 1.3 The establishment of a new primary school is being progressed in order to allow the Council to meet its responsibilities to deliver sufficient and suitable places for primary aged pupils within the borough and particularly in Ashton under Lyne. The current increase in demand is due to an increase in the birth rate across the borough since 2006, of over 600 children and also projected increased demand due to planned increases in residential development in the immediate area. Ashton under Lyne is an area where demand for places has significantly increased. It has been managed so far by the creation of one, two or three year bulge classes,
- 1.4 The Council has been successful in attracting capital funding for replacement and new primary schools in the borough, particularly in Ashton under Lyne. Many of the nearby schools, including Rosehill, The Heys and Parochial have all been rebuilt in recent years. Silver Springs Primary Academy, Broadoak and Holden Clough primary schools are being rebuilt through the Priority Schools Building Programme, over the next twelve to eighteen months. The replacement schools will increase permanent capacity by 30 places at Holden Clough and 15 places at Broadoak. St James and Hurst Knoll primary schools are both owned by the Manchester Diocese and were the subject of proposals to close both schools and rebuild a new school in 2010, however, the Diocese declined to support the proposals. Despite the increase in capacity within the new build schools and the creation of temporary bulge classes at The Heys and Rosehill, there is still a projected under supply of places.
- 1.5 The school is intended to be open in September 2015 and will intake nursery and reception classes only, the school population will grow incrementally until it reaches capacity across all years by 2020. The Council will expect any successful proposer to use vacant space within the school in the interim period, by Council officers, subject to ensuring the safeguarding of pupils and other staff. This is to mitigate against the cost of maintaining the additional vacant space and improve the affordability of the operation of the school in the early years. The design of the school will provide sufficient temporary physical separation of access to pupils.

2. Background

- 2.1 The Department for Education, notified the Council on 18 July 2013, that its application for three bids for Targeted Basic Need capital funding, had been successful. One of the applications was to create a new Two Form Entry (420 place school) for pupils aged 4 to 11 and a 26 Full Time Equivalent place nursery, to be located on an identified site off Mossley Road, Ashton under Lyne, Tameside, which was a former high school playing field. The submission was made to the department, in order to meet the growing demand for primary pupil places in Ashton under Lyne.
- 2.2 The Education Act 2011, changed the arrangements for establishing new schools and introduced Section 6A, (the academy / free school presumption) to the Education and Inspections Act 2006. Where a local authority thinks there is a need for a new school in its area, it must seek to establish an Academy or Free School. Section 6A came into force:
- I. On 1 February 2013 for new schools other than pupil referral units; and
 - II. On 1 September 2012, for pupil referral units.
- 2.3 The Department for Education, also issued non statutory advice on 18 July 2013, setting out the Department's expectation of how the academy / free school presumption should operate in practice and the characteristics that new school proposers should demonstrate, included those that are funded from the Targeted Basic Need programme. It advised the Council on 26 July 2013, that the specification for the new school must be issued to prospective sponsors by 2 August 2013.
- 2.4 The Council is responsible for providing the site, meeting all associated capital costs, through the Targeted Basic Need programme and the Department for Education has indicated that they will confirm capital funding for the new school by December 2013.
- 2.5 The Council is required to make provision in our growth fund to support increases in pupil numbers relating to basic need. This relates to the per pupil revenue funding, in addition to funding pre and post opening development costs and post opening funding to address diseconomies of scale until a school reaches full capacity. This is because the new academy or free school will be funded on a recoupment basis. School funding arrangements allow local authorities to retain funding centrally to recover these costs associated with establishing the new school. The Department has not given any indication as to what these funding levels should be, therefore a mutually acceptable funding allocation needs to be agreed between the Council and the selected sponsor.
- 2.6 The Department for Education will provide a one off payment of £25,000 to the successful proposer for the legal costs associated with establishing a new academy / free school. Upon opening, the school will be funded by the Education Funding Agency on the same basis as other academies or free schools in the area.
- 2.7 The Secretary of State will only consider entering into a funding agreement with an approved sponsor. New proposers will need to be assessed by the department through the normal sponsor approval process. Local authorities have been recommended to make it clear that proposers who are not known to the department, will have to go through this process and should contact the Department for Education at the outset and certainly before submitting a proposal to the local authority.

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- 2.8 The local authority must notify the Secretary of State of any expressions of interest received by 23 August 2013, so that he can advise whether or not he has any concerns about a proposer's capability or capacity to deliver the proposal and particularly where he is minded not to enter into a Funding Agreement with a particular proposer.
- 2.9 The Local Authority will assess all proposals received and send the outcome of the assessment to the Secretary of State. In deciding the proposer with whom he would be prepared to enter into a funding agreement, the Secretary of State will take into account the Council's preference(s). However, although the preference indicated will be a key factor when determining the eventual sponsor, he reserves the right to put in place a proposer of his own choice, particularly where. The intention is to ensure that a new school is always established by the best proposer possible.

3. Demographics and Local Area

- 3.1 Tameside is at the heart of the country's second largest regional centre and is an attractive place to live, mid-way between the Pennines and the city of Manchester. It combines a mix of urban and rural landscapes and the area includes historic market towns, a canal network and industrial heritage areas.
- 3.2 Tameside was created in 1974, following local government reorganisation brings together nine towns of Ashton-under-Lyne, Hyde, Audenshaw, Droylsden, Dukinfield, Denton, Stalybridge, Mossley and Longdendale. Schools were previously under the administration of Lancashire and Cheshire.
- 3.3 Ashton-under-Lyne has been a market town for over 700 years, Mottram dates back to Norman times with 14th century development in Hyde and Tudor buildings in Denton and Stalybridge. It was during the Industrial Revolution, however, that small, rural settlements grew into thriving centres of commerce based mainly on cotton but also woollens, coal mining and metal trades.
- 3.4 Tameside has a strong manufacturing tradition, particularly in the areas of textiles and engineering, food industries and manufacturing of high technology chemical, electronic and computer products. The borough's service sector has also experienced continued growth and service industries now make up the largest employment sector in Tameside. This has meant that there has been a trend of relatively low unemployment but also relatively low pay. The raising of both aspirations and attainment of young people and their families, from an early age is key to encouraging more young people to seek employment in a wider scope of professions and careers, as manufacturing continues to decline.
- 3.5 In June 2013, 4.6% of the working age population in Tameside were claiming Job Seekers Allowance. This is in line with the figure for Greater Manchester (4.5%) and above the average for England (3.4%). However, there are pockets of higher unemployment in the borough, which are the focus of policies and programmes.
- 3.6 There is a wide range of housing available, both rented and for owner-occupation in both urban areas and country towns. Additional residential developments of over 10,000 houses are needed over the next ten years to meet projected demand. It is partly the construction of these properties concentrated near to the proposed new school site that will drive and sustain the need for the additional places.
- 3.7 The current (2012) estimated population of the Borough is 220,200, comprising 95,000 households and an electorate of around 170,800. Over two-thirds (64.1%) of residential property within the Borough is owner-occupied.
- 3.8 There is a rich mix of different cultures, religions and ethnic groups in Tameside. Around 9.1% of the population are people from ethnic minority backgrounds other than European, including Afro-Caribbean, Bangladeshi, Chinese, East African, Asian, Indian and Pakistani. Other Tamesiders are of Irish, Italian, Polish or Ukrainian backgrounds.
- 3.9 There is considerable voluntary activity across the borough with around 800 organisations, concerned with social welfare, the environment, arts and leisure. There are also a number of successful credit unions and other community based and co-operative developments operating in the borough.
- 3.10 Tameside has strong twinning links across the world, all maintained by the enthusiasm and hard work of voluntary committees. The 40-year link between Stalybridge and Armentieres in Northern France has won the Royal Mail National Twinning Award. German, Zimbabwean, Chinese and Irish towns also twin with those in Tameside. Many schools in Tameside take an active part in maintaining and strengthening these links.

4. Education in Tameside

- 4.1 The Council is committed to securing high quality education, for all pupils through a working partnership between elected members, school governors, headteachers, teachers and support staff and parents. There are well established groups for consulting on new policy developments and user groups for monitoring the quality of service provision. Primary schools main collaborative body is Tameside Primary Headteachers Consortium, primary schools and primary academies are also represented on Schools Forum and other consultative groups. There is an emerging school to school support network.
- 4.2 The early years are crucial to a child's chances of later success. Children who achieve well in their early years are much more likely to be successful in future education and in later life. A recent report confirmed that school readiness in Tameside, which is measured by achievement of at least 78 points across the Early Years Foundation Stage Profile (EYFSP), has improved by 16% in Tameside over the last 7 years however, the rate of improvement was lower than statistical neighbours and national averages.
- 4.3 Summarised below are the key points:
- 59% of children in Tameside achieved at least 78 points in the EYFSP in 2012. This is 5% points below the England rate.
 - The proportion of children achieving at least 78 points in the EYFSP has improved by 16% in Tameside over the last 7 years. This rate of improvement is slower than Statistical Neighbours (22%) and England (33%).
 - The Tameside gap in achievement between the lowest performing 20% and the rest was 31% in 2012. Roughly similar to Statistical Neighbours and England.
 - The rate of improvement in closing the achievement gap is 3% for Tameside. This is slower than Statistical Neighbours (18%) and England (23%).
 - 41% of children were not school ready in Tameside in 2012. Compared to 36% in England.
 - 16 (out of 141) Lower Super Output Areas have 60% or more of children not school ready.
 - There are 'substantial to very strong' correlations between the themes of the High Demand Households analysis and the proportion of children not school ready.
- 4.4 In Tameside, achievement of 78 points has increased by 8% points between 2005 and 2012, from 51% to 59% respectively. This represents an improvement rate of 16%. Statistical Neighbours and England improved at a greater rate, 22% and 33% respectively. Whereas in 2005 performance in Tameside was the same or better than the comparator groups it now lags behind Statistical Neighbours by 3% points and England by 5% points.

4.5 Achievement of 78 points (% achieved) – Tameside, statistical neighbours & national comparison.

	2005	2012	% point change	% change
Tameside	51%	59%	8%	16%
Statistical Neighbours	51%	62%	11%	22%
England	48%	64%	16%	33%
Gap to Statistical Neighbours	Same	3% points worse		
Gap to England	3% points better	5% points worse		

4.6 In the Ashton Hurst Ward, where the new school will be located, 49% or more pupils were not considered ready for school in 2012.

4.7 Primary aged pupils attendance compares well with national and statistical neighbour's averages with 3.9% of days being lost compared to 4.41% nationally.

4.8 Tameside primary schools have maintained and increased their attainment levels at Key Stage 2 (11 years old), over the past 4 years and on average are out-performing the national average. 75% of primary schools are good or outstanding.

Key Stage 2 Results	% achieving Level 4 or above in both English and Maths in				% making expected progress	
	2012	2011	2010	2009	English	Maths
England - all schools	79%	74%	73%	72%	89%	87%
England - state funded schools only	79%	74%	73%	72%	89%	87%
Tameside	82%	76%	74%	73%	92%	90%

4.9 At Key Stage 4, although performance has been consistently improving year on year, continued improvement is a key focus of the Council. The results over that last four years are shown below:

Key Stage 4 Results	% of pupils making expected progress		% achieving 5+ A*-C GCSEs (or equivalent) including English and maths GCSEs				% achieving the English Bacc	% achieving grades A*-C in English and maths GCSEs
	English	Maths	2012	2011	2010	2009		
England - all schools	NA	NA	59.4%	59.0%	53.5%	49.8%	18.4%	60.0%
England - state funded schools only	68.0%	68.7%	58.8%	58.2%	55.2%	50.7%	16.2%	59.3%
Tameside	65.2%	65.5%	56.8%	55.6%	49.7%	45.5%	12.3%	57.3%

4.10 6.6% of 16 to 18 year olds are Not in Education Employment or Training and 11% of the working age population has no skills which is lower than the Greater Manchester average but higher than the national average. Only 44% of the working age population have skills at NVQ Level 3 or equivalent compared to the national average of 55% With only 22% with NVQ Level 4 skills.

4.11 Performance has been improving however only a continual drive to improve the attainment and aspirations from the youngest age possible will make the transformational impact which with support and sustain the regeneration of the borough and improve the quality of life of young people.

5. New Ashton Primary School Proposal

- 5.1 The establishment of a brand new primary school, although not unique, represents an exciting and challenging opportunity, to deliver a new school, with a focus on high aspirations, attainment and personal development to ensure that all pupils leave the school equipped to move on to secondary education, with the maximum potential to succeed.
- 5.2 The high level details of the new school are shown below:

Category	Detail
Address	Mossley Road, Ashton under Lyne, OL6 9SD
Single or Split Site	Single site
Ownership	Tameside MBC – Freehold
Tenure	125 lease to Academy Trust
Area to be serviced	Ashton under Lyne, Hurst Ward
Age Range – Primary School	4 to 11
Age Range – Nursery	Currently 3 year olds
Number of places	420 (60 in each year group) plus a nursery with a full time capacity of 26 places
Special Educational Needs	The new school will serve children with special education needs and/or disabilities for whom mainstream education is considered appropriate.
Gender of Pupils	Boys and Girls
Codes of Practice of Admission and Appeals	All potential sponsors are required to abide by the Codes of Practice on Admissions and Admission Appeals, participate in the Council's co-ordinated scheme for admissions and its In Year Fair Access Protocol.

6. Tameside Admission Criteria

6.1 If an Academy, Community or Voluntary School is Over Subscribed, the following criteria will apply:

1. Looked after Children or children who have previously been looked after but immediately after being looked after became subject to an adoption, residence, or special guardianship order.

A looked after child is a child who is (a) in the care of a local authority, or (b) being provided with accommodation by a local authority in the exercise of their social services functions (see the definition in section 22(1) of the Children Act 1989)

2. Children and families with exceptional medical or social needs.

Written evidence must be provided by a suitably qualified professional – e.g. a GP or consultant for medical needs, or a social worker for social needs – the information must confirm the exceptional medical or social need and demonstrate how the specified school is the only school that can meet the defined needs of the child. A panel of officers from Tameside MBC will make a decision as to whether to admit a child under this criterion, using the evidence provided. Parents and carers are responsible for providing all information in support of an application by the closing date, officers of the Council will not ask for additional information. All information provided will be treated in the strictest confidence.

3. Siblings

This will apply where there are brothers or sisters attending the school or the linked junior school at the time of application, and who will be still be attending at the time of admission – the September when a pupil goes into Reception. Preference will be given to children living nearest to the school.

The sibling criterion includes natural brothers/sisters, half-brothers/sisters, step-brothers/sisters, adopted brothers/sisters, brothers/sisters of fostered children, children of the parent/carer's partner. In each case they must be living at the same address. This allows for the admittance of children whose siblings will still be attending the preferred school.

4. All other applications on distance

Preference will be given to pupils living nearest to the school, taking into account ease of access to, and distance from, alternative schools.

Ease of access will be considered when parents provide details of particular reasons which mean their child could reach the nearest school but would face a disproportionately long journey to another school if denied admission to their nearest school. Details must be provided on the online form.

Definitions for admissions arrangements

Unless stated otherwise in the admissions arrangements, which can be obtained in full from the school or the Tameside Council website – www.tameside.gov.uk – the following definitions will apply:

Definition of distance

Distance will be measured as a straight line from the child's home address, using the address point assigned by the National Land and Property Gazetteer, to the school's main gate. Measurements will be made using the local authority's school admissions data mapping software, which uses a geographical information system based on the Ordnance Survey.

Home address

The address from which distance will be measured is the permanent residential address (at the time of application) of the parent with whom the child normally lives. Where parents have shared responsibility – the child lives with each for part of the week – the home address is the one from which the child travels to school the most during a week. If the number of days is equal, the home address will be that of the parent who receives the child benefit.

Tie-breaker

If a school is over-subscribed within any of the criteria, priority will be given to those children living nearest to the school. In the event of distances being the same for two or more applicants, where the distance would be the last place(s) to be allocated, the place will be allocated to the pupil that is nearer using walking distance as measured using the local authority's school admissions data mapping software.

In cases where twins, triplets, or other multiple birth siblings are split when allocations take place, they will be allocated a place over the Published Admission Number and will remain excepted pupils for the time they are in an infant class or until the class numbers fall back to the current infant class size limit.

- 6.2 The Council's policy is to admit children into the Reception Year in the September following their fourth birthday. As the new school is required to serve the identified need for primary places in the Hurst Ward area of Ashton under Lyne, the Council expects the Academy Sponsor to adopt the same criteria used to determine priority for places at maintained schools as shown above.

7. School Place Planning

- 7.1 The main reason for establishing a new 420 place primary school in Ashton under Lyne is to meet an increasing demand for places.
- 7.2 There are also a number of housing developments planned and in construction in Ashton under Lyne, which dependent on progress, will further increase demand.
- 7.3 As can be seen from the following tables, the total demand for places in almost all schools in Ashton under Lyne for September 2013, exceeds capacity available.

Community and Voluntary Controlled School Name	Published Admission Number 2013	Number on roll in Jan 2013	Number of Requests 2013	Furthest distance at initial allocation (miles) 2013
Ashton West End Primary ,William Street OL7 0BJ	45	306	80	N/A
Broadoak Primary, Norman Road OL6 8QG	45	265	71	N/A
Holden Clough Community Primary Off St Alban's Avenue, OL6 8XN	30	208	78	0.899
Hurst Knoll St James CE Primary Ladbroke Road, OL6 8JS	30	188	59	N/A
Parochial CE Primary Keppel Street OL6 6NN	30	206	84	0.389
Rosehill Methodist Community Primary, Rosehill Road OL6 8YG	90	394	87	N/A
St James CE Primary Romney Street OL6 9HU	30	194	63	N/A
The Heys Primary Whiteacre Road OL6 9NS	60	210	111	N/A
Waterloo Primary Worthington Street OL7 9NA	60	381	94	N/A

Voluntary Aided School Name	Religious Affiliation	Published Admission Number	Number on roll in Jan 2013	Number of Requests 2013
Canon Burrows CE Primary Oldham Road OL7 9ND	CE	60	421	154
Canon Johnson CE Primary Elgin Street OL7 9DD	CE	30	197	110
Holy Trinity CE Primary Kenyon Street OL6 7DU	CE	30	207	45
Our Lady of Mount Carmel RC Primary Holden Street OL6 9JJ	RC	30	211	100
St Christopher's RC Primary St Christopher's Road OL6 9DP	RC	30	206	106
St Peter's CE Primary Oxford Street OL7 0NB	CE	30	195	58

8. Diversity in Tameside

8.1 The Council supports the view that diversity in governance of schools can support the raising of attainment and aspiration of young people in Tameside. We have realigned resources to enable additional challenge to all schools, regardless of their governance with the intention, that young people receive the best support possible. In addition, we have set up a School Performance Board chaired by the Executive Member, responsible for this area of our services, where all governing bodies and trusts will be held accountable.

8.2 It is our policy to support schools seeking academy status whether sponsored or not. There are currently seven high schools that have been set up or have converted to academy status within the borough including:

- New Charter
- Droylsden
- West Hill (Boys)
- Fairfield (Girls)
- Audenshaw (Boys)
- All Saints Roman Catholic College and
- Copley

There are two primary academies:

- Silver Springs and
- Denton West End

8.3 There are also four schools who have had Academy Orders published including Hawthorns, Pinfold and Arundale primary schools and Mossley Hollins High School.

8.4 Six high schools including, Astley, Cromwell, Alder, Longdendale, Denton Community College and Mossley Hollins, have also formed a trust with Ashton 6th Form College known as the A Plus Trust, which has been formed to develop an increase in standards through school to school support and challenge and may in the future become an academy trust.

8.5 The Council is keen to support other schools to convert to Academy status as well as to support the establishment of new schools as academies.

8.6 A summary of the number and type of schools for both primary and secondary are shown below:

Number and Type of Primary School
40 x Community Primary Schools
1 x community junior school
9 x voluntary controlled Church of England primary schools
1 x voluntary controlled Methodist primary school
9 x voluntary aided Church of England primary schools
12 x voluntary aided Roman Catholic primary schools
2 x academy primary schools

Number and Type of High Schools
6 x community high schools
2 x Roman Catholic voluntary aided high schools
7 x Academy schools (including 1 Roman catholic)

9. Criteria for Selection of Academy Sponsor

- 9.1 The Council and the Secretary of State believe that the selection of the most appropriate sponsor is absolutely critical to the future success of the school. Ministers have been clear that they expect that those taking on the role of an academy sponsor, must demonstrate capacity, quality and innovation. The Council and ministers will hold them to account on this basis both in selecting and approving sponsors and on an ongoing basis once the funding agreement has been approved and signed.
- 9.2 Nationally, ministers seek to match sponsors with schools in logical geographical arrangements, and to support sponsors who have the capacity, infrastructure and desire to grow, developing in an effective and sustainable way. Locally, the Council is seeking a sponsor with real commitment and capacity to meet the national criteria but also to provide added value through additional support to staff and pupils at the school and the wider community.
- 9.3 Potential academy sponsors are welcomed from a variety of backgrounds, including a high performing school that has recently converted to academy status, a further education college, an independent school, business leader and entrepreneur, or anyone that can apply their business and educational expertise to transforming opportunities for young people. For further information and guidance about what sponsoring an academy entails, please visit the supporting another school as an academy sponsor section of the DFE website.

9.3.1 Strategic Vision

Potential sponsors are required to:

- articulate clearly their educational vision, ethos, values and objectives for the new school;
- demonstrate how they will ensure high expectations for attainment, aspiration and personal development for all pupils and staff;
- demonstrate how they envisage working with other schools, local partners and the Council to set up the school and during operation;
- demonstrate how they will communicate vision,
- demonstrate how they will monitor and evaluate the quality of teaching and other support provided for pupils with a range of aptitudes and needs, including those who have special educational needs;
- evaluate the school's strengths and weaknesses and use their findings to promote improvement; develop capacity for sustaining improvement by developing leadership;
- capacity and high professional standards among all staff; and ensure that all pupils are safe;
- demonstrate of how the sponsor would work with parents, pupils and the wider community in establishing the academy.

9.3.2 Educational Capacity and Performance

The Council's vision is that all schools and academies in the borough will be Good or Outstanding and that young people should have the absolute best opportunity to learn and succeed. Therefore, potential sponsors will be required to demonstrate:

- who the key education leads responsible for setting up the school will be;
- clear educational aims and objectives;
- evidence of capacity and capability to deliver against targets, whether in an educational or other sector and a track record of success, driving up standards and maintaining improvement;

- how they will monitor and evaluate the quality of teaching and other support provided for pupils with a range of aptitudes and needs, including those who have special educational needs;
- how they will work with pupils and families attending the nursery unit to ensure that the number of children who are ready for school is significantly improved;
- how they will work with the Council to ensure that there is sufficient child care provision within this area of the borough;
- how they will develop and deliver a focussed and coherent education plan, that sets out the key innovations of the school, including the proposed curriculum; the approach to teaching and any particular ethos and how these will combine to achieve improved performance;
- commitment to continually improve teaching and learning, including the management of pupils' behaviour;
- how the anticipated needs of pupils with differing abilities will be met;
- what the proposer's aspirations for pupil achievement are and how they will measure success;
- strong, credible evidence that the school will raise the overall standard of education available in the local area, adding very high quality places to the local area; and
- a strong commitment to providing pupils with additional development opportunities and work experience and career development for pupils at other schools; and
- how they will support the transition for pupils to KS3.

All potential sponsors need to provide details of their proposed teaching and support structure and demonstrate their plans and arrangements for:

- setting engaging and motivating pupils to learn and foster their curiosity and enthusiasm for learning;
- enabling pupils to develop skills in reading, writing, communication and mathematics;
- developing and delivering an exciting, inspiring broad and balanced curriculum that: meets the needs of all pupils; enables all pupils to achieve their full educational potential and make progress in their learning;
- promoting good behaviour and securing pupils' safety and their spiritual, moral, social and cultural development;
- ensuring teachers' expectations are reflected in their teaching and planning, including curriculum planning, and are sufficiently high to extend the previous knowledge, skills and understanding of all pupils in a range of lessons and activities over time;
- facilitating well-judged teaching strategies, including setting challenging tasks matched to pupils' learning needs which successfully engage all pupils in their learning;
- ensuring pupils understand how to improve their learning as a result of frequent, detailed and accurate feedback from teachers following assessment of their learning;
- promoting learning through teachers' questioning and use of discussion;
- maximising the pace and depth of learning through teachers' monitoring of learning during lessons and any consequent actions in response to pupils' feedback;
- developing pupils' knowledge, skills and understanding across a range of subjects and areas of learning;
- enabling pupils to develop the skills to learn for themselves;
- where appropriate, including setting appropriate homework to develop their understanding; and making learning as successful as possible through the appropriate use of Information Communication Technology (ICT) in all areas of the curriculum, and
- through the analysis of pupils' performance data to monitor their progress and plan appropriate provision for individuals and groups.

9.4 Governance and Transparency

Potential sponsors are required to:

- provide a structure clearly showing the governance structure and lines of accountability proposed for the New Ashton Primary and Nursery School and how it links to each academy it sponsors or plans to sponsor, in order to demonstrate how you will hold the academy to account. Links to any other organisations should also clearly be shown;
- Potential sponsors will be required to confirm who will be responsible for attainment at the academy and how this will be managed. The Council will be holding academies and schools to account in respect of school improvement and attainment.
- indicate whether or not they are interested in sponsoring any other schools in Tameside. The Council is keen to support schools, particularly primary schools to convert to Academy status.

9.5 Financial Planning and Operational Efficiency

Potential sponsors are required to:

- details of the financial performance of your organisation and any sponsored academies over the last three financial years, showing expenditure, and income budgets, together with actual expenditure, income, and surplus or deficits;
- evidence of sound budget management should be provided, including details of who will be ultimately responsible for the pre and post financial operation of the academy;
- information detailing added value that their organization will provide for the new school in terms of financial and non-financial resources;
- provide details of resources that they will make available pre and post opening costs. Potential sponsors are required to provide details of resources that they will make available; and.
- evidence of capacity to deliver this project on time, to secure best value for money, and to maintain financial viability. The proposer's financial plans should be consistent with the rest of their application, for example, in terms of staffing, pupil numbers and the education plan. They should be based on realistic assumptions about income and expenditure, and demonstrate that allowance has been made for unforeseen contingencies.

10. Timetable

10.1 The timetable for the selection of a sponsor for the proposed academy has been set by the Secretary of State for Education and is as follows:

Action	Target Date
Announcement of Targeted Basic Need Bidding Round	01.03.2013
Consultation with elected members, schools and responsible bodies	01.03.2013 to 28.4.2013
Submission of Targeted Basic Need Bid	28.04.2013
Announcement of Outcome of Provisional Funding	18.07.2013
DFE Academy Presumption Guidance Issued	18.7.2013
Local Authorities should publish specification inviting proposal to establish new academy or free school	02.08.2013
Information Event	12.08.2013
Interested parties must confirm that they will be submitting an Expression of Interest by 12 noon	23.08.2013
Local Authorities to inform the DFE of any expressions of interest that they have received from potential proposer*	23.08.2013
Expression of Interest to be submitted 12 noon	06.09.2013
New sponsor approval applications to the DFE	06.09.2013
DFE will provide feedback on expressions of interest	06.09.2013
Selection of shortlist sponsors from Expressions of Interest	13.09.2013
Local Authorities to inform the DFE of all proposals received	04.10.2013
Local Authorities to submit an assessment of all proposals received to DFE indicating any preference(s)	18.10.2013
DFE will confirm sponsor and funding allocation for new school	12.12.2013

11. Application Process

- 11.1 An information event will be held in at Dukinfield Town Hall, King Street, Dukinfield, Tameside SK16 4LA, from 10.00am to 12 noon. Potential proposers do not need to attend the event to be part of the process, however, it is an additional opportunity for you to find out more about the proposals.
- 11.2 Potential proposers should confirm that they will be submitting an Expression of Interest, no later than **12 noon on 23 August 2013**, to enable the Council to advise the Secretary of State of the interest parties his deadline of 23 August 2013. Confirmation should be sent via email to: Newashtonprimaryacademy@tameside.gov.uk.
- 11.3 Completed Expressions of Interest should be submitted by no later than **12 noon on 6 September 2013**. All applications should be submitted via email to Newashtonprimaryacademy@tameside.gov.uk.

12. Contact Details

12.1 The contact details for this application are:

Elaine Todd

Assistant Executive Director

Asset and Investment Partnership Management

Email: elaine.todd@tameside.gov.uk or Tel: 0161 342 3238

Heather Loveridge

Interim Head of Education Services

Email: heather.loveridge@tameside.gov.uk or Tel: 0161 342 2050

Catherine Moseley

Head of Access and Inclusion

Email: catherine.moseley@tameside.gov.uk or Tel: 0161 342 3302

Information pack for potential sponsors



Proposal to establish a new 210-place Primary Academy with a 13 full-time equivalent place Nursery in Hyde

Contents

Section		Page
1	Introduction	3
2	Background	4-5
3	Demographics and Local Area	6
4	Education in Tameside	7-8
5	New Hyde Primary and Nursery Proposal	9
6	Tameside Admission Criteria	10-11
7	School Place Planning	12
8	Diversity	13
9	Criteria for Selection of Sponsor	14-17
10	Timetable	18
11	Application Process	19
12	Contact Details	20

1. Introduction

- 1.1 The Secretary of State for Education has notified the Council that in principle, approval has been given to establish a new 210 primary school for pupils aged 4 to 11 with a maintained nursery provision offering 13 full time equivalent places, in the Hattersley, Hyde area of Tameside. The capital budget for the new building has yet to be confirmed by the Department for Education but will be advised by December 2013.
- 1.2 The Council is now seeking Expressions of Interest from existing and potential academy sponsors, who will commit to meeting and delivering against the Council's ambition to increase the attainment and aspirations for all pupils in Tameside and their families. The Council is passionate that all young people in Tameside should have the best facilities and learning experiences possible. Potential sponsors must have the capacity and capability to deliver against the assessment criteria and to enter a funding agreement with the Secretary of State for Education.
- 1.3 The establishment of a new primary school is being progressed in order to allow the Council to meet its responsibilities to deliver sufficient and suitable places for primary aged pupils, within the borough and particularly in Hattersley and Godley, Hyde. The current increase in demand is due to an increase in the birth rate across the borough since 2006, of over 600 children and also projected increased demand due to planned increases in residential development and regeneration of the immediate area. Hattersley and Godley in Hyde, are in an area where demand for places is projected to significantly increase. It has been managed so far by the creation of bulge classes, but this is unsustainable as a permanent solution.
- 1.4 The Council has been successful in attracting capital funding for replacement and remodeled primary and secondary schools in the borough, particularly in the Hyde area. Many of the nearby schools, including Arundale, Pinfold, Leigh and Greenfield primary schools and Alder Community High School, Hyde Community College and Thomas Ashton School are recent new builds; Gee Cross, Godley and Broadbottom, have had significant remodeling programmes and Flowery Field Primary School will be rebuilt as part of the Priority Schools Building Programme, over the next twelve to eighteen months. The replacement building will increase permanent capacity by 30 places at Flowery Field Primary School.
- 1.5 The school is intended to be open in September 2015 and will intake nursery and reception classes only, the school population will grow incrementally until it reaches capacity across all years by 2020. The Council may require any successful proposer to permit use of the vacant space within the school in the interim period, by Council officers, subject to ensuring the safeguarding of pupils and other staff. This is to mitigate against the cost of maintaining the additional vacant space and improve the affordability of the operation of the school in the early years. The design of the school will provide sufficient temporary physical separation of access to pupils.

2. Background

- 2.1 The Department for Education, notified the Council on 18 July 2013, that its application for three bids for Targeted Basic Need capital funding, had been successful. One of the applications was to create a new One Form Entry (210 place school) for pupils aged 4 to 11 and a 13 Full Time Equivalent place nursery, to be located in Hyde. The submission was made to the department, in order to meet the growing demand for primary pupil places in Hattersley and Godley in Hyde.
- 2.2 The Education Act 2011, changed the arrangements for establishing new schools and introduced Section 6A, (the academy / free school presumption) to the Education and Inspections Act 2006. Where a local authority thinks there is a need for a new school in its area, it must seek to establish an Academy or Free School. Section 6A came into force:
- I. On 1 February 2013 for new schools other than pupil referral units; and
 - II. On 1 September 2012, for pupil referral units.
- 2.3 The Department for Education, also issued non statutory advice on 18 July 2013, setting out the Department's expectation of how the academy / free school presumption should operate in practice and the characteristics that new school proposers should demonstrate, included those that are funded from the Targeted Basic Need programme. It advised the Council on 26 July 2013, that the specification for the new school must be issued to prospective sponsors by 2 August 2013.
- 2.4 The Council is responsible for providing the site, meeting all associated capital costs, through the Targeted Basic Need programme and the Department for Education has indicated that they will confirm capital funding for the new school by December 2013.
- 2.5 The Council is required to make provision in our growth fund to support increases in pupil numbers relating to basic need. This relates to the per pupil revenue funding, in addition to funding pre and post opening development costs and post opening funding to address diseconomies of scale until a school reaches full capacity. This is because the new academy or free school will be funded on a recoupment basis. School funding arrangements allow local authorities to retain funding centrally to recover these costs associated with establishing the new school. The Department has not given any indication as to what these funding levels should be, therefore a mutually acceptable funding allocation needs to be agreed between the Council and the selected sponsor.
- 2.6 The Department for Education will provide a one off payment of £25,000 to the successful proposer for the legal costs associated with establishing a new academy / free school. Upon opening, the school will be funded by the Education Funding Agency on the same basis as other academies or free schools in the area.
- 2.7 The Secretary of State will only consider entering into a funding agreement with an approved sponsor. New proposers will need to be assessed by the Department through the normal sponsor approval process. Local authorities have been recommended to make it clear that proposers who are not known to the department, will have to go through this process and should contact the Department for Education at the outset and certainly before submitting a proposal to the local authority.

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- 2.8 The local authority must notify the Secretary of State of any expressions of interest received by 23 August 2013, so that he can advise whether or not he has any concerns about a proposer's capability or capacity to deliver the proposal and particularly where he is minded not to enter into a Funding Agreement with a particular proposer.
- 2.9 The Local Authority will assess all proposals received and send the outcome of the assessment to the Secretary of State. In deciding the proposer with whom he would be prepared to enter into a funding agreement, the Secretary of State will take into account the Council's preference(s). However, although the preference indicated will be a key factor when determining the eventual sponsor, he reserves the right to put in place a proposer of his own choice. The intention is to ensure that a new school is always established by the best proposer possible.

3. Demographics and Local Area

- 3.1 Tameside is at the heart of the country's second largest regional centre and is an attractive place to live, mid-way between the Pennines and the city of Manchester. It combines a mix of urban and rural landscapes and the area includes historic market towns, a canal network and industrial heritage areas.
- 3.2 Tameside was created in 1974, following local government reorganisation brings together nine towns of Ashton-under-Lyne, Hyde, Audenshaw, Droylsden, Dukinfield, Denton, Stalybridge, Mossley and Longdendale. Schools were previously under the administration of Lancashire and Cheshire.
- 3.3 Ashton-under-Lyne has been a market town for over 700 years, Mottram dates back to Norman times, with 14th century development in Hyde and Tudor buildings in Denton and Stalybridge. It was during the Industrial Revolution, however, that small, rural settlements grew into thriving centres of commerce based mainly on cotton but also woollens, coal mining and metal trades.
- 3.4 Tameside has a strong manufacturing tradition, particularly in the areas of textiles and engineering, food industries and manufacturing of high technology chemical, electronic and computer products. The borough's service sector has also experienced continued growth and service industries now make up the largest employment sector in Tameside. This has meant that there has been a trend of relatively low unemployment but also relatively low pay. The raising of both aspirations and attainment of young people and their families, from an early age is key to encouraging more young people to seek employment in a wider scope of professions and careers, as manufacturing continues to decline.
- 3.5 In June 2013, 4.6% of the working age population in Tameside were claiming Job Seekers Allowance. This is in line with the figure for Greater Manchester (4.5%) and above the average for England (3.4%). However, there are pockets of higher unemployment in the borough, which are the focus of policies and programmes.
- 3.6 There is a wide range of housing available, both rented and for owner-occupation in both urban areas and country towns. Additional residential developments of over 10,000 houses are needed over the next ten years to meet projected demand. It is partly the construction of these properties concentrated near to the proposed new school site that will drive and sustain the need for the additional places.
- 3.7 The current (2012) estimated population of the Borough is 220,200, comprising 95,000 households and an electorate of around 170,800. Over two-thirds (64.1%) of residential property within the Borough is owner-occupied.
- 3.8 There is a rich mix of different cultures, religions and ethnic groups in Tameside. Around 9.1% of the population are people from ethnic minority backgrounds other than European, including Afro-Caribbean, Bangladeshi, Chinese, East African, Asian, Indian and Pakistani. Other Tamesiders are of Irish, Italian, Polish or Ukrainian backgrounds.
- 3.9 There is considerable voluntary activity across the borough with around 800 organisations, concerned with social welfare, the environment, arts and leisure. There are also a number of successful credit unions and other community based and co-operative developments operating in the borough.
- 3.10 Tameside has strong twinning links across the world, all maintained by the enthusiasm and hard work of voluntary committees. The 40-year link between Stalybridge and Armentieres in Northern France has won the Royal Mail National Twinning Award. German, Zimbabwean, Chinese and Irish towns also twin with those in Tameside. Many schools in Tameside take an active part in maintaining and strengthening these links.

4. Education in Tameside

4.1 The Council is committed to securing high quality education, for all pupils through a working partnership between elected members, school governors, headteachers, teachers and support staff and parents. There are well established groups for consulting on new policy developments and user groups for monitoring the quality of service provision. Primary schools main collaborative body is Tameside Primary Headteachers Consortium, primary schools and primary academies are also represented on Schools Forum and other consultative groups. There is an emerging school to school support network.

4.2 The early years are crucial to a child's chances of later success. Children who achieve well in their early years are much more likely to be successful in future education and in later life. A recent report confirmed that school readiness in Tameside, which is measured by achievement of at least 78 points across the Early Years Foundation Stage Profile (EYFSP), has improved by 16% in Tameside over the last 7 years however, the rate of improvement was lower than statistical neighbours and national averages.

4.3 Summarised below are the key points:

- 59% of children in Tameside achieved at least 78 points in the EYFSP in 2012. This is 5% points below the England rate.
- The proportion of children achieving at least 78 points in the EYFSP has improved by 16% in Tameside over the last 7 years. This rate of improvement is slower than Statistical Neighbours (22%) and England (33%).
- The Tameside gap in achievement between the lowest performing 20% and the rest was 31% in 2012. Roughly similar to Statistical Neighbours and England.
- The rate of improvement in closing the achievement gap is 3% for Tameside. This is slower than Statistical Neighbours (18%) and England (23%).
- 41% of children were not school ready in Tameside in 2012. Compared to 36% in England.
- 16 (out of 141) Lower Super Output Areas have 60% or more of children not school ready.
- There are 'substantial to very strong' correlations between the themes of the High Demand Households analysis and the proportion of children not school ready.

4.4 In Tameside, achievement of 78 points has increased by 8% points between 2005 and 2012, from 51% to 59% respectively. This represents an improvement rate of 16%. Statistical Neighbours and England improved at a greater rate, 22% and 33% respectively. Whereas in 2005 performance in Tameside was the same or better than the comparator groups it now lags behind Statistical Neighbours by 3% points and England by 5% points.

4.5 Achievement of 78 points (% achieved) – Tameside, statistical neighbours & national comparison.

	2005	2012	% point change	% change
Tameside	51%	59%	8%	16%
Statistical Neighbours	51%	62%	11%	22%
England	48%	64%	16%	33%
Gap to Statistical Neighbours	Same	3% points worse		
Gap to England	3% points better	5% points worse		

- 4.6 In the Hattersley area where the new school will be located, 71% or more pupils were not considered ready for school.
- 4.7 Primary aged pupils attendance compares well with national and statistical neighbour's averages with 3.9% of days being lost compared to 4.41% nationally.
- 4.8 Tameside primary schools have maintained and increased their attainment levels at Key Stage 2 (11 years old), over the past 4 years and on average are out-performing the national average. 75% of primary schools are good or outstanding.

Key Stage 2 Results	% achieving Level 4 or above in both English and Maths in				% making expected progress	
	2012	2011	2010	2009	English	Maths
England - all schools	79%	74%	73%	72%	89%	87%
England - state funded schools only	79%	74%	73%	72%	89%	87%
Tameside	82%	76%	74%	73%	92%	90%

- 4.9 At Key Stage 4, although performance has been consistently improving year on year, continued improvement is a key focus of the Council. The results over that last four years are shown below:

Key Stage 4 Results	% of pupils making expected progress		% achieving 5+ A*-C GCSEs (or equivalent) including English and maths GCSEs				% achieving the English Bacc	% achieving grades A*-C in English and maths GCSEs
	English	Maths	2012	2011	2010	2009		
England - all schools	NA	NA	59.4%	59.0%	53.5%	49.8%	18.4%	60.0%
England - state funded schools only	68.0%	68.7%	58.8%	58.2%	55.2%	50.7%	16.2%	59.3%
Tameside	65.2%	65.5%	56.8%	55.6%	49.7%	45.5%	12.3%	57.3%

- 4.10 6.6% of 16 to 18 year olds are Not in Education Employment or Training and 11% of the working age population has no skills which is lower than the Greater Manchester average but higher than the national average. Only 44% of the working age population have skills at NVQ Level 3 or equivalent compared to the national average of 55% With only 22% with NVQ Level 4 skills.
- 4.11 Performance has been improving however only a continual drive to improve the attainment and aspirations from the youngest age possible will make the transformational impact which with support and sustain the regeneration of the borough and improve the quality of life of young people.

5. New Hyde Primary School Proposal

5.1 The establishment of a brand new primary school, although not unique, represents an exciting and challenging opportunity, to deliver a new school, with a focus on high aspirations, attainment and personal development to ensure that all pupils leave the school equipped to move on to secondary education, with the maximum potential to succeed.

5.2 The high level details of the new school are shown below:

Category	Detail
Address	Off Porlock Road, Hattersley Hyde (exact access to be determined)
Single or Split Site	Single site
Ownership	Tameside MBC – Freehold
Proposed Tenure	125 year lease
Area to be serviced	Hattersley and Godley, Hyde
Age Range – Primary School	4 to 11
Age Range – Nursery	Currently 3 year olds
Number of places	210 (30 in each year group) plus a nursery with a full time capacity of 13 places
Special Educational Needs	The new school will serve children with special education needs and/or disabilities for whom mainstream education is considered appropriate.
Gender of Pupils	Boys and Girls
Codes of Practice of Admission and Appeals	All potential sponsors are required to abide by the Codes of Practice on Admissions and Admission Appeals, participate in the Council's co-ordinated scheme for admissions and its In Year Fair Access Protocol.

6. Tameside Admission Criteria

6.1 If an Academy, Community or Voluntary School is Over Subscribed, the following criteria will apply:

1. Looked after Children or children who have previously been looked after but immediately after being looked after became subject to an adoption, residence, or special guardianship order.

A looked after child is a child who is (a) in the care of a local authority, or (b) being provided with accommodation by a local authority in the exercise of their social services functions (see the definition in section 22(1) of the Children Act 1989)

2. Children and families with exceptional medical or social needs.

Written evidence must be provided by a suitably qualified professional – e.g. a GP or consultant for medical needs, or a social worker for social needs – the information must confirm the exceptional medical or social need and demonstrate how the specified school is the only school that can meet the defined needs of the child. A panel of officers from Tameside MBC will make a decision as to whether to admit a child under this criterion, using the evidence provided. Parents and carers are responsible for providing all information in support of an application by the closing date, officers of the Council will not ask for additional information. All information provided will be treated in the strictest confidence.

3. Siblings

This will apply where there are brothers or sisters attending the school or the linked junior school at the time of application, and who will be still be attending at the time of admission – the September when a pupil goes into Reception. Preference will be given to children living nearest to the school.

The sibling criterion includes natural brothers/sisters, half-brothers/sisters, step-brothers/sisters, adopted brothers/sisters, brothers/sisters of fostered children, children of the parent/carer's partner. In each case they must be living at the same address. This allows for the admittance of children whose siblings will still be attending the preferred school.

4. All other applications on distance

Preference will be given to pupils living nearest to the school, taking into account ease of access to, and distance from, alternative schools.

Ease of access will be considered when parents provide details of particular reasons which mean their child could reach the nearest school but would face a disproportionately long journey to another school if denied admission to their nearest school. Details must be provided on the online form.

Definitions for admissions arrangements

Unless stated otherwise in the admissions arrangements, which can be obtained in full from the school or the Tameside Council website – www.tameside.gov.uk – the following definitions will apply:

Definition of distance

Distance will be measured as a straight line from the child's home address, using the address point assigned by the National Land and Property Gazetteer, to the school's main gate. Measurements will be made using the local authority's school admissions data mapping software, which uses a geographical information system based on the Ordnance Survey.

Home address

The address from which distance will be measured is the permanent residential address (at the time of application) of the parent with whom the child normally lives. Where parents have shared responsibility – the child lives with each for part of the week – the home address is the one from which the child travels to school the most during a week. If the number of days is equal, the home address will be that of the parent who receives the child benefit.

Tie-breaker

If a school is over-subscribed within any of the criteria, priority will be given to those children living nearest to the school. In the event of distances being the same for two or more applicants, where the distance would be the last place(s) to be allocated, the place will be allocated to the pupil that is nearer using walking distance as measured using the local authority's school admissions data mapping software.

In cases where twins, triplets, or other multiple birth siblings are split when allocations take place, they will be allocated a place over the Published Admission Number and will remain excepted pupils for the time they are in an infant class or until the class numbers fall back to the current infant class size limit.

- 6.2 The Council's policy is to admit children into the Reception Year in the September following their fourth birthday. As the new school is required to serve the identified need for primary places in the Hattersley and Godley area of Hyde, the Council expects the Academy Sponsor to adopt the same criteria used to determine priority for places at maintained schools as shown above.

7. School Place Planning

- 7.1 The main reason for establishing a new 210 place primary school in Hyde is to meet an increasing demand for places.
- 7.2 There are also a number of housing developments planned and in construction in Hattersley and Godley, Hyde which dependent on progress, will further increase demand.
- 7.3 As can be seen from the following tables, the total demand for places in almost all schools in Hyde for September 2013, exceeds capacity available.

Community and Voluntary Controlled School Name	Published Admission Number 2013	Number on roll in Jan 2013	Number of Requests 2013	Furthest distance at initial allocation (miles) 2013
Arundale Primary Lowry Grove, Mottram, SK14 6PW	30	155	57	n/a
Pinfold Primary Hattersley Road East, SK14 3NL	60	328	79	n/a
Broadbottom CE Primary Mottram Road Broadbottom SK14 6BB	15	104	47	n/a
Hollingworth Primary Market Street, Hollingworth SK14 8LP	30	173	50	n/a
Bradley Green Primary Bradley Green Road SK14 4NA	30	176	82	0.409
Dowson Primary Marlborough Road SK14 5HU	60	418	162	0.616
Flowery Field Primary off Old Road SK14 4SN	90	392	104	n/a
Gee Cross Holy Trinity CE Primary, Higham Lane SK14 5LX	30	206	132	0.314
Godley Primary St John's Drive SK14 2QB	60	212	129	n/a
Greenfield Primary Queen Street SK14 1QD	45	253	52	n/a
Leigh Primary Walker Lane SK14 5PL	45	278	54	n/a
Oakfield Primary and Moderate Learning Difficulties Resource Base St Mary's Road SK14 4EZ	30	210	73	n/a

Voluntary Aided School Name	Religious Affiliation	Published Admission Number	Number on roll in Jan 2013	Number of Requests 2013
St George's CE Primary School Henry Street SK14 1JL	CE	30	208	85
St Paul's Catholic Primary Turner Lane SK14 4AG	RC	30	204	94
Mottram CE Primary War Hill, Mottram SK14 6JL	CE	20	133	68
St James' Catholic Primary Cheriton Close SK14 3DQ	RC	30	132	36

8. Diversity in Tameside

8.1 The Council supports the view that diversity in governance of schools can support the raising of attainment and aspiration of young people in Tameside. We have realigned resources to enable additional challenge to all schools, regardless of their governance with the intention, that young people receive the best support possible. In addition, we have set up a School Performance Board chaired by the Executive Member, responsible for this area of our services, where all governing bodies and trusts will be held accountable.

8.2 It is our policy to support schools seeking academy status whether sponsored or not. There are currently seven high schools that have been set up or have converted to academy status within the borough including:

- New Charter
- Droylsden
- West Hill (Boys)
- Fairfield (Girls)
- Audenshaw (Boys)
- All Saints Roman Catholic College and
- Copley

There are two primary academies:

- Silver Springs and
- Denton West End

8.3 There are also four schools who have had Academy Orders published including Hawthorns, Pinfold and Arundale primary schools and Mossley Hollins High School.

8.4 Six high schools including, Astley, Cromwell, Alder, Longdendale, Denton Community College and Mossley Hollins, have also formed a trust with Ashton 6th Form College known as the A Plus Trust, which has been formed to develop an increase in standards through school to school support and challenge and may in the future become an academy trust.

8.5 The Council is keen to support other schools to convert to Academy status as well as to support the establishment of new schools as academies.

8.6 A summary of the number and type of schools for both primary and secondary are shown below:

Number and Type of Primary School
40 x Community Primary Schools
1 x community junior school
9 x voluntary controlled Church of England primary schools
1 x voluntary controlled Methodist primary school
9 x voluntary aided Church of England primary schools
12 x voluntary aided Roman Catholic primary schools
2 x academy primary schools

Number and Type of High Schools
6 x community high schools
2 x Roman Catholic voluntary aided high schools
7 x Academy schools (including 1 Roman catholic)

9. Criteria for Selection of Academy Sponsor

- 9.1 The Council and the Secretary of State believe that the selection of the most appropriate sponsor is absolutely critical to the future success of the school. Ministers have been clear that they expect that those taking on the role of an academy sponsor, must demonstrate capacity, quality and innovation. The Council and ministers will hold them to account on this basis both in selecting and approving sponsors and on an ongoing basis once the funding agreement has been approved and signed.
- 9.2 Nationally, ministers seek to match sponsors with schools in logical geographical arrangements, and to support sponsors who have the capacity, infrastructure and desire to grow, developing in an effective and sustainable way. Locally, the Council is seeking a sponsor with real commitment and capacity to meet the national criteria but also to provide added value through additional support to staff and pupils at the school and the wider community.
- 9.3 Potential academy sponsors are welcomed from a variety of backgrounds, including a high performing school that has recently converted to academy status, a further education college, an independent school, business leader and entrepreneur, or anyone that can apply their business and educational expertise to transforming opportunities for young people, For further information and guidance about what sponsoring an academy entails, please visit the supporting another school as an academy sponsor section of the DFE website.

9.3.1 Strategic Vision

Potential sponsors are required to:

- articulate clearly their educational vision, ethos, values and objectives for the new school;
- demonstrate how they will ensure high expectations for attainment, aspiration and personal development for all pupils and staff;
- demonstrate how they envisage working with other schools, local partners and the Council to set up the school and during operation;
- demonstrate how they will communicate vision,
- demonstrate how they will monitor and evaluate the quality of teaching and other support provided for pupils with a range of aptitudes and needs, including those who have special educational needs;
- evaluate the school's strengths and weaknesses and use their findings to promote improvement; develop capacity for sustaining improvement by developing leadership;
- capacity and high professional standards among all staff; and ensure that all pupils are safe;
- demonstrate of how the sponsor would work with parents, pupils and the wider community in establishing the academy.

9.3.2 Educational Capacity and Performance

The Council's vision is that all schools and academies in the borough will be Good or Outstanding and that young people should have the absolute best opportunity to learn and succeed. Therefore, potential sponsors will be required to demonstrate:

- who the key education leads responsible for setting up the school will be;
- clear educational aims and objectives;
- evidence of capacity and capability to deliver against targets, whether in an educational or other sector and a track record of success, driving up standards and maintaining improvement;
- how they will monitor and evaluate the quality of teaching and other support provided for pupils with a range of aptitudes and needs, including those who have special educational needs;
- how they will work with pupils and families attending the nursery unit to ensure that the number of children who are ready for school is significantly improved;
- how they will work with the Council to ensure that there is sufficient child care provision within this area of the borough;
- how they will develop and deliver a focussed and coherent education plan, that sets out the key innovations of the school, including the proposed curriculum; the approach to teaching and any particular ethos and how these will combine to achieve improved performance;
- commitment to continually improve teaching and learning, including the management of pupils' behaviour;
- how the anticipated needs of pupils with differing abilities will be met;
- what the proposer's aspirations for pupil achievement are and how they will measure success;
- strong, credible evidence that the school will raise the overall standard of education available in the local area, adding very high quality places to the local area; and
- a strong commitment to providing pupils with additional development opportunities and work experience and career development for pupils at other schools; and
- how they will support the transition for pupils to KS3.

All potential sponsors need to provide details of their proposed teaching and support structure and demonstrate their plans and arrangements for:

- setting engaging and motivating pupils to learn and foster their curiosity and enthusiasm for learning;
- enabling pupils to develop skills in reading, writing, communication and mathematics;
- developing and delivering an exciting, inspiring broad and balanced curriculum that: meets the needs of all pupils; enables all pupils to achieve their full educational potential and make progress in their learning;
- promoting good behaviour and securing pupils' safety and their spiritual, moral, social and cultural development;
- ensuring teachers' expectations are reflected in their teaching and planning, including curriculum planning, and are sufficiently high to extend the previous knowledge, skills and understanding of all pupils in a range of lessons and activities over time;
- facilitating well-judged teaching strategies, including setting challenging tasks matched to pupils' learning needs which successfully engage all pupils in their learning;
- ensuring pupils understand how to improve their learning as a result of frequent, detailed and accurate feedback from teachers following assessment of their learning;
- promoting learning through teachers' questioning and use of discussion;
- maximising the pace and depth of learning through teachers' monitoring of learning during lessons and any consequent actions in response to pupils' feedback;
- developing pupils' knowledge, skills and understanding across a range of subjects and areas of learning;
- enabling pupils to develop the skills to learn for themselves;
- where appropriate, including setting appropriate homework to develop their understanding; and making learning as successful as possible through the appropriate use of Information Communication Technology (ICT) in all areas of the curriculum, and
- through the analysis of pupils' performance data to monitor their progress and plan appropriate provision for individuals and groups.

9.4 Governance and Transparency

Potential sponsors are required to:

- provide a structure clearly showing the governance structure and lines of accountability proposed for the New Hyde Primary and Nursery School and how it links to each academy it sponsors or plans to sponsor, in order to demonstrate how you will hold the academy to account. Links to any other organisations should also clearly be shown;
- Potential sponsors will be required to confirm who will be responsible for attainment at the academy and how this will be managed. The Council will be holding academies and schools to account in respect of school improvement and attainment.
- indicate whether or not they are interested in sponsoring any other schools in Tameside. The Council is keen to support schools, particularly primary schools to convert to Academy status.

9.5 Financial Planning and Operational Efficiency

Potential sponsors are required to provide:

- details of the financial performance of your organisation and any sponsored academies over the last three financial years, showing expenditure, and income budgets, together with actual expenditure, income, and surplus or deficits;
- evidence of sound budget management should be provided, including details of who will be ultimately responsible for the pre and post financial operation of the academy;
- information detailing added value that their organization will provide for the new school in terms of financial and non-financial resources;
- details of financial resources that they will make available pre and post opening costs. Potential sponsors are also required to provide details of any other resources that they will make available; and.
- evidence of capacity to deliver this project on time, to secure best value for money, and to maintain financial viability. The proposer's financial plans should be consistent with the rest of their application, for example, in terms of staffing, pupil numbers and the education plan. They should be based on realistic assumptions about income and expenditure, and demonstrate that allowance has been made for unforeseen contingencies.

10. Timetable

10.1 The timetable for the selection of a sponsor for the proposed academy has been set by the Secretary of State for Education and is as follows:

Action	Target Date
Announcement of Targeted Basic Need Bidding Round	01.03.2013
Consultation with elected members, schools and responsible bodies	01.03.2013 to 28.4.2013
Submission of Targeted Basic Need Bid	28.04.2013
Announcement of Outcome of Provisional Funding	18.07.2013
DFE Academy Presumption Guidance Issued	18.7.2013
Local Authorities should publish specification inviting proposal to establish new academy or free school	02.08.2013
Information Event	12.08.2013
Interested parties must confirm that they will be submitting an Expression of Interest by 12 noon	23.08.2013
Local Authorities to inform the DFE of any expressions of interest that they have received from potential proposer	23.08.2013
Expression of Interest to be submitted 12 noon	06.09.2013
New sponsor approval applications to the DFE	06.09.2013
DFE will provide feedback on expressions of interest	06.09.2013
Selection of shortlist sponsors from Expressions of Interest	13.09.2013
Local Authorities to inform the DFE of all proposals received	04.10.2013
Local Authorities to submit an assessment of all proposals received to DFE indicating any preference(s)	18.10.2013
DFE will confirm sponsor and funding allocation for new school	12.12.2013

11. Application Process

- 11.1 An information event will be held on Monday 12 August 2013, at Dukinfield Town Hall, King Street, Dukinfield, Tameside SK16 4LA, from 10.00am to 12 noon. Potential proposers do not need to attend the event to be part of the process, however, it is an additional opportunity for you to find out more about the proposals. Please confirm whether or not you wish to attend the event by emailing Newhydeprimaryacademy@tameside.gov.uk or by telephoning Elaine Todd **0161 342 3238**.
- 11.2 Potential proposers should confirm that they will be submitting an Expression of Interest, no later than **12 noon on 23 August 2013**, to enable the Council to advise the Secretary of State of the interest parties his deadline of 23 August 2013. Confirmation should be sent via email to: Newhydeprimaryacademy@tameside.gov.uk.
- 11.3 Completed Expressions of Interest should be submitted by no later than **12 noon on 6 September 2013**. All applications should be submitted via email to Newhydeprimaryacademy@tameside.gov.uk.

12. Contact Details

12.1 The contact details for this application are:

Elaine Todd

Assistant Executive Director
Asset and Investment Partnership Management
Email: elaine.todd@tameside.gov.uk or Tel: 0161 342 3238

Heather Loveridge

Interim Head of Education Services
Email: heather.loveridge@tameside.gov.uk or Tel: 0161 342 2050

Catherine Moseley

Head of Access and Inclusion
Email: catherine.moseley@tameside.gov.uk or Tel: 0161 342 3302

2 August 2013



Department
for Education

The academy/free school presumption

**Departmental advice for local authorities
and new school proposers**

July 2013

Contents

Summary	4
About this departmental advice	4
Effective date	4
What legislation does this advice relate to?	4
Who is this advice for?	4
Key points	5
Academy/free school presumption process	6
Overview	6
Local authority consultation	6
Impact assessment	6
Seeking proposals	6
Funding arrangements	7
Notifying the department – school specification	7
Notifying the department – proposals	8
Sponsor approval	8
Completing the assessment	8
Funding agreement	9
Sponsor consultation	10
Communication	10
Other useful information	10
Further sources of information	11
Targeted Basic Need Programme	11
Associated resources (external links)	11
You may also be interested in (internal links)	11

Summary

About this departmental advice

1. This advice is non-statutory. It is part of the department's guidance to local authorities (LAs) on the establishment of new schools. It sets out for LAs and new school proposers the department's expectations of how the academy/free school presumption process should operate in practice and the characteristics and qualities that new school proposers must demonstrate. This advice applies to all new schools established under the academy/free school presumption, including those that are proposed to be funded from the Targeted Basic Need Programme.

2. The Education Act 2011 changed the arrangements for establishing new schools and introduced section 6A (the academy/free school presumption) to the Education and Inspections Act 2006. Where a LA thinks there is a need for a new school in its area it must seek proposals to establish an academy/free school. Section 6A came into effect:

- on 1 February 2012 for new schools other than pupil referral units; and
- on 1 September 2012 for new pupil referral units.

Effective date

3. This advice applies from 18 July 2013. The requirements set out in this advice supersede those of the previous version. This advice applies to any proposed new schools where LAs seek academy/free school proposals on or after the date of its publication, and all new schools for which LAs have applied for funding from the Targeted Basic Need Programme.

What legislation does this advice relate to?

- 4.
- The Education Act 2011 (EA 2011).
 - The Education and Inspections Act 2006 (EIA 2006).
 - The Academies Act 2010 (AA 2010).

Who is this advice for?

5. This advice is for:
- Local authorities; and
 - New school proposers.

Key points

6. The presumption arrangements require LAs to seek proposals to establish an academy/free school where they have identified the need for a new school in their area. The LA is responsible for providing the site for the new school and meeting all associated capital and pre-/post-opening costs.
7. All new academy/free school proposals require the Secretary of State's approval. It is the Secretary of State who will enter into a funding agreement with the proposer.
8. LAs must notify the Secretary of State of their plans to seek proposals for a new school as soon as the need for a new school has been agreed.
9. Once formal proposals are received, the Secretary of State must be provided with details of all proposers. The Secretary of State will then notify the LA if he has any concerns about a proposer's capability or capacity to deliver the proposal and particularly where he is minded not to enter into a funding agreement with a particular proposer.
10. The LA should assess all proposals received (see advice in paragraphs 23-25). The outcome of the LA's assessment should be sent to the Secretary of State. In deciding the proposer with whom he would be prepared to enter into a funding agreement, the Secretary of State will consider the LA assessment very carefully. The preference indicated by the LA will be a key factor in that consideration. However, he will reserve the right to put in place a proposer of his own choice, particularly where there is further evidence available to him about the suitability of a proposer – or the availability of a better proposer. The intention is to ensure that the school is always established by the best proposer possible.

Academy/free school presumption process

Overview

11. Where a LA thinks a new school needs to be established in their area, section 6A of EIA 2006 places the LA under a duty to seek proposals to establish an academy/free school and to specify a date by which proposals must be submitted to the LA. In considering the need for a new school, LAs should factor in any free school projects that the department has approved and are due to open.

12. For the Targeted Basic Need Programme, LAs will need confirmation of their provisional funding allocations for new provision as early as possible. For that reason the department will be working to the timescales provided in the table at Annex A to ensure that it is possible to provide that confirmation by early December. LAs must adhere to these timescales for each element of the process. If you have any queries about the timetable please contact: academy.presumption@education.gsi.gov.uk

Local authority consultation

13. It will be for LAs to decide how to consult on the proposed new school and with whom (e.g. other schools, academies, the wider community, diocese and any others affected by the proposals). They should be clear from their school place planning about the type (e.g. mainstream, special educational needs, PRU), age range, gender and capacity of the academy/free school they wish to see established, and the expected cost.

Impact assessment

14. As part of the planning process for new schools, LAs must also undertake an assessment of impact of the proposal, both on other existing educational institutions locally and in terms of impact on particular groups of pupils from an equalities perspective. This is to enable the Secretary of State to meet his duties under section 9 of the Academies Act 2010 and under section 149 of the Equality Act 2010. Most LAs will already do this, so in practice it will just be a matter of providing the Secretary of State with a copy of their assessment. However, in the unlikely event that the Secretary of State has concerns about the level of analysis, he reserves the right to ask a LA to undertake further work on their assessment.

Seeking proposals

15. The LA should take all necessary steps to ensure that the widest possible range of groups or organisations that might be interested in establishing the new school are aware of the opportunity to do so, including any local 'outstanding' schools or other potential proposers that might be interested in applying to run the school. LAs can access the

department's list of approved sponsors [here](#). The department will also play a role in generating interest from high quality proposers – by posting details of new academy/free school proposals on its own website, encouraging key stakeholders to do the same and by sign-posting proposals to existing sponsors or potential sponsors who we are aware are keen to operate in that region.

Funding arrangements

16. As under the previous new school competition arrangements, the LA is responsible for providing the site for the new school, and meeting all associated capital costs (unless they are successful in bidding for funding from the Targeted Basic Need Programme).

17. Local authorities are also required to make provision in their growth funds to support increases in pupil numbers relating to basic need. This relates to the per-pupil revenue funding in addition to all funding for pre-opening development costs and post-opening funding required to address diseconomies of scale until a school reaches full capacity. This is because the new academy or free school will be funded on a recoupment basis. School funding arrangements allow LAs to retain funding centrally to cover these costs. This is detailed in full in the 2013-14 School Finance Regulations which were published in December 2012. Further information can be obtained [here](#).

18. Local authorities are expected to work with selected proposers to agree a reasonable and mutually acceptable funding allocation for the LA to cover pre- and post-opening costs. The department will provide a one-off payment of £25,000 to the successful proposer for the legal costs associated with establishing a new academy/free school. Upon opening, the school will be funded by the EFA on the same basis as other academies and free schools in the same LA area.

Notifying the department – school specification

19. The LA must notify the department as soon as the need for a new school has been agreed, forwarding to the department:

- a copy of the new school specification, including confirmation:
 - o that the LA has identified the required capital to establish the new school, the amount and its source (e.g. the Targeted Basic Need Programme);
 - o that the LA will meet all pre- and post-opening costs associated with establishing the new school (Paragraphs 16-18);
 - o that the LA will provide the site for the new school (this is also a condition of the Targeted Basic Need Programme);

- o of the address of the site for the new school, or all sites where a school will operate from split sites;
- o of site ownership or tenure arrangements and how these will operate for the new school. For schools that are intended to be funded from the Targeted Basic Need Programme it is important that the required land will be available to deliver the additional pupil places by September 2015 at the latest;
- their impact assessment (Paragraph 14);
- a link to the LA's website page where the relevant information will be available to interested parties.

20. A condition of any funding from the Targeted Basic Need Programme will be that the new school specification published under the academy/free school presumption process will be that for which the department has agreed funding.

Notifying the department – proposals

21. Once the specified date for submitting the academy/free school proposals to the LA has passed, the LA must provide details of all proposers that have submitted formal proposals, to the Secretary of State for initial consideration.

Sponsor approval

22. The Secretary of State will only consider entering into a funding agreement with an approved sponsor. (The department's approved sponsor list can be accessed [here](#). Consequently, new proposers will need to be assessed by the department through the normal sponsor approval route. Information on the department's sponsor approval process can be found [here](#)). We recommend that LAs make it clear when publishing their proposals that proposers who are not known to the department will have to go through this process and should contact the department at the outset, and certainly before submitting a formal proposal to the LA.

Completing the assessment

23. The LA should complete an assessment of proposals and provide the Secretary of State at the earliest opportunity with this and their scoring of the proposals, alongside a written notification setting out the steps the authority has taken to seek proposals for an academy/free school.

24. The assessment should be based on the following criteria:

- the capacity and quality of the proposer. The Secretary of State assesses on the basis of the criteria [here](#). The LA should bear in mind that when considering a LA's

assessment, the department will focus on these criteria, particularly those around strategic vision, educational capacity and performance, financial planning and operational capacity and governance. For existing sponsors, the department will focus on the credibility and track record of the proposer, their capacity to take on new projects and the local infrastructure that will support the proposal;

- the capability and capacity of the proposer to deliver this project on time, to secure best value for money, and to maintain financial viability. The proposer's financial plans should be consistent with the rest of their application, for example, in terms of staffing, pupil numbers and the education plan. They should be based on realistic assumptions about income and expenditure, and demonstrate that allowance has been made for unforeseen contingencies; and
- the extent to which proposals demonstrate the proposers' capability to promote high standards, and to innovate to drive system change. For example, demonstrating a focussed and coherent education plan that sets out the key innovations of the school, including the proposed curriculum; the approach to teaching and any particular ethos; how these will combine to achieve improved performance; how the anticipated needs of pupils with differing abilities will be met; and the proposer's aspirations for pupil achievement and measures of success. The proposal should give strong, credible evidence that the new school will raise the overall standard of education available in the local area, adding very high-quality places to the system.

25. The LA may state its preferred proposer or ranking of proposers, which the Secretary of State will take into consideration when deciding whether or not to enter into a funding agreement with any of the proposers.

Funding agreement

26. Before deciding whether or not to enter into a funding agreement with any proposer, the Secretary of State will need to be satisfied about their suitability to set up and run an academy/free school. The LA should therefore undertake due diligence checks on new proposers. Any proposals put forward by organisations which advocate violence or other illegal activity will be rejected. In order to be approved, proposals should demonstrate that they would support UK democratic values including respect for the basis on which UK laws are made and applied; respect for democracy; support for individual liberties within the law; and mutual tolerance and respect. In order to enable the Secretary of State to take an informed decision, the department may ask proposers to provide additional information about themselves and to consent to checks being carried out.

27. As soon as a suitable proposer is agreed "in principle" by the Secretary of State, the department will notify the LA, the successful proposer and the local MP. Once they have been notified of the successful proposer, the LA can then inform other applicants that they have not been successful. It will then be for the successful proposer to work

towards agreeing a funding agreement and establishing the new academy/free school with support from the LA and the department, as required. Where Targeted Basic Need funding has been agreed, the school should be delivered to the original approved specification, and adhere to this model for at least two years after opening, unless there are extraordinary circumstances that would lead to a reconsideration of requirements.

Sponsor consultation

28. The successful proposer is under a duty, as required by section 10 of the AA 2010, to consult such persons as they think appropriate on whether they should enter into a funding agreement for the new school with the Secretary of State.

29. The LA will continue to have an interest because of its duties to secure sufficient suitable schools.

Communication

30. All documentation should be submitted electronically to the department for education at: academy.presumption@education.gsi.gov.uk.

31. The department will publish on its website at: <http://www.education.gov.uk/schools/leadership/schoolorganisation> details of those LAs that are seeking to establish new schools, including links to their websites. The department will also inform the Independent Academies Association and New Schools Network, to alert potential proposers to the need for a new school.

Other useful information

32. Local authorities must continue to plan for and secure sufficient schools and places for their area in line with their duties under section 14 of the Education Act 1996.

33. Once LAs have published their new school specification they may not withdraw from the academy/free school presumption process.

34. “Academy” is the legal term which also includes free schools of all types, university technical colleges and some studio schools, including 16-19 and alternative provision (pupil referral unit) academies. This document uses “academy/free school” as the collective term for these types of educational institutions.

35. “Proposer” and “sponsor” in this document refer to the body or group that is proposing the new school.

Further sources of information

Targeted Basic Need Programme

<http://www.education.gov.uk/aboutdfe/executiveagencies/efa/schoolscapital/a00222248/targeted-basic-need-programme>

Associated resources (external links)

- Education Act 2011 <http://www.legislation.gov.uk/ukpga/2011/21/contents/enacted>
- Education and Inspections Act 2006 <http://www.legislation.gov.uk/ukpga/2006/40/contents>
- Academies Act 2010 <http://www.legislation.gov.uk/ukpga/2010/32/contents>
- New Schools Network <http://www.newschoolsnetwork.org/>
- Independent Academies Association <http://www.iaa.uk.net>

You may also be interested in (internal links)

New School Proposals – information and links seeking proposers to establish a new academy or Free

School <http://www.education.gov.uk/schools/leadership/schoolorganisation/b00210493/new-school-proposals>

Free

Schools <http://www.education.gov.uk/schools/leadership/typesofschools/freeschools>

Sponsored

Academies <http://www.education.gov.uk/schools/leadership/typesofschools/academies>

University Technical Colleges and Studio

Schools <http://www.education.gov.uk/schools/leadership/typesofschools/technical>

Pupil Referral

Units <http://www.education.gov.uk/aboutdfe/statutory/g00211923/alternative-provision>

Timetable for proposals under the Targeted Basic Need Programme

DfE informs LAs of provisional targeted basic need funding allocations	By 18 July 2013
LA should publish specification inviting proposals to establish new academy/free school (NB the LA will need to notify the DfE of all proposals by 4 October so should set its own deadlines accordingly)	By 2 August 2013
LAs should alert the DfE to any expressions of interest they have received from potential proposers*	By 23 August 2013
New sponsor approval applications to the DfE	By 6 September 2013
DfE will provide feedback on expressions of interest	By 6 September 2013
LA should inform DfE of all proposals received	By 4 October 2013
LA should submit assessment of proposals to DfE indicating any preference(s)	By 18 October 2013
DfE confirm sponsor and funding allocations for new academy	By 12 December 2013

*This will enable the DfE to let LAs know where the Secretary of State is minded not to enter into a funding agreement with a particular proposer.



Department
for Education

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Reference: DFE-00074-2013



Department
for Education

Establishing new maintained schools

**Departmental advice for local authorities
and new school proposers**

June 2013

Summary

About this departmental advice

1. This advice is non-statutory. It is part of the department's guidance to local authorities (LAs) on the establishment of new schools. On 1 February 2011 the Education Act 2011 (EA 2011) amended the Education an Inspections Act 2006 (EIA 2006) to change the arrangements for establishing new schools. Most new schools will now be established via the academy/free school presumption and the related departmental advice describes the department's expectations of how that process should operate. This advice sets out for local authorities and other new school proposers the now limited circumstances in which the establishment of a new maintained school can be proposed.

School Competitions (under section 7 of EIA 2006)

2. If the academy presumption does not result in suitable academy/free school proposals, a statutory competition can be held with the consent of the Secretary of State (section 7(1)). This will not require a separate application for consent, since the Secretary of State will indicate to the local authority that a competition can be held, if he is satisfied that there is no suitable academy/free school proposal.

3. Where consent to hold a competition is given, the local authority must follow the statutory process set out in Schedule 2 to the EIA 2006 (as amended by EA 2011) and the Establishment and Discontinuance Regulations.

4. Significant changes made to section 7 competitions by EA 2011 are:

- The removal of section 8 EIA 2006, which means that local authorities can no longer submit their own community or foundation school proposals in a competition); and
- a new section 7A EIA 2006, which means that at any time before the date specified for the return of proposals, the Secretary of State may direct a local authority to withdraw a competition notice; or, a local authority may withdraw a competition notice with the Secretary of State's consent. This allows a competition to be ended where circumstances have changed e.g. where the new school is no longer needed or an alternative option is found, such as the enlargement of one or more existing schools instead.

5. Academy/free school proposals and proposals for foundation (by proposers other than a local authority), voluntary controlled and voluntary aided schools, can be submitted into the competition by the deadline specified in the first notice.

Decision making – section 7 competitions

6. The arrangements for deciding a competition have also changed. Since local authorities cannot enter their own school proposals, the Schools Adjudicator will no

longer have a role in deciding competitions (unless the local authority is involved in the foundation of a proposed foundation school – paragraph 10 of Schedule 2 EIA 2006).

7. Important changes arising from EA 2011 are:

- Where an academy/free school proposal is entered into a competition by the specified deadline, the Secretary of State must consider these proposals first to decide whether he is willing, in principle, to enter into a Funding Agreement with the academy/free school proposer (paragraph 7A of Schedule 2 EIA 2006);
- if an academy/free school proposal is deemed suitable, the competition ends and the proposer works with the Department and local authority to progress its proposal;
- if an academy/free school proposal is not considered suitable, or no academy/free school proposal is received, the competition continues and it is for the local authority to decide which maintained school proposal wins (paragraph 8 of Schedule 2 EIA 2006, subject to the local authority's involvement in any foundation school's foundation); there is no right of appeal; and
- where a competition does not identify a suitable academy/free school or maintained school, the local authority may publish its own community or foundation school proposal under amended section 11 of EIA 2006; the Schools Adjudicator will be the decision maker in such cases.

Establishing a new maintained school outside the competitive arrangements (under section 10 or section 11 of EIA 2006)

8. It is still possible to publish proposals for maintained schools outside the competitive arrangements in certain circumstances, as set out below.

Other new maintained school proposals (section 10 EIA 2006)

9. Where an academy/free school approach is not considered to be appropriate and the proposal does not fall under section 11 special cases, it is still possible to apply to the Secretary of State for consent to publish proposals for replacement community schools, or brand new or replacement foundation or voluntary controlled maintained schools. Each application will be considered on its merits and the particular circumstances of the case, including whether the need for a new school might be better met by an academy/Free School. Where consent is given to publish new maintained school proposals, a statutory process must be followed, as set out in Schedule 2 to EIA 2006 and the Establishment and Discontinuance Regulations.

Special cases (section 11 of EIA 2006)

10. In the interests of reducing bureaucracy, the consent of the Secretary of State is no longer required to publish maintained school proposals in certain circumstances. Section 11 EIA 2006, as amended by EA 2011 provides for the following:

- proposals for a new voluntary aided school;

- proposals for a new community or foundation primary school that is to replace a maintained infant and a maintained junior school;
- proposals for a new school resulting from the reorganisation of existing faith schools in an area, including an existing faith school losing or changing its religious designation; or
- local authority proposals for a new foundation or community school, where suitable academy/Free School proposals have not been identified and a competition has been held but did not identify a suitable provider.

11. Proposals for former independent schools wishing to join the maintained sector and new local authority maintained nursery schools can still be published under section 11, as before.

12. In each case a statutory process, as set out in Schedule 2 to EIA 2006 and the Establishment and Discontinuance Regulations, must be undertaken. The Schools Adjudicator will decide local authority proposals, and local authorities will decide proposals from other proposers (except foundation school proposals where the local authority is involved as a member of the foundation (Trust), in which case the Adjudicator will be the decision maker).



Department
for Education

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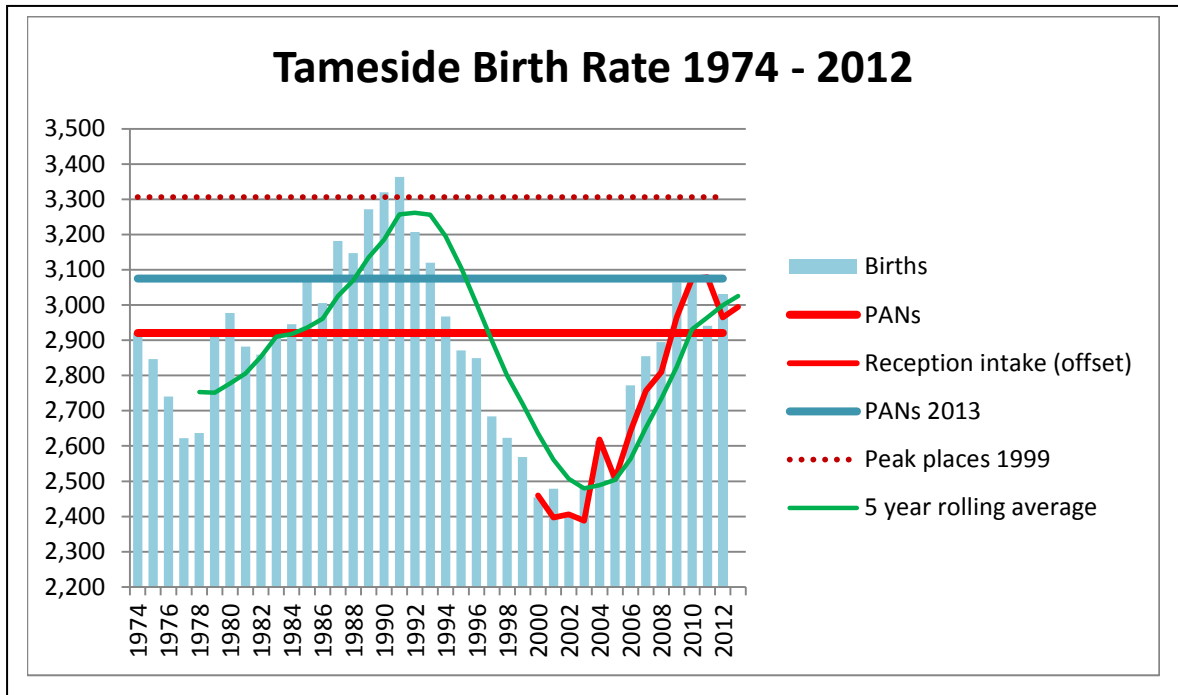
Research: DFE-00085-2013

NEW ASHTON PRIMARY SCHOOL, MOSSLEY ROAD, ASHTON UNDER LYNE

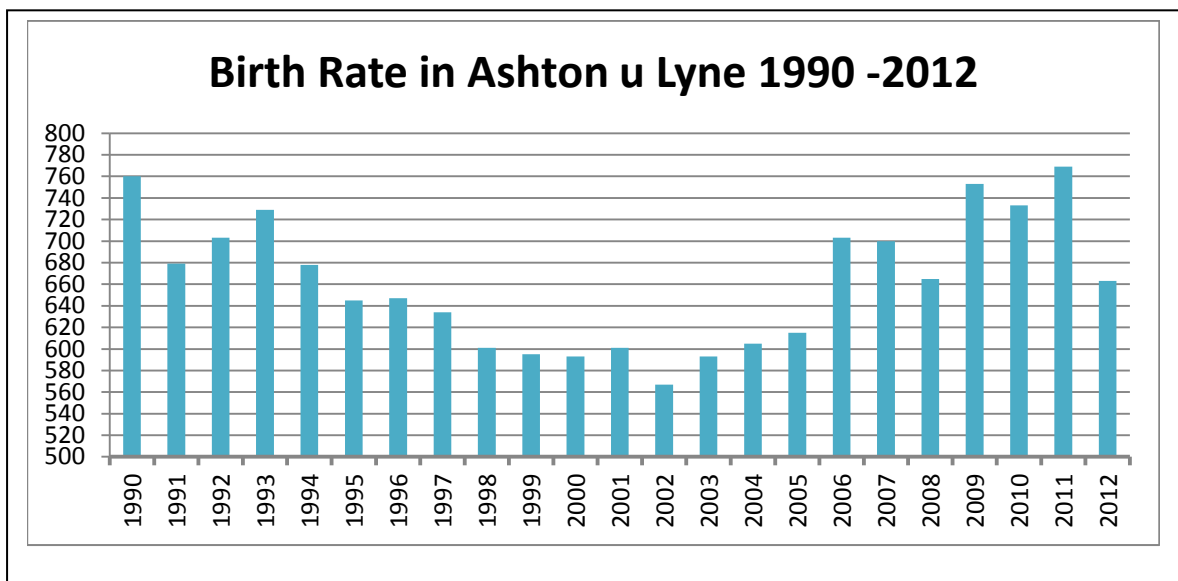
IMPACT ASSESSMENT

1. CURRENT DEMANDS

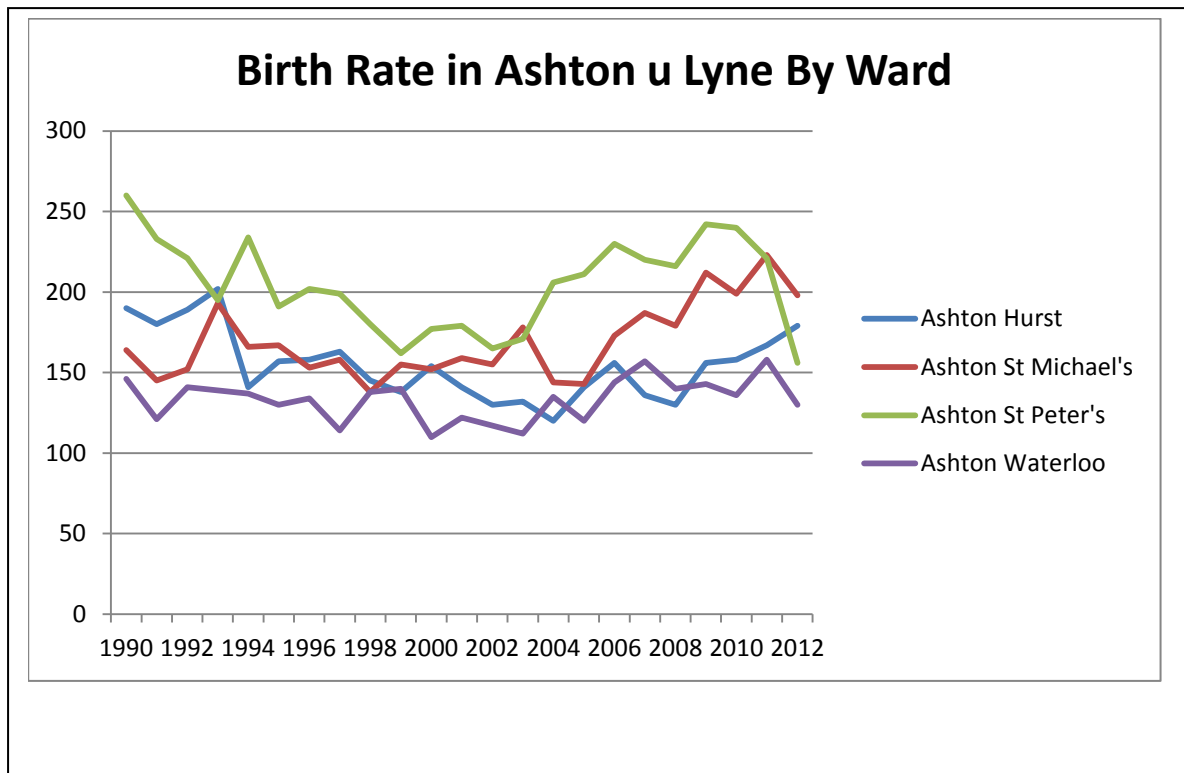
1.1 The overall birth rate in Tameside has been increasing since 2002, but escalated rapidly between 2005 and 2010 and now stands at 25.7% higher than 2002. The birth rate cycle in Tameside is approximately 25 years and the birth rate is likely to continue to increase for another 3 years so the Council is expecting the peak in 2016 for intake into primary schools in September 2020.



1.2 The birth rate in Ashton has largely mirrored that of Tameside as a whole as shown in the graph below.



1.3 There are four wards in the Ashton u Lyne area and the birth rates within the four wards can fluctuate between years as shown below.



1.4 However, Ashton Hurst and Ashton St Michael's have experienced large increases in the birth rates over the last 10 years and at a greater rate than Tameside as whole. It is proposed to open the new school in Ashton St Michael's ward.

Ward	% increase in birth rate 2002 - 2012
Ashton Hurst	37.7%
Ashton St Michael's	27.7%
Ashton St Peter's	-5.5%
Ashton Waterloo	11.1%
Ashton Total	16.9%
Tameside Total	25.7%

2. COHORT SURVIVAL RATE

2.1 School place planning takes into account a number of factors when looking at the number of school places needed to meet the Council's statutory responsibility of having a school place for all pupils of compulsory school age resident in the borough. Planning need takes into account the birth rate, in borough movement and the level of new housing within the borough to give an overall cohort survival rate ie the number of pupils expected to require a school place. A five year rolling average of the cohort survival rate has been found to be the most accurate in predicting future demand for places. Currently, the overall cohort survival rate in the borough is 97.5% but this varies between towns from 84.8% to 151.4% as demonstrated in the table below.

Average intake to birth rate	2009/2010	5 yr rolling average	2010/2011	5 yr rolling average	2011/2012	5 yr rolling average	2012/2013	5 yr rolling average
	%	%	%	%	%	%	%	%
Ashton	86.7	85.0	76.5	82.8	81.4%	83.8%	87.5%	84.8%
Audenshaw	162.6	138.0	152.7	144.9	150.4%	144.4%	156.8%	151.4%
Denton	106.2	112.7	110.6	112.3	120.3%	114.3%	118.6%	115.9%
Droylsden	113.0	102.7	97.1	102.7	104.8%	104.2%	125.8%	108.1%
Dukinfield	104.0	113.2	129.9	118.6	119.7%	116.6%	113.7%	117.1%
Hyde and Longdendale	93.4	89.0	85.4	87.8	84.3%	87.6%	86.6%	87.5%
Mossley	89.3	89.1	92.1	88.7	86.4%	87.6%	84.2%	87.9%
Stalybridge	89.6	91.8	88.7	91.1	89.5%	91.3%	98.2%	91.5%
Tameside	98.9	97.4	95.3	97.1	97.2%	97.5%	96.0%	97.5%

- 2.2 Additionally, Tameside is predicting that it needs to build an additional 8,000, houses over the next 10 years to meet demand. Based on national information, Tameside Council uses a scaling factor of 0.03 to predict the number of pupils per year group that housing developments will generate. This means that approximately 240 additional places per year group will be needed on top of increased demand from a rising birth rate. Whilst it can be seen that the Borough's birth rate fluctuates over a 25 year cycle, increased housing will lead to a permanent increase in the number of school places needed.

3. PRIMARY SCHOOL PLACES

- 3.1 The Council has been proactive in tackling the issue of rising births over recent years. The Published Admission Number (PAN) has been permanently increased at many schools and a number of temporary increases using bulge classes have been implemented.
- 3.2 The following table provides details on the number of primary places that have increased each year in line with the increase to the birth rate.

	09/10	10/11	11/12	12/13	13/14	14/15	15/16	Total
Permanent		68	105	10	13	85	60*	341
Temporary					155	95		250
Total Places	2,734	2,802	2,907	2,917	3,085	3,110	3,075	531

*new Ashton school

- 3.3 Places are further identified by school and ward area for each intake year

2010 Increases to Published Admission Numbers

School	Ward	Increase	Total Number of places
Waterloo	Ashton Waterloo	50-60	10
Gresswell	Denton North East	51-60	9
Russell Scott	Denton North East	51-60	9
Fairfield Road	Droylsden East	30-45	15
Manchester Road	Droylsden West	45-60	15
Bradley Green	Hyde Newton	20-30	10
		Total	68 Permanent

2011 Increases to Published Admission Numbers

School	Ward	Increase	Total Number of places
Poplar Street	Audenshaw	45-60	15
Corrie Primary	Denton South	45-60	15
Fairfield Rd	Droylsden East	45-60	15
Yew Tree	Dukinfield/Stalybridge	60-70	10
Greenfield	Hyde Godley	40-45	5
Arlies	Stalybridge North	30-45	15
Millbrook	Stalybridge North	25-30	5
Wild Bank	Stalybridge South	20-30	10
Ridgehill	Stalybridge North	45 -60	15
		Total	105 Permanent

2012 Increases to Published Admission Numbers

School	Ward	Increase	Total Number of places
St James	Hyde Godley	20 – 30	10
		Total	10 Permanent

2013 Increases to Published Admission Numbers

School	Ward	Increase	Total Number of places
Godley	Hyde Godley	30-60	30 (Temporary)
Flowery Field	Hyde Newton	60-90	30 (T)
Rosehill	Ashton Hurst	60-90	30 (T)
Lyndhurst	Dukinfield	30-60	30 (T)
The Heys	Ashton St Michael's	30-60	30 (T)
St John Fisher	Denton South	26-30	4
St Raphael's	Stalybridge South	26-30	4
Buckton Vale	Stalybridge North	40-45	5
St Josephs	Mossley	20-25	5 (T)
		Total	13 Permanent
		Total	155 Temporary

2014 Increases to Published Admission Numbers

School	Ward	Increase	Total Number of places
Flowery Field	Hyde Newton	Stay at 90 prior to new build	30
Holden Clough	Ashton Hurst	30-60	30
Linden Road	Denton North East	30-60	30 (T)
St Johns	Dukinfield/Stalybridge	30-45	15
St Pauls	Hyde Newton	30-60	30 (T)
Rosehill	Ashton Hurst	Stay at 90 1 further intake	30 (T)
St Josephs	Mossley	20-25	5 (T)
Yew Tree	Dukinfield/Stalybridge	70-75	5
Broadbottom	Longdendale	15-20	5
		Total	85 Permanent
		Total	95 Temporary

Total Number of Places for each Ward

Ward	Total Number of Permanent Places	Total Number of Temporary Places
Ashton Waterloo	10	0
Ashton Hurst	30	60
Ashton St Michael	60 (new Ashton school)	30
Ashton St Peter's	0	0
Audenshaw	15	0
Denton North East	18	30
Denton South	19	0
Denton West	0	0
Droylsden East	30	0
Droylsden West	15	0
Dukinfield	0	30
Dukinfield/Stalybridge	30	0
Hyde Newton	40	60
Hyde Godley	15	30
Hyde Werneth	0	0
Longdendale	5	0
Mossley	0	10
Stalybridge North	40	30
Stalybridge South	14	0
Total	341	250

4. LOCAL DEMOGRAPHICS

- 4.1 The following data is taken from the 2011 census to give a profile of the area where it is proposed to open the new school. As can be seen, the area is ethnically and socio-economically diverse.

		NEIGHBOURHOOD / COMMUNITY					TAMESIDE
		CURRENT		PROPOSED			
DEMOGRAPHIC		Rosehill	Heys	Rosehill	Heys	New	
CONTEXT	Total Population	4,977	4,698	3,003	3,231	3,441	219,324
	Population Density	48	64	35	83	49	21
GENDER	Male	48%	52%	49%	52%	49%	49%
	Female	52%	48%	51%	48%	51%	51%
AGE	0-4 years	8%	8%	6%	9%	8%	7%
	5-9 years	7%	6%	6%	6%	7%	6%
	10-59 years	64%	69%	63%	69%	68%	66%
	60 years and over	21%	17%	25%	16%	17%	22%
	Median Age	39	36	42	34	36	39
MARITAL	Single (incl. divorced / widowed)	55%	58%	50%	61%	58%	56%

		NEIGHBOURHOOD / COMMUNITY					TAMESIDE
		CURRENT		PROPOSED			
DEMOGRAPHIC		Rosehill	Heys	Rosehill	Heys	New	
	Married	45%	42%	50%	39%	42%	44%
	Registered same-sex civil partnership	4	5	2	2	5	326
HOUSEHOLD	All households	2,072	2,041	1,329	1,487	1,297	94,953
	Lone parent, with dependent children	12%	9%	10%	10%	11%	9%
	No adults in employment with dependent children	8%	6%	5%	8%	8%	5%
	Long term health problem and dependent children	7%	6%	5%	7%	8%	5%
MIGRATION	Residents born outside of UK	9%	20%	7%	23%	12%	7%

4.2 Within the community where it is proposed to open the new school, there is a high population density due to the urban nature of the area, there are higher than average single people and lone parents. There are higher than average households with no adults in employment who have dependent children and there are high levels of residents born outside the UK. These factors are likely to have an impact on the distance parents are likely to travel to a school for their children.

		NEIGHBOURHOOD / COMMUNITY					TAMESIDE
		CURRENT		PROPOSED			
DEMOGRAPHIC		Rosehill	Heys	Rosehill	Heys	New	
ETHNICITY	White	87.9%	72.3%	91.0%	69.2%	81.4%	90.9%
	Mixed	2.0%	1.9%	1.8%	1.9%	2.2%	1.4%
	Asian	8.6%	23.7%	6.3%	26.7%	14.2%	6.6%
	Black	1.3%	1.6%	1.0%	1.7%	1.5%	0.8%
	Other	0.3%	0.5%	0.0%	0.4%	0.7%	0.2%
	White Other	2.2%	5.4%	2.0%	6.7%	2.6%	1.7%
	Indian	4.2%	9.4%	3.6%	9.3%	6.9%	1.7%
	Pakistani	2.9%	10.3%	1.6%	12.7%	5.0%	2.2%
	Bangladeshi	0.5%	1.6%	0.3%	2.1%	0.7%	2.0%
	Born in Poland	%	1.3%	3.7%	0.9%	5.0%	1.4%
No.		64	174	28	162	48	1,696

			NEIGHBOURHOOD / COMMUNITY					TAMESIDE
			CURRENT		PROPOSED			
DEMOGRAPHIC			Rosehill	Heys	Rosehill	Heys	New	
LANGUAGE	No-one in household has English as main language	%	3%	9%	2%	11%	4%	2%
		No.	59	185	24	164	56	2,223
CARERS	Providing unpaid care		12%	9%	13%	9%	10%	11%
RELIGION	Christian		63%	53%	69%	49%	58%	64%
	Hindu		4%	9%	3%	9%	6%	1%
	Muslim		4%	13%	2%	16%	6%	4%
	Other		1%	1%	1%	1%	1%	1%
	No religion		23%	19%	20%	20%	24%	24%
	None stated		5%	6%	6%	5%	6%	6%
DISABILITY	Day to day activities limited a lot		11%	12%	9%	13%	11%	11%

4.3 Within the community where it is proposed to open the new school, there are high levels of households where no-one has English as the main language and day to day activities are limited due to disability. This is likely to have an impact on the distance parents are likely to travel to a school for their children.

SOCIO-ECONOMIC CONTEXT								
			NEIGHBOURHOOD / COMMUNITY					TAMESIDE
			CURRENT		PROPOSED			
DEMOGRAPHIC			Rosehill	Heys	Rosehill	Heys	New	
Skills	Persons with no qualifications (aged 16+)		29%	30%	26%	32%	30%	28%
Mobility	Households without access to car/van		30%	50%	20%	73%	35%	29%
Housing tenure	Homes owned		59%	57%	70%	48%	58%	64%
	Homes social landlord		29%	18%	20%	23%	28%	22%
	Homes private landlord		12%	26%	11%	29%	14%	14%
Housing type	Detached/semi-detached		59%	27%	66%	11%	57%	50%
	Terraced		29%	58%	27%	70%	30%	36%
	Flats/apartments		11%	16%	7%	19%	13%	14%

Economically active	Male	70%	71%	71%	70%	70%	73%
	Females	59%	60%	60%	57%	61%	64%

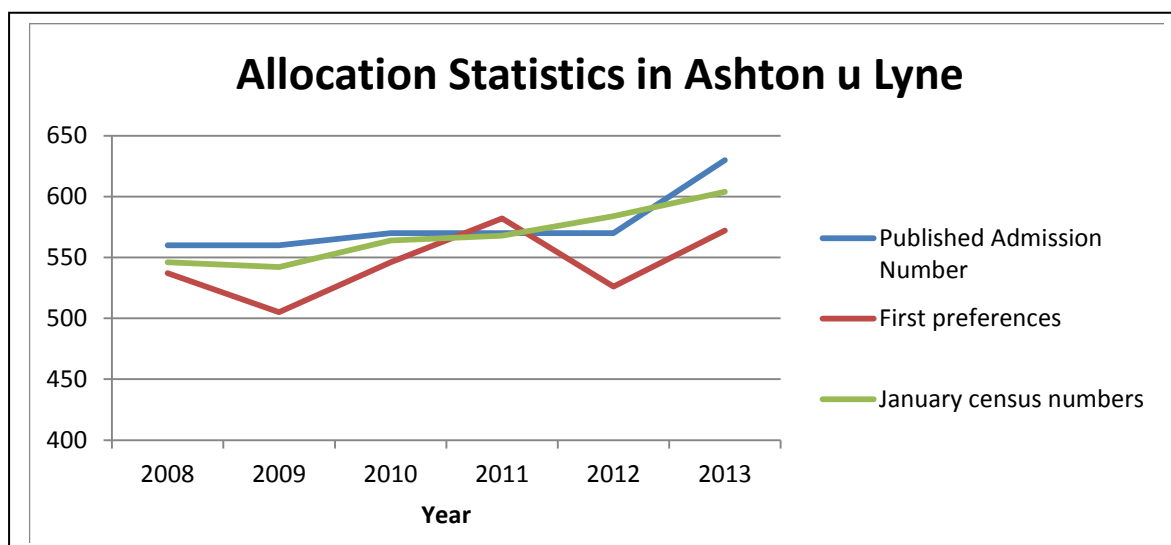
Source Census 2011

4.4 Within the community where it is proposed to open the new school, there are very high levels of households without access to their own transport which is likely to limit the distance that parents wish to travel with their children for a school place. The high levels of housing that is rented is likely to lead to high levels of pupils mobility with families moving into and out of the area. This will be difficult to accommodate without additional places in the area.

5. DEMAND FOR NEW ASHTON PRIMARY SCHOOL

5.1 Over the last four years, Ashton has had an increase of 40 permanent places per year group and 90 temporary places implemented through three bulge classes, one at The Heys and one for two years at Rosehill. As can be seen from the attached maps of the area, the proposed site of the new school is sandwiched in between Rosehill and The Heys primary schools.

5.2 The table below shows that over recent years, there are currently just sufficient places in the four wards to meet demand. The temporary increase in numbers are only for two intake years and in September 2015, without a new two form entry school, there will be insufficient places in the Ashton for the predicted Reception intake.



5.3 There are usually fewer than ten surplus places in Ashton across the whole of Key Stage 1 and so in year transfers, particularly groups of siblings moving in to the borough, are almost impossible to accommodate in a single school. The table below shows place availability for Key Stage 1 in Ashton as at the school census date in January 2013:

School Name	Admission Number	R	1	2
The Heys Primary School	30	31	31	30
Ashton West End Primary School	45	45	47	46
Waterloo Primary School	60	61	60	56
Holden Clough Primary School	30	32	30	30
Broadoak Primary School	45	45	42	46
Rosehill Methodist Primary	60	61	58	60

Hurst Knoll St James' Church of England	30	32	30	29
Parochial Church of England	30	30	29	32
St James Church of England	30	32	29	30
Canon Johnson Church of England	30	30	30	30
Holy Trinity Church of England	30	29	30	31
St Peters Church of England	30	29	30	31
Canon Burrows Church of England	60	64	60	61
St Christopher's Roman Catholic	30	30	30	30
Our Lady of Mount Carmel	30	33	29	30
TOTAL	570	584	565	572

- 5.4 An additional 60 temporary places have been provided at The Heys and Rosehill primary schools for September 2013, that has accommodated increased demand. It is proposed to build the new school on the site of a former secondary school. This is a large area, only part of which will be used for the new school, the rest will be sold for housing development further increasing demand for school places in the area.

6. ADMISSION ARRANGEMENTS

- 6.1 The current admission arrangements for community and voluntary controlled primary schools in the borough are as follows:

1. Looked after Children or children who have previously been looked after but immediately after being looked after became subject to an adoption, residence, or special guardianship order.
2. Children and families with exceptional medical or social needs
3. Sibling
4. All other applications on distance

- 6.2 These oversubscription criteria ensure that no single group of pupils is treated less fairly than another and that pupils are largely drawn from the local area. The data above demonstrates that there is sufficient on going demand in the area to support an additional 420 place school once the published admission numbers at neighbouring schools are reduced as the temporary increases work through the schools.

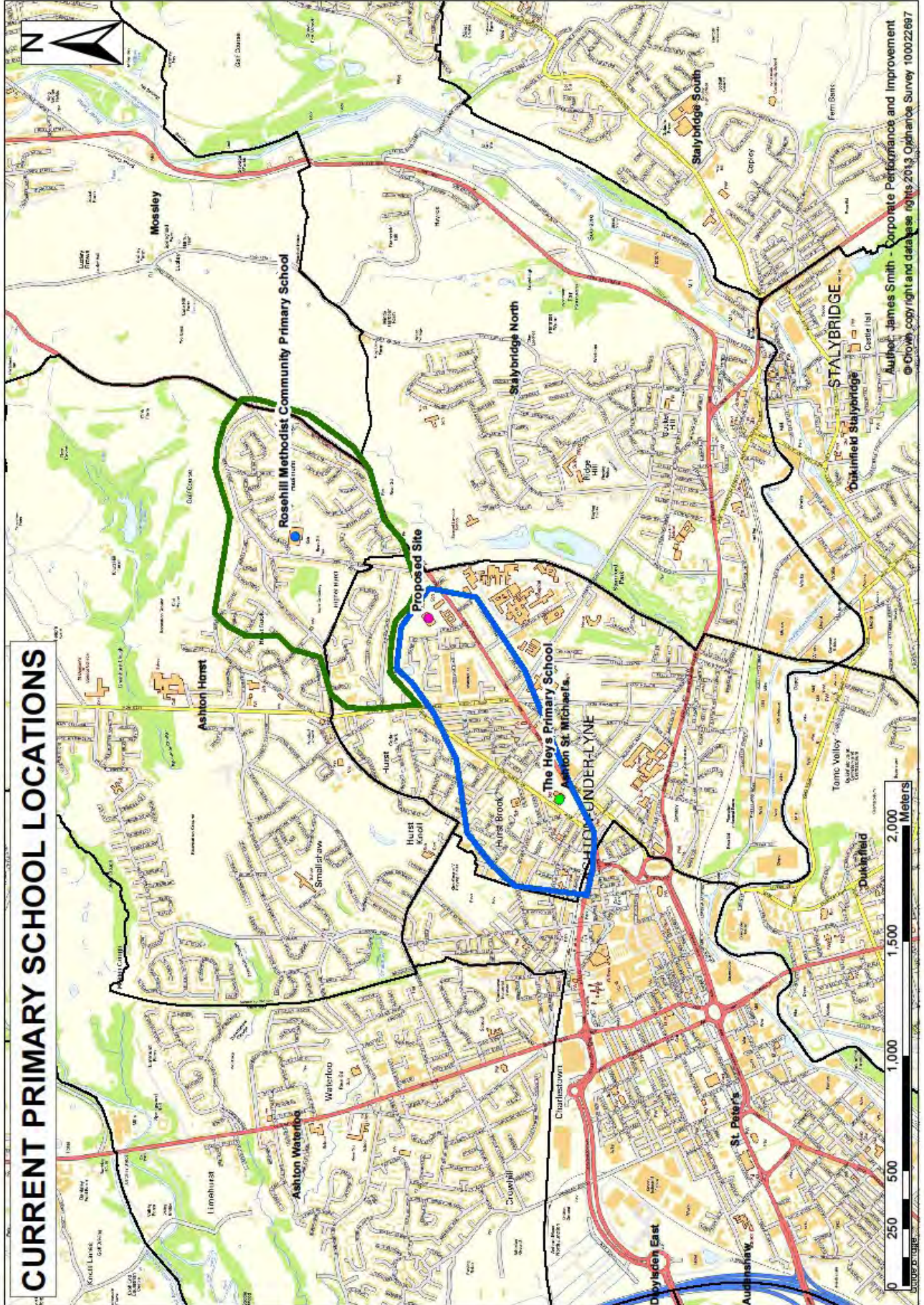
- 6.3 It is hoped that any academy sponsor will continue to use the same criteria for allocating places. However, if other criteria are adopted, this could have an impact on specific parent and pupil groups. For example, a faith school would have an impact much wider than the nearest schools as it is likely that pupils from a wider area will be attracted to the school.

7. SUMMARY

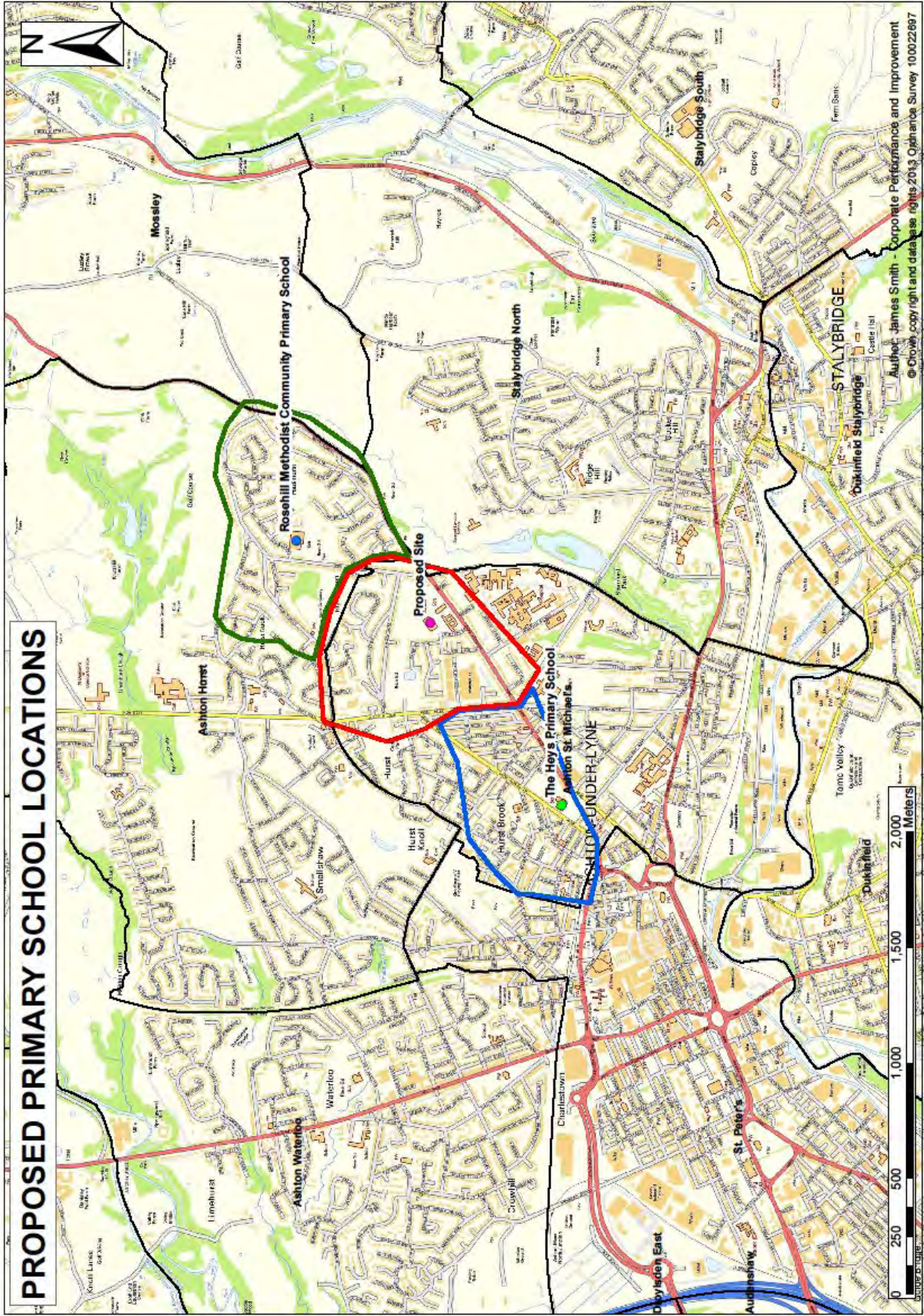
- 7.1 The proposed new school is in a densely populated area where there are significant demographic factors that are likely to have an impact on the school parents would like their children to attend, including language, disability, worklessness, access to housing and community.

- 7.2 Within the vicinity of the proposed new school, there are currently 60 temporary places for September 2013 and 30 temporary places for September 2014, to meet demand. Part of the site where it is proposed to open the new school will be developed for new housing increasing the level of demand in the area. Despite fluctuations in the birth rate in the borough, demand in Ashton has remained constant and is expected to remain so as the major town in the Borough. Taking into account the factors outlines in this report, the impact on existing schools is likely to be negligible in terms of take up of places and long term sustainability.

CURRENT PRIMARY SCHOOL LOCATIONS



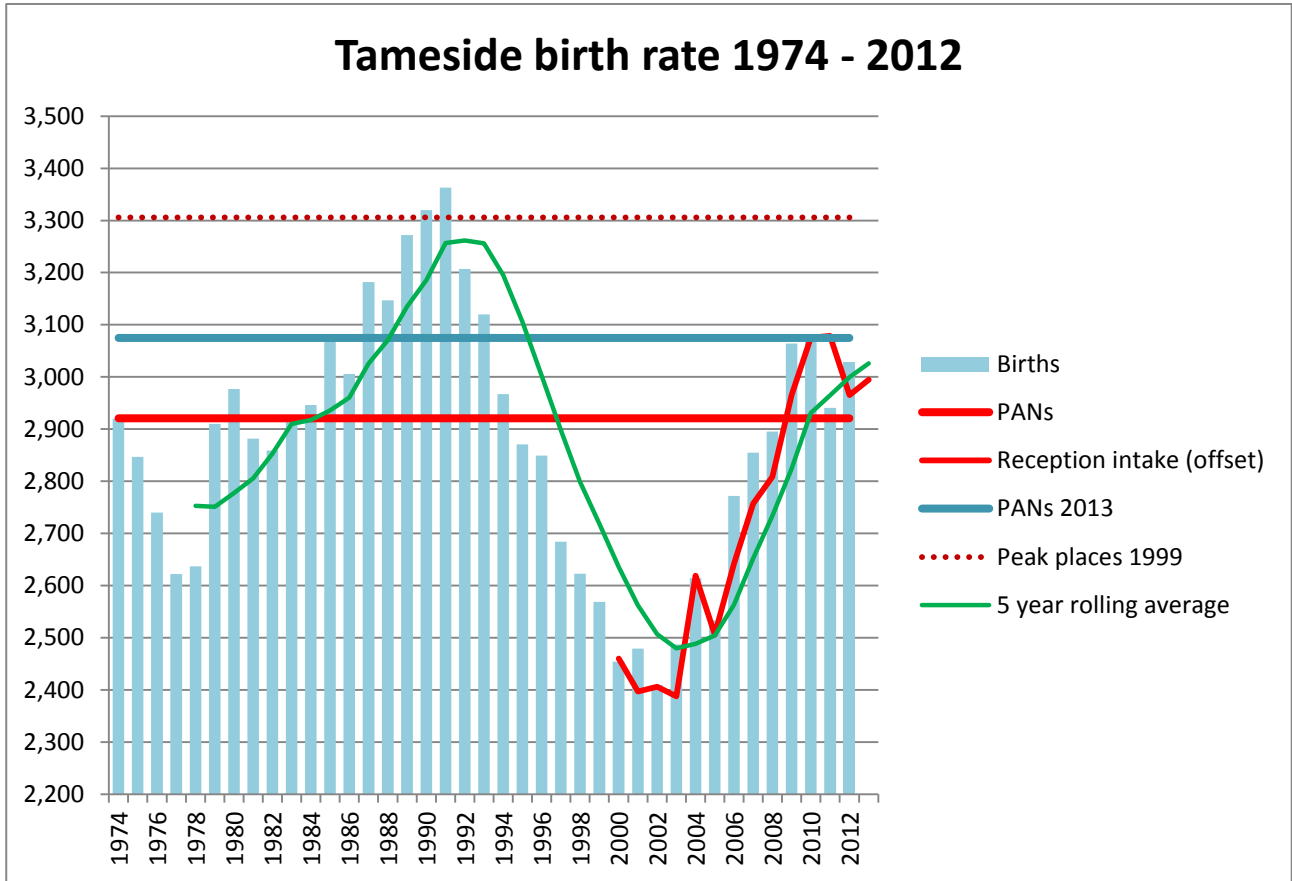
PROPOSED PRIMARY SCHOOL LOCATIONS



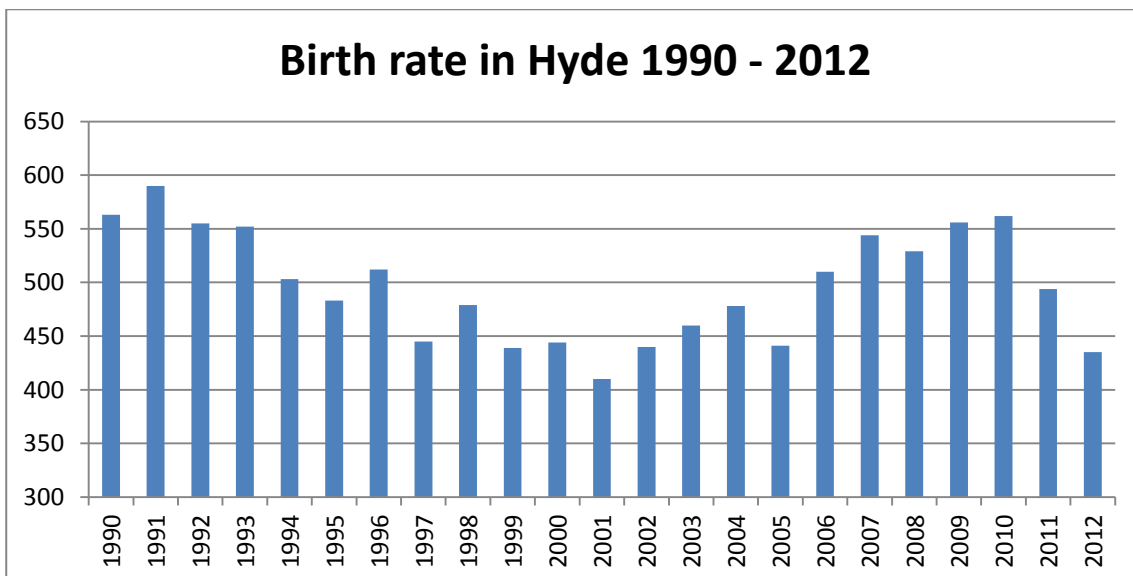
IMPACT ASSESSMENT

CURRENT DEMAND

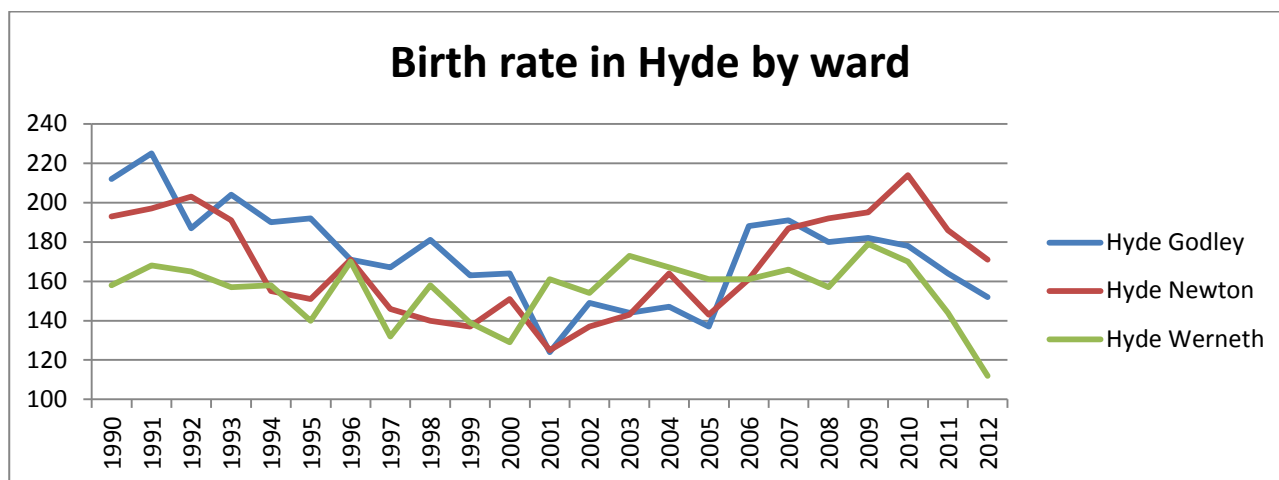
The overall birth rate in Tameside has been increasing since 2002 but escalated rapidly between 2005 and 2010 and now stands at 25.7% higher than 2002. The birth rate cycle in Tameside is approximately 25 years and the birth rate is likely to continue to increase for another 3 years so the Council is expecting the peak in 2016 for intake into primary schools in September 2020.



The birth rate in Hyde has largely mirrored that of Tameside as a whole as shown in the graph below.



There are three wards in the Hyde area and the birth rates within the three wards can fluctuate between years as shown below.



Whilst there was a noticeable decrease in births in 2012, between 2001 and 2011, there had been significant increases in the birth rate in both Hyde Godley and Hyde Newton as shown in the table below and at a greater rate than Tameside as whole. It is proposed to increase the places in Hyde Godley ward.

	% increase in birth rate	
	2001 - 2012	2001 - 2011
Hyde Godley	22.6%	32.3%
Hyde Newton	36.8%	48.8%
Hyde Werneth	-30.4%	-10.6%
Hyde Total	6.1%	20.5%
Tameside Total	22.2%	18.6%

COHORT SURVIVAL RATE

School place planning takes into account a number of factors when looking at the number of school places needed to meet the Council's statutory responsibility of having a school place for all pupils of compulsory school age resident in the borough. Planning need takes into account the birth rate, in borough movement and the level of new housing within the borough to give an overall cohort survival rate ie the number of pupils expected to require a school place. A five year rolling average of the cohort survival rate has been found to be the most accurate in predicting future demand for places. Currently, the overall cohort survival rate in the borough is 97.5% but this varies between towns from 84.8% to 151.4% as demonstrated in the table below.

Average intake to birth rate	2009/10	5 yr rolling average	2010/11	5 yr rolling average	2011/12	5 yr rolling average	2012/13	5 yr rolling average
Ashton	86.7%	85.0%	76.5%	82.8%	81.4%	83.8%	87.5%	84.8%
Audenshaw	162.6%	138.0%	152.7%	144.9%	150.4%	144.4%	156.8%	151.4%
Denton	106.2%	112.7%	110.6%	112.3%	120.3%	114.3%	118.6%	115.9%
Droylsden	113.0%	102.7%	97.1%	102.7%	104.8%	104.2%	125.8%	108.1%
Dukinfield	104.0%	113.2%	129.9%	118.6%	119.7%	116.6%	113.7%	117.1%
Hyde and Longdendale	93.4%	89.0%	85.4%	87.8%	84.3%	87.6%	86.6%	87.5%
Mossley	89.3%	89.1%	92.1%	88.7%	86.4%	87.6%	84.2%	87.9%
Stalybridge	89.6%	91.8%	88.7%	91.1%	89.5%	91.3%	98.2%	91.5%
Tameside	98.9%	97.4%	95.3%	97.1%	97.2%	97.5%	96.0%	97.5%

Additionally, Tameside is predicting that it needs to build an additional 8,000 houses over the next 10 years to meet demand. Based on national information, Tameside Council uses a scaling factor of 0.03 to predict the number of pupils per year group that housing developments will generate. This means that approximately 240 additional places per year group will be needed on top of increased demand from a rising birth rate. Whilst it can be seen that the Borough's birth rate fluctuates over a 25 year cycle, increased housing will lead to a permanent increase in the number of school places needed.

The area around the proposed new places is an area of strategic importance for residential development in the borough. The regeneration of Hattersley has been a strategic priority for the Council and the local community for many years and following the transfer of housing stock to Peak Valley Housing Group in 2006 and significant investment in the existing property, this is now underway. Within the next 12 years, it is proposed to build up to 1500 residential units within the ward boundary. Using the above scaling factor, this is expected to generate an additional 45 pupils per year group in the area.

PRIMARY SCHOOL PLACES

The Council has been proactive in tackling the issue of rising births over recent years. The Published Admission Number (PAN) has been permanently increased at many schools and a number of temporary increases using bulge classes have been implemented.

The following table provides details on the number of primary places that have increased each year in line with the increase to the birth rate.

	09/10	10/11	11/12	12/13	13/14	14/15	15/16	Total
Permanent		68	105	10	13	85	90*	371
Temporary					155	95		250
Total Places	2734	2802	2907	2917	3085	3110	3105	561

*new Targeted Basic Need Schools in Ashton and Hyde

Places are further identified by school and ward area for each intake year

2010 Increases to Published Admission Numbers

School	Ward	Increase	Total Number of places
Waterloo	Ashton Waterloo	50-60	10
Gresswell	Denton North East	51-60	9
Russell Scott	Denton North East	51-60	9
Fairfield Road	Droylsden East	30-45	15
Manchester Road	Droylsden West	45-60	15
Bradley Green	Hyde Newton	20-30	10
		Total	68 Permanent Places

2011 Increases to Published Admission Numbers

School	Ward	Increase	Total Number of places
Poplar Street	Audenshaw	45-60	15
Corrie Primary	Denton South	45-60	15
Fairfield Rd	Droylsden East	45-60	15
Yew Tree	Dukinfield/Stalybridge	60-70	10
Greenfield	Hyde Godley	40-45	5
Arlies	Stalybridge North	30-45	15
Millbrook	Stalybridge North	25-30	5
Wild Bank	Stalybridge South	20-30	10
Ridgehill	Stalybridge North	45 -60	15
		Total	105 Permanent Places

2012 Increases to Published Admission Numbers

School	Ward	Increase	Total Number of places
St James	Hyde Godley	20 – 30	10
		Total	10 Permanent Places

2013 Increases to Published Admission Numbers

School	Ward	Increase	Total Number of places
Godley	Hyde Godley	30-60	30 (Temporary)
Flowery Field	Hyde Newton	60-90	30 (T)
Rosehill	Ashton Hurst	60-90	30 (T)
Lyndhurst	Dukinfield	30-60	30 (T)
The Heys	Ashton St Michael's	30-60	30 (T)
St John Fisher	Denton South	26-30	4
St Raphael's	Stalybridge South	26-30	4
Buckton Vale	Stalybridge North	40-45	5
St Josephs	Mossley	20-25	5 (T)
		Total	13 Permanent Places
		Total	155 Temporary Places

2014 Increases to Published Admission Numbers

School	Ward	Increase	Total Number of places
Flowery Field	Hyde Newton	Stay at 90 prior to new build	30
Holden Clough	Ashton Hurst	30-60	30
Linden Road	Denton North East	30-60	30 (T)
St Johns	Dukinfield/Stalybridge	30-45	15
St Pauls	Hyde Newton	30-60	30 (T)
Rosehill	Ashton Hurst	Stay at 90 1 further intake	30 (T)
St Josephs	Mossley	20-25	5 (T)
Yew Tree	Dukinfield/Stalybridge	70-75	5
Broadbottom	Longdendale	15-20	5
		Total	85 Permanent Places
		Total	95 Temporary Places

Total Number of places for each Ward

Ward	Total Number of Permanent Places	Total Number of Temporary Places
Ashton Waterloo	10	0
Ashton Hurst	30	60
Ashton St Michael	60 (new Ashton school)	30
Ashton St Peter's	0	0
Audenshaw	15	0
Denton North East	18	30
Denton South	19	0
Denton West	0	0
Droylsden East	30	0
Droylsden West	15	0
Dukinfield	0	30
Dukinfield/Stalybridge	30	0
Hyde Newton	40	60

Ward	Total Number of Permanent Places	Total Number of Temporary Places
Hyde Godley	45 (additional 30 places)	30
Hyde Werneth	0	0
Longdendale	5	0
Mossley	0	10
Stalybridge North	40	30
Stalybridge South	14	0
Total	371	250

LOCAL DEMOGRAPHICS

The following data is taken from the 2011 census to give a profile of the area where it is proposed to open the new school. As can be seen, the area is socio-economically diverse.

DEMOGRAPHIC		NEIGHBOURHOOD / COMMUNITY		
		Hattersley	Wider (part of Godley)	TAMESIDE
CONTEXT	Total Population	4,534	1,809	219,324
GENDER	Male	48%	50%	49%
	Female	52%	50%	51%
AGE	0-4 years	9%	5%	7%
	5-9 years	7%	5%	6%
	10-59 years	63%	71%	66%
	60 years and over	21%	19%	22%
	Median Age	36	42	39
MARITAL	Single (incl. divorced / widowed)	67%	43%	56%
	Married	33%	57%	44%
	Registered same-sex civil partnership	6	4	326
HOUSEHOLDS	All households	2,011	675	94,953
	Lone parent, with dependent children	15%	6%	9%
	No adults in employment with dependent children	13%	1%	5%
	Long term health problem and dependent children	9%	3%	5%
MIGRATION	Residents born outside of UK	4%	3%	7%
ETHNICITY	White	96.5%	96.9%	90.9%
	Mixed	1.3%	0.9%	1.4%
	Asian	1.1%	1.9%	6.6%
	Black	0.8%	0.2%	0.8%
	Other	0.2%	0.1%	0.2%
	<i>White Other</i>	<i>1.0%</i>	<i>1.2%</i>	<i>1.7%</i>
	<i>Indian</i>	<i>0.4%</i>	<i>0.1%</i>	<i>1.7%</i>

		NEIGHBOURHOOD / COMMUNITY			
		Hattersley	Wider (part of Godley)	TAMESIDE	
DEMOGRAPHIC					
	<i>Pakistani</i>	0.3%	0.6%	2.2%	
	<i>Bangladeshi</i>	0.3%	1.1%	2.0%	
	<i>Born in Poland</i>	%	0.6%	0.2%	0.8%
		No	26	4	1,696
LANGUAGE	No-one in household has English as main language	%	1%	0%	2%
		No	22	3	2,223
CARERS	Providing unpaid care	11%	11%	11%	
RELIGION	Christian	58%	70%	64%	
	Hindu	0%	0%	1%	
	Muslim	1%	2%	4%	
	Other	0%	0%	1%	
	No religion	34%	22%	24%	
	None stated	6%	6%	6%	
DISABILITY	Day to day activities limited a lot	16%	6%	11%	
SOCIO-ECONOMIC CONTEXT					
Skills	Persons with no qualifications (aged 16+)	46%	15%	28%	
Mobility	Households without access to car/van	77%	5%	29%	
Housing tenure	Homes owned	35%	93%	64%	
	Homes social landlord	59%	1%	22%	
	Homes private landlord	6%	6%	14%	
Housing type	Detached/semi-detached	24%	87%	50%	
	Terraced	64%	9%	36%	
	Flats/apartments	12%	3%	14%	
Economically active	Male	60%	81%	73%	
	Females	40%	19%	64%	

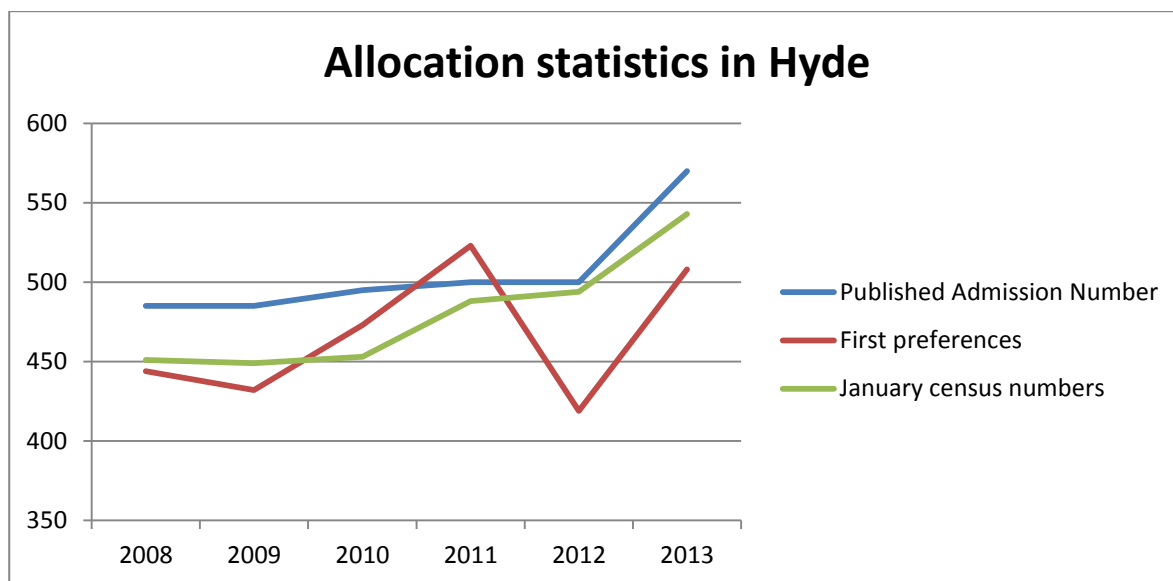
Source : Census 2011.

Within the community where it is proposed to put the additional places, the demographics largely mirror Tameside averages. There are a larger than average number of people for whom day to day activities are limited due to disability. There are significant socio-economic issues in the Hattersley/Hyde area. A large percentage of people have no qualifications and do not have access to a car/van and the percentage of people who are economically active in the Hattersley/Hyde area is significantly less than the Tameside average. Over 60% of housing in the area is rented which is substantially larger than the Tameside average whereas the wider area has much larger home ownership than Tameside as a whole. The high levels of housing that is rented is likely to lead to high levels of pupils mobility with families moving into and out of the area. This will be difficult to accommodate without additional places in the area and is also likely to have an impact on the distance parents will travel to a school for their children.

DEMAND FOR ADDITIONAL PLACES IN HYDE

Over the last four years, Hyde has had an increase of 55 permanent places per year group and 90 temporary places implemented through three bulge classes, one at Flowery Field, one at Godley and one at St Paul's RC primary schools.

The table below shows that over recent years, there are currently just sufficient places in the three wards to meet demand. The temporary increase in numbers are only for two intake years and in September 2015, without additional places, there will be insufficient places in Hyde for the predicted Reception intake.



There are few surplus places in Hyde across the whole of Key Stage 1 and so in year transfers, particularly groups of siblings moving in to the borough, are almost impossible to accommodate in a single school. The table below shows place availability for Key Stage 1 in Hyde as at the school census date in January:

	School Name	Admission Number	R	1	2	KS1 total
Hattersley	Pinfold Primary School	60	57	60	43	160
Hattersley	Arundale Primary School	30	29	25	15	69
Hattersley	St. James Catholic Primary School	30	28	24	19	71
	TOTAL	120	114	109	77	300
Hyde	Greenfield Primary School	45	34	38	38	110
Hyde	Oakfield Primary School	30	30	30	29	89
Hyde	Flowery Field Primary School	60	59	57	60	176
Hyde	Bradley Green Primary School	30	30	29	26	85
Hyde	Dowson Primary School	60	62	60	60	182
Hyde	Godley Primary School	30	31	30	31	92
Hyde	Leigh Primary School	45	42	45	44	131
Hyde	Gee Cross Holy Trinity	30	30	30	30	90
Hyde	St. Georges Church of England	30	30	29	30	89
Hyde	St. Pauls Catholic Primary School	30	32	30	29	91
	TOTAL	390	380	378	377	1135
	Hyde and Hattersley total	510	494	487	454	1435

An additional 60 temporary places have been provided at Flowery Field and Godley primary schools for September 2013 that has accommodated increased demand.

ADMISSION ARRANGEMENTS

The current admission arrangements for community and voluntary controlled primary schools in the borough are as follows:

1. Looked after Children or children who have previously been looked after but immediately after being looked after became subject to an adoption, residence, or special guardianship order.
2. Children and families with exceptional medical or social needs
3. Sibling
4. All other applications on distance

These oversubscription criteria ensure that no single group of pupils is treated less fairly than another and that pupils are largely drawn from the local area. The data above demonstrates that there is sufficient on going demand in the area to support an additional 420 place school once the published admission numbers at neighbouring schools are reduced as the temporary increases work through the schools.

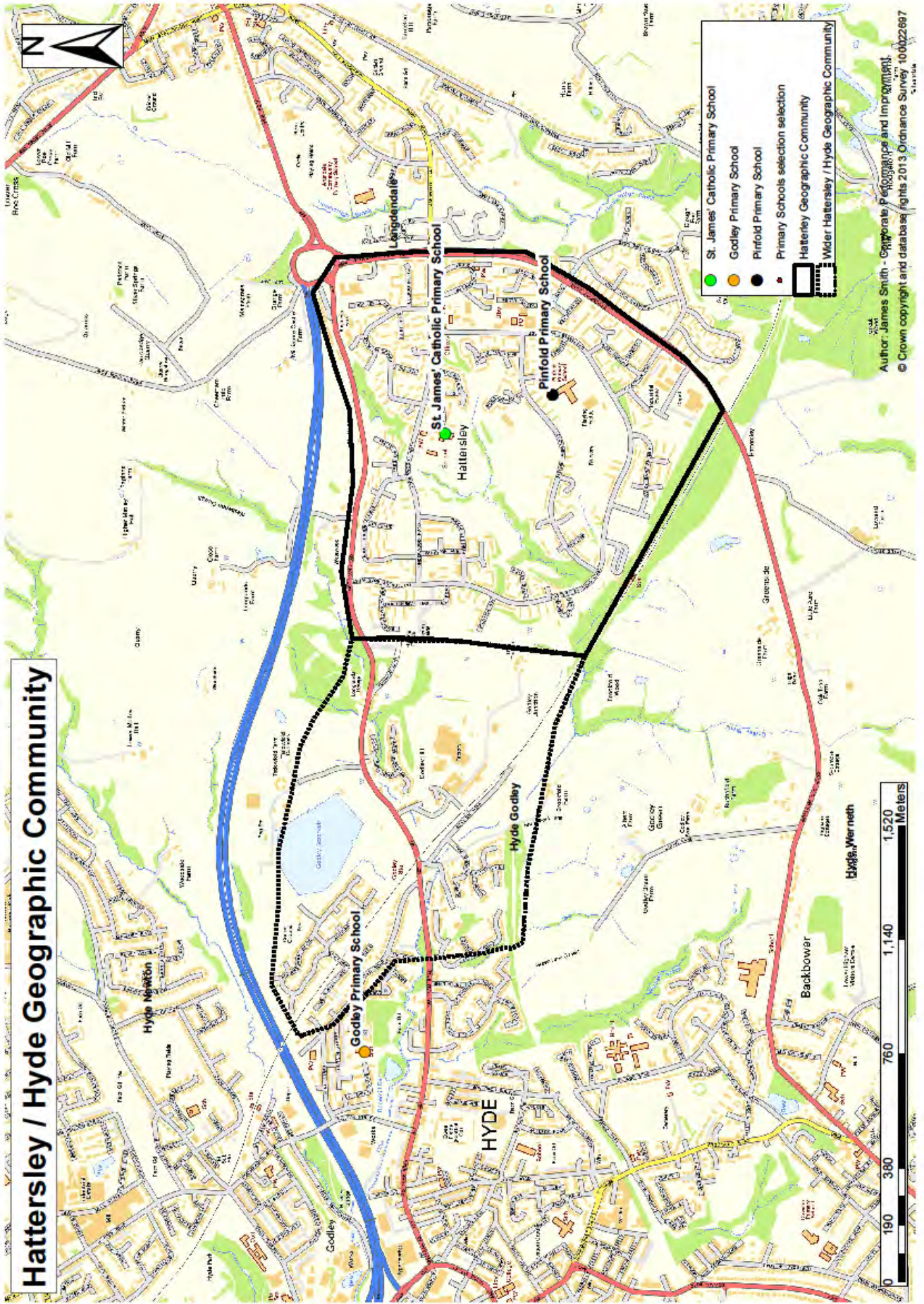
It is hoped that any academy sponsor will continue to use the same criteria for allocating places. However, if other criteria are adopted, this could have an impact on specific parent and pupil groups. For example, a faith school would have an impact much wider than the nearest schools as it is likely that pupils from a wider area will be attracted to the school.

SUMMARY

The proposed additional places are in an area where there are currently, just sufficient places to meet current demand. The area has significant demographic factors that are likely to have an impact on the school parents would like their children to attend, including language, disability, worklessness and access to housing. Within the vicinity of the proposed additional places, there are currently 30 temporary places for September 2013 to meet demand. Despite fluctuations in the birth rate in the borough, demand in Hyde has remained constant and is expected to remain so one of the major towns in the Borough.

The extensive residential development in the area is predicted to result in increased pupil numbers in the area and is also likely to alter the overall socio-economic context in future years. Taking into account the factors outlines in this report, the impact on existing schools is likely to be negligible in terms of take up of places and long term sustainability.

Hattersley / Hyde Geographic Community





Education
Funding
Agency

Education Funding Agency

Capital Group

33 Greycoat Street

London

SW1P 2QF

Elaine Todd

Assistant Executive Director

Tameside

Sent by email

1 August 2013

Dear Colleague

TARGETED BASIC NEED CAPITAL PROGRAMME

As confirmed in the letter dated 18 July 2013 from Susan Acland-Hood we have now finished assessment of all applications to the Targeted Basic Need Capital Programme and your successful application(s) are as detailed in the attached Funding Agreement Annex B(s).

Expansion Projects

All funding for expansion projects is subject to the appropriate statutory processes being followed for school expansions. This funding approval does not infer permission has been granted for the expansion.

A Funding Agreement for Expansion Projects is enclosed. Annex B (Expansion Projects) details your provisional funding allocations for expansion projects.

Once any adjustments have been made, as necessary (see Adjustment of Funding section below), please return the signed, dated and scanned Annex B and C of the Funding Agreement to the email address below. If no changes are required please return this by 16 August.

Project Support Funding for expansion projects will be paid as a one off lump sum (in addition to the Funding) on receipt of the signed Funding Agreement.

New Schools

All funding for new schools is subject to successful transition through the academy presumption process. The academy presumption guidance can be found at: www.education.gov.uk/schools/leadership/schoolorganisation/f00209212/academy-free-school-presumption. The timetable for completing this process is attached to this letter for ease of reference. It is important that you meet these deadlines to secure funding.

You may consider both existing and new sponsors for each new school but please be aware that new sponsors must go through the department's sponsor approval

process. You should make this clear when you publish your specifications. Details of the process can be found on the department's website. The deadline for new sponsors to send their applications for approval to the department is 6 September.

An indicative Funding Agreement for New Schools is enclosed for information only at this stage. Annex B (New Schools) details your provisional funding allocations for new school projects.

Once you have completed the academy presumption process and have appointed a sponsor and we have agreed any changes to the Provisional Funding (see Adjustment of Funding section below) a final Funding Agreement will be issued per academy. The signed, dated and scanned Annex B and C of the Funding Agreement must then be returned to the email address below.

Project Support Funding for New Schools will be paid per school (in addition to the main capital Funding) on receipt of the completed Adjustment of Funding form (see below)..

Adjustment of Funding

The attached Adjustment of Funding form must be completed for all schools and be returned by 16 August to enable funding allocations to be finalised and Project Support Funding to be issued. If any funding adjustments are required the relevant adjustments will be made and the Funding Agreement Annex B(s) reissued.

The Provisional Funding allocation(s) provided in Annex B of the attached Funding Agreement(s) assume new build. Should your proposal include any refurbishment of existing buildings you must notify us using the Adjustment of Funding form along with any supporting information so we can consider and request further information as necessary.

Some local authorities have stated that they will provide funding towards the projects if successful; you must notify us using the Adjustment of Funding form if this applies to any of your projects and confirm the funding contribution relevant to your successful projects so we can make an adjustment in funding.

You must confirm in the Adjustment of Funding form that the pupil places stated in the application are completely new places and do not currently exist in any form; where this is not the case, funding will be reduced accordingly.

In accordance with the School Standards and Framework Act 1998, Voluntary Aided Schools will only be awarded 90% of their capital funding the remaining 10% being the responsibility of the school's foundation. You must confirm in the Adjustment of Funding form if any allocated funding relates to Voluntary Aided Schools so we can make an adjustment in funding.

Please note that Local Authorities will be required to return any underspend or surplus funds in accordance with the attached Funding Agreement.

Adjustment of Cashflow Profile

Annex B details the provisional cashflow profile for your project(s). The cash flow profile is based on:

- The provisional funding allocation;

- Payment of the Project Support Funding on receipt of the appropriate Funding Agreement, in 2013-14;
- 24.3% of other funding allocated in 2013-14 on a quarterly basis; and
- 75.7% of other funding allocated in 2014-15 on a quarterly basis.

In accordance with the Funding Agreement, all money must be fully expended by 31 August following the financial year in which the grant is paid.

We consider that this cashflow profile is appropriate and manageable for most projects. If, exceptionally, you require a different cash flow profile please complete the Adjustment of Cashflow Profile form. We need to balance the individual project requirements with cash flow constraints across the programme and so cannot guarantee that requests can be agreed, particularly across financial years.

The email address for all correspondence, queries and return of Adjustment of Funding forms, Adjustment of Cashflow Profile forms and Funding Agreements is tbnp.EFACAPITAL@education.gsi.gov.uk

The EFA is responsible for monitoring and managing the programme and will issue monitoring returns to local authorities on a regular basis which must be completed and returned within stated deadlines. In addition once the Funding Agreement is signed we will require more detail on the proposed approach to project management; further details will be provided.

Yours sincerely



Sally Wiseman

Deputy Director, Targeted Capital Programmes

cc Stephanie Butterworth, Director of Children's Services

Timetable for academy presumption process proposals under the Targeted Basic Need Programme

DfE informs LAs of provisional targeted basic need funding allocations	By 18 July 2013
LA should publish specification inviting proposals to establish new academy/free school (NB the LA will need to notify the DfE of all proposals by 4 October so should set its own deadlines accordingly)	By 2 August 2013
LAs should alert the DfE to any expressions of interest they have received from potential proposers*	By 23 August 2013
New sponsor approval applications to the DfE	By 6 September 2013
DfE will provide feedback on expressions of interest	By 6 September 2013
LA should inform DfE of all proposals received	By 4 October 2013
LA should submit assessment of proposals to DfE indicating any preference(s)	By 18 October 2013
DfE confirm sponsor and funding allocations for new academy	By 12 December 2013

*This will enable the DfE to let LAs know where the Secretary of State is minded not enter into a Funding Agreement with a particular proposer.



TARGETED BASIC NEED PROGRAMME 2013-15

GRANT FUNDING AGREEMENT FOR LOCAL AUTHORITIES IN RECEIPT OF CAPITAL GRANT

1 AUGUST 2013

Introduction

1. This Funding Agreement sets out the terms and conditions for the payment by the Secretary of State for Education of a grant to the respective Local Authority out of monies voted by Parliament. It should be read in conjunction with the grant approval letter and any annexes.
2. For the purposes of this Funding Agreement:

'Secretary of State' means the Secretary of State for Education;
'the Department' means the Department for Education;
'the EFA' means the Education Funding Agency
'financial year' means the 12 months from 1 April to 31 March;
'grant' means monies made available by the EFA.

Amount and Purpose of Grant

3. The project being funded, including the value of the grant, is described in Annex B to this Funding Agreement. The grant by the Secretary of State will be pursuant to Section 14 of the Education Act 2002 and will accordingly be paid only in respect of approved expenditure incurred by the local authority for the purpose of delivering the project described in the approval letter.
4. Payment of grant shall be subject to the conditions and requirements in this Funding Agreement and to such further conditions and requirements that the Secretary of State may from time to time specify.
5. This is a capital grant and thus must be used exclusively for capital expenditure. Examples of capital expenditure are in Annex A. If there is any doubt about whether expenditure can be funded from this grant, the authority should seek local advice (e.g. from auditors).

General terms and conditions

6. The Local Authority will be required to deliver the agreed project. The Local Authority is responsible for putting in place appropriate information, monitoring and internal reporting systems to secure delivery and which ensure that the funding provided by the EFA is spent on the agreed project and in line with the terms and conditions of grant.

7. The Local Authority must seek prior approval from the Secretary of State before committing to additional costs, not covered by the original approval letter. Such approval may be withheld.
8. The approved funding for the relevant financial year should be fully expended by 31 August following the financial year in which the grant is paid. Any underspend or surplus funds after the completion of the projects should be notified and will be subject to reclaim by EFA. It is not intended to allow surplus funding to be used to extend the scope of projects or to deliver other projects.
9. The EFA and/or its representatives will monitor the progress being made in respect of delivering the project. If progress is deemed unsatisfactory or there is significant alteration to the specification and outputs described in the project bid, following discussion with the Local Authority, the EFA and/or its representatives, reserve the right to suspend or withdraw funding for the project.

Payment of grant (Scheduled Funding)

10. The total amount of grant paid to the Local Authority will not exceed the amount of funding shown in Annex B of this Funding Agreement. The grant is calculated net of VAT.
11. The proposed funding profile is shown at Annex B which is intended to provide funding as the requirement arises rather than in advance of need. Local Authorities should take account of VAT requirements in the phasing of the funding requirement profile.
12. The EFA and/or its representatives will pay the agreed allocation in accordance with the agreed profile. Funding profiles can be kept under review and may be revised following a reasonable request from the LA. The EFA reserves the right to vary the funding profile if it considers appropriate.
13. If the project is dependent on other sources of funding to complete this project, then the LA must take appropriate action to ensure that this third party funding will be received and applied to the project to the agreed schedule. The EFA will not play any role in supporting the LA's ability to secure the third party funds. If the project is not completed due to shortage of third party funding, the whole of the grant paid to date to the LA may be repayable to the EFA.

Procurement and contractual issues

14. The Local Authority shall follow appropriate legal requirements and best practice in regard to all aspect of this project including (but not limited to) the procurement of goods and services in support of delivering the agreed project, processes for managing the project, governance and internal control systems, managing conflicts of interest and record keeping.
15. The Local Authority is responsible for entering into contracts and agreeing specifications of works that are appropriate to secure the outputs set out in the original project proposal and ensuring that the works undertaken are delivered to quality standards and will have a lasting benefit to the school and community. The EFA will not provide additional funding to rectify substandard work relating to the project.

Accountability

16. The Local Authority shall ensure that any grant from the Secretary of State is used only in accordance with the terms of this Funding Agreement and on the project described in the associated approval letter. If the Local Authority does not comply with any of the conditions and requirements referred to in this Funding Agreement, or the project does not accord with the original specification or has not been completed, then the Secretary of State retains the right to stop future funding and by notice in writing require the Local Authority to repay all or any part of grant paid to it under this Funding Agreement.
17. The Section 151 Officer of the Local Authority will be required to complete an "End of Financial Year Outturn Certificate", at the end of the financial year. This will confirm that the funds have been applied for the purposes provided, and spent in accordance with the terms and conditions of grant. The EFA will send the "End of Financial Year Outturn Certificate" in the September following the end of the financial year in which the grant is paid with instructions for signature and return.

Audit arrangements

18. The books and other documents and records held by the Local Authority relating to the expenditure of this capital grant shall be open to inspection by the Secretary of State, his representatives and by the Comptroller and Auditor General (National Audit Office) as necessary.

Disposal of assets and change of use

19. The Local Authority shall consult the Secretary of State if it proposes to dispose of, or change the use of, an asset which has been financed wholly or developed with grant from the Secretary of State or which has been substantially improved by the use of such funds.

Changes to the EFA's requirements

20. The EFA will notify you of any changes to the EFA's activities which are supported by the grant. You will try to accommodate any changes to the needs and requirements of the EFA under this Grant Agreement.

Amendment or variation or termination of the grant

21. No amendment or variation to this Grant Agreement shall be effective unless it is in writing, agreed and signed by those authorised to do so on behalf of each of the parties.
22. In the event of any material breach of the Grant Agreement by either party, the other party may serve a notice on the party in breach requiring remedial action to be taken within a specified period, to allow a remedial plan to be agreed in writing by both parties. If the breach has not been remedied as per the remedial plan, this Grant Agreement will be terminated with immediate effect on receipt of notice in writing.
23. In the event of a change of Government or in policy direction, this Grant Agreement may be terminated by the EFA with immediate effect by notice in

writing (such notice period as will be reasonable in all the circumstances), in accordance with the above.

Transfer of Responsibility on Expiry or Termination of the Grant

24. You should provide the EFA with whatever support it needs (e.g. delivery of relevant documents and data) to ensure a smooth transfer of responsibility prior to early termination or transfer of the grant funded activities.
25. A plan detailing arrangements for the transfer of any work in progress should be delivered six months prior to expiry, or within one month of the service of notice of termination.

Consequences of termination and support for transfer of responsibility

26. Nothing in this Grant Agreement shall affect any provision of this Grant which is expressly or by implication intended to apply or continue to apply upon termination of this Grant Agreement, for any reason.
27. If the EFA terminates this Grant Agreement, in accordance with the above clause, it will pay reasonable costs incurred in respect of the services performed prior to the date of termination. Reasonable costs will be identified and agreed by the two parties as soon as possible. You should efficiently assess, and seek to mitigate these costs.
28. The EFA will not be liable to pay any of your costs or those of any subcontractor related to any transfer or termination of the employment of any employees engaged in the provision of the funded activities prior to the date of termination. Upon receiving notice of termination, you will review the agreed exit plan with the EFA.

Liability

29. The EFA makes no commitment to renewing or continuing funding after the term of this Grant Agreement. You must not assume that funding will continue beyond the period stated in the Grant Offer Letter(s) or that the EFA will be liable for any additional cost, such as to cover the costs of redundancies, pension etc. at the conclusion of this Grant Agreement.

Interpretation

30. Questions arising on the interpretation of the arrangements in this Funding Agreement shall be resolved by the Secretary of State or his representatives after consultation with the Local Authority.

Annex A – Capital Grants

Capital grants can only be used to fund capital costs.

Typical capital costs are building construction and improvements and associated fees such as architects and project managers, purchase of assets which will last a number of years such as ICT or bulk furniture.

Typical revenue costs (which capital grant can not fund) will include insurance, teaching supplies, recruitment costs, small equipment such as replacement learner desks, ICT supplies and building maintenance.

Advice should be sought from local auditors when there is a doubt about whether a cost can be charged to capital or revenue.

Funding Agreement Annex B

Targeted Basic Need Programme 2013-15 Terms and Conditions of Grant – Summary of Approved Project(s)

Date of issue – 1 August 2013

Local Authority	Tameside(New Build)
------------------------	----------------------------

School (or Post Code if New School)	Number of New Places	Provisional Funding Total (£)	Provisional Funding 2013-14 (£)	Provisional Funding 2014-15 (£)	Project Support Funding (£)	Remarks
O16 9SD	472	4,316,911	1,049,009	3,267,902	150,000	
SK14 3JZ	223	2,307,887	560,817	1,747,071	150,000	
Total	695	6,624,798	1,609,826	5,014,972	300,000	

Funding Profile Payment Month	Provisional Funding Total (£)	Project Support Funding (£)	Remarks
September 2013		300,000	Subject to timely receipt of Funding Agreement
December 2013	804,913		
March 2014	804,913		
Total 2013-14	1,609,826		
May 2014	1,253,743		

September 2014	1,253,743		
December 2014	1,253,743		
March 2015	1,253,743		
Total 2014-15	5,014,972		

Note that payments are made on or around the 21st of each month.

Funding Agreement Annex C

Declaration and Signatures

Please print, sign, scan and return Annex B and C of this Funding Agreement by email to tbnp.EFACAPITAL@education.gsi.gov.uk

By issuing this document, the Education Funding Agency (EFA), on behalf of the Department for Education, confirms that the funds detailed in this Funding Agreement have been allocated to the Local Authority for the delivery of the agreed projects and that the EFA will comply with this Funding Agreement.

By signing and returning this document, the Local Authority:

- confirms that it has notified the EFA if its proposal includes any refurbishment of existing buildings and that the funding has been adjusted in agreement with the EFA as necessary to reflect this;
- confirms that it has notified the EFA if its proposal stated that it will provide funding towards the projects if successful and that the funding has been adjusted in agreement with the EFA as necessary to reflect this;
- confirms that it has notified the EFA if its proposals are at any Voluntary Aided Schools and that the funding has been adjusted in agreement with the EFA as necessary to reflect this;
- confirms that the number of new places shown in Annex B are completely new places and do not currently exist in any form;
- agrees to comply with this Funding Agreement.

On behalf of the Local Authority named above, I accept the terms and conditions of the Targeted Basic Need Programme grant	
Signature	
Name (please print)	
Organisation	
Position in organisation	
Date	
Day to Day contact for TBNP Funding	
Contact name	
Position and organisation	
Telephone no.	
Email	

Funding Agreement Annex B

Targeted Basic Need Programme 2013-15 Terms and Conditions of Grant – Summary of Approved Project(s)

Date of issue – 1 August 2013

Local Authority		Tameside(Expansions)				
School (or Post Code if New School)	Number of New Places	Provisional Funding Total (£)	Provisional Funding 2013-14 (£)	Provisional Funding 2014-15 (£)	Project Support Funding (£)	Remarks
Samuel Laycock	60	1,677,925	407,736	1,270,189	75,000	Revised to use correct BCIS 2Q, 2014
Total	60	1,677,925	407,736	1,270,189	75,000	

Funding Profile Payment Month	Provisional Funding Total (£)	Project Support Funding (£)	Remarks
September 2013	135,912	75,000	Subject to timely receipt of Funding Agreement
December 2013	135,912		
March 2014	135,912		
Total 2013-14	407,736	75,000	
May 2014	317,547		
September 2014	317,547		

December 2014	317,547		
March 2015	317,547		
Total 2014-15	1,270,189		

Note that payments are made on or around the 21st of each month.

Funding Agreement Annex C

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- confirms that it has notified the EFA if its proposals are at any Voluntary Aided Schools and that the funding has been adjusted in agreement with the EFA as necessary to reflect this;
- confirms that the number of new places shown in Annex B are completely new places and do not currently exist in any form;
- agrees to comply with this Funding Agreement.

On behalf of the Local Authority named above, I accept the terms and conditions of the Targeted Basic Need Programme grant	
Signature	
Name (please print)	
Organisation	
Position in organisation	
Date	
Day to Day contact for TBNP Funding	
Contact name	
Position and organisation	
Telephone no.	
Email	