



EDUCATION EXECUTIVE

2010 BASE SCHOOL FORECASTS

REPORT BY HEAD OF SERVICES, SCHOOLS WITH EDUCATION SUPPORT

A. PURPOSE OF REPORT

The main purpose of this report is to inform the Education Policy Development and Scrutiny Panel of the updated 2010 base school forecast that will be used for future revenue and capital plans, pupil placement decisions, school provision planning and consultations and development plan consultations. The report also provides brief update on method changes, particularly the need to fully document and verify the forecast process for transparency and also future reference.

B. RECOMMENDATION

The Education Executive is asked to approve the following recommendations:

1. Agree the forecast update on pupil rolls, the assumptions and methodology applied in producing these data;
2. Agree the school roll forecasts as being the basis for future education provision planning and consultation on development planning; and,
3. Agree that an updated report on school forecasts will be brought to the Education Executive annually.

C. SUMMARY OF IMPLICATIONS

I Council Values

- Focusing on our customers' needs
- Being honest, open and accountable
- Providing equality of opportunities
- Making best use of our resources
- Working in partnership

II Policy and Legal (including Strategic Environmental Assessment, Equality Issues, Health or Risk Assessment)

Senior legal opinion has previously been obtained in relation to forecast methodology, reserved places and school capacity.

III Resources - (Financial, Staffing and Property)

Management of pupil placement and school capacity impinges significantly on the revenue and capital planning processes and demographic implications have been considered within the contingency strategy proposals.

IV Consultations

Queens Counsel advice was obtained on forecast methodology in February 2008. Presentation on school roll forecast methodology made to ADES, June 2008, and to school parent council representatives, January 2009. Internal consultations have taken place with finance and planning. Supplementary Planning Guidance (SPG) – Planning for Education, 25 November 2008. Education Executive, 1 September 2009. Education Policy Development and Scrutiny Panel 16, November 2010.

D. TERMS OF REPORT

Background

Medium term school primary and secondary school forecasts are critical elements in the forward planning of revenue and capital investment in West Lothian. The current base forecast cover a time range from the present school session, 2009-2010 with forecast school rolls from 2010-2011 through to 2020-2021. The updated forecasts and methodology will be used in association with the SPG on Planning for Education. It may be necessary to update the SPG from time to time to ensure its currency with the latest school forecast methodology.

There are other short term and long term methodologies that are employed to consider immediate staffing and pupil placement needs and wider population demographics that would relate more to national trends.

Medium Term School Roll Forecast Methodology

There have been no methodological changes for Session 2010. This remains as set out in the 2009 executive report.

There has been work on forecast factor tables that provide ratio information to enable these to track such things as school organisational changes, eg an infant school P1-P3 becoming a primary school. These are complex to model and some circumstances remain manual. Aspects of validating data have also been made easier to manage and also the opportunity taken to provide additional summary trend information, eg as shown at Appendix 1, Historical Housing Completions in West Lothian, 1989-2009. This clearly shows, the transformation in house building rates from the early 1990's to the turn of the millennia and the subsequent unparalleled decline in rates to 2009, even allowing for the fact that 2009 is incomplete in data terms. In explaining this data it is clear that there is a need to document all aspects of the forecast in order to ensure service continuity with this type of information.

Summary forecast information has also generally been extended. By default, the forecast summary now includes a count of all housing expected to complete within the 20 year period after the forecast. This information has then been combined with school capacity to show on an area basis, future school occupancy levels, in terms of residential development potential/constraint as well as pupils, in effect creating a planning workbook. This is illustrated at Appendix 2 for West Lothian as a whole. This shows the number of dwellings that can be supported at primary school and secondary school level, taking into account housing in the Base Audit and Housing with all Local Plan allocations included. The trend indicates that by the end of the forecast period that the number of dwellings that can be supported becomes negative, ie there is insufficient capacity. The workbook can be used at a range of aggregate levels, eg school catchment area and settlement and the effect of planned school extensions can be modelled. The workbook can also be used to quickly show where school catchment review could remove the need for extension or where new schools are the only solution to capacity restrictions. The analysis can thus be used to underpin the Evidence requirement of the SPG, Planning for Education.

Current School Roll Forecast Caveats

0-18 Year Old Population Trend

It is important to note that whilst the trend in primary school rolls has generally been downward in the current decade that this is likely to reverse over the next few years, irrespective of economic conditions as the additional potential pupils have already been born and are living within West Lothian. This trend is shown graphed at Appendix 3. Individual single year cohorts of children, or enrolment years, are increasing very substantially to 2012 and the decline thereafter is in excess of the low point reached in 2007. However, it should be noted that **if** the rapid decline in house building shown in Appendix 1 continues that this may result in ongoing decline in the number of young children. A later recovery may then result in peaks and troughs in school rolls as these tend to follow the housing trends of previous years. Setting aside the economic factors that could come to bear, the next few years should be characterised by pre-school rolls at levels higher than those experienced in recent years, primary school rolls are likely to increase as a result over the next few years and secondary school rolls, moderated by the increasing stay-on-rate, will decline in line with the recent decline in primary school rolls before rising again in some 7 years time.

There would need to be significant migration out of West Lothian for these population trends not to happen. The reverse normally holds true. Typically, the youngest cohort of children, those enrolling in 2014 would increase by around 50 pupils per annum. This would increase this cohort from 2164 currently, to 2364 pupils in 2014 and as such would represent one of the highest pupil intakes since 1998.

It is thus reasonable to assume that irrespective of the substantial, but delayed residential development in West Lothian, that the total school aged population is not likely to decrease in West Lothian, it is much more likely to be sustained or grow over the next 5 years. It is also likely that local hot spots on school capacity will remain as there appears to be no change in the underlying population structure. A recovery in the housing market will be the key as to whether there is ongoing stability or growth or whether gradual school roll decline becomes more prevalent.

Housing Allocations Post 2019

It is crucial to note the scale of housing allocations that continue post 2021, the final forecast year of the 2010 Base Forecast, particularly given the extended timeframe that the “credit crunch” has created. This circumstance applies to both housing sites with permission and also allocated housing sites. Currently some 10,300 houses are programmed beyond 2021 which indicatively equates to some 2,400 secondary school aged pupils and 4,000 primary school aged pupils. It is critical to note that any advance on the current expected programme will result in higher school rolls at an earlier time than currently forecast.

The forecast is therefore sensitive to any improvement or deterioration in economic circumstances.

Vacant property and Property for Sale

The analysis in 2008 remains relatively current. There are still relatively large numbers of vacant property and unsold property and if these properties were occupied the impact on school rolls would equate to a compact catchment area, such as Livingston Village. In general school rolls will be suppressed whilst the housing market remains sluggish.

2010 Base School Roll Forecast

A summary of the medium term school roll forecast methodology is attached at Appendix 4. A range of information is available including, total primary rolls – appendix 4(a), forecast primary one intakes – appendix 4(b), scheduled housing by secondary school – appendix 4(c), forecast secondary one intakes – appendix 4(d) and total secondary rolls – appendix 4(e).

In brief total primary rolls are forecast to increase from 14,371 pupils in school Session 2010-2011 to 18,569 pupils in school session 2021-2022 – an increase of some 4,198 pupils. A significant proportion of this growth occurs in the west of West Lothian, particularly in Armadale and Bathgate.

This scale of growth is matched by an increase in forecast P1 intakes rising from 2,090 pupils in school Session 2010-2011 to 2,743 pupils in school Session 2021-2022.

Appendix 4(c) sets out housing assumptions for the forecast period to school Session 2021-2022. It is not until 2015 that housing completions are anticipated as returning to previous levels. During this time period, completions are greatest in secondary catchments in the west of West Lothian, notably Bathgate Academy. - a combination of ongoing private development and local authority sites.

Secondary one intake's are shown on appendix 4(d) and as previously discussed dip from 2,013 pupils in the current school session 2010-2011 returning to a rising trend in 2015 of 2,131 pupils with further increases to school session 2021-2022. This latter significant increase being a combination of currently rising primary pupils and the anticipated gradual recovery in housing.

The last part of appendix 4, appendix 4(e) shows the total secondary school rolls falling from the current school Session 2010-2011, of 11,147 pupils, with rolls returning to present levels by 2015/2016 and continuing to increase towards school Session 2021-2022, ie 12,961 pupils.

Appendix 5(a) and Appendix 5(b) illustrates the impact of the secondary school catchment review involving Armadale, Bathgate, Deans and Linlithgow on the 2010 Base School Roll Forecast. The primary school associations for Seafield, Torphichen and Westfield have been amended to take account of the Education Executives decision with effect from the start of session 2011/2012. Key aims of that catchment review can be seen - demand pressure on Bathgate Academy has decreased, Deans Community High School has a more stable school roll.

It is important to note that these forecasts are the standard demand based forecasts and the numeric difference in the totals for West Lothian are a result of the differing forecast factors, eg stay-on-rates will vary for each secondary school and total pupil roll will vary accordingly.

Summary

The forecasts show a particular demand for school places notably in the west of West Lothian. The council has now completed a secondary catchment review that greatly assists in the management of the anticipated school roll growth. Ongoing catchment review is essential. The forecasts are demand led and will in reality be annually adjusted by actual placing request decisions although it will prove impossible to balance all demand without significant school catchment revisions as well as the currently proposed school extensions.

E. CONCLUSION

The updated school roll projections indicate growth in the pre-school and primary sectors over the forecast period with a period of limited decline in secondary rolls with subsequent growth after 7 years. There is a need to continue to monitor vacant properties for sale and the broader economic context in updating school rolls and projecting school capacity requirements. It is also important to review forecasts in light of any material changes in housing building completions since this is the greatest single factor influencing school roll forecasts. Further catchment review and capacity enhancement will be necessary to ensure sufficient pre-school and school places are available.

F. BACKGROUND REFERENCES

Nil.

Appendices/Attachments:

Appendix 1 – Historical House Completions

Appendix 2 – Possible Dwellings

Appendix 3 - 0-18 Population Trend by Single School Enrolment Year Cohorts 1996 - 2013

Appendix 4 – 2010 Base School Roll Forecasts

Appendix 5 - 2010 Base School Roll Forecasts amended to show transfer of Torphichen and Westfield Primary Schools to Linlithgow Academy, and Seafield to Deans Community High School.

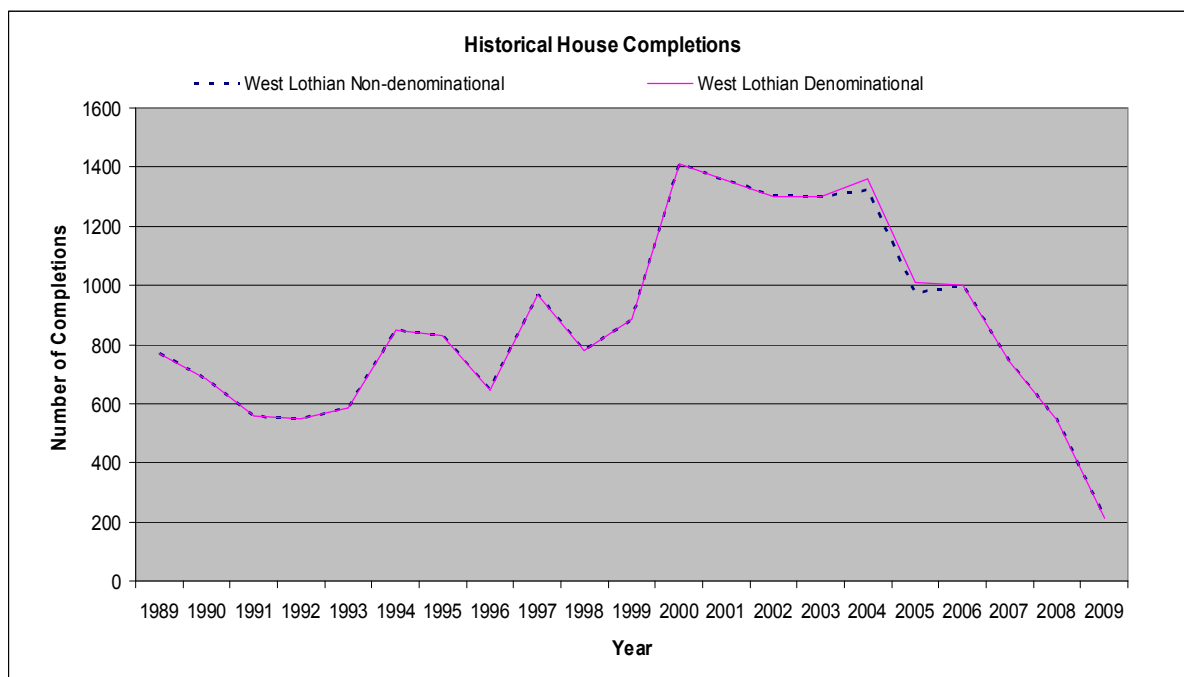
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Gordon Ford

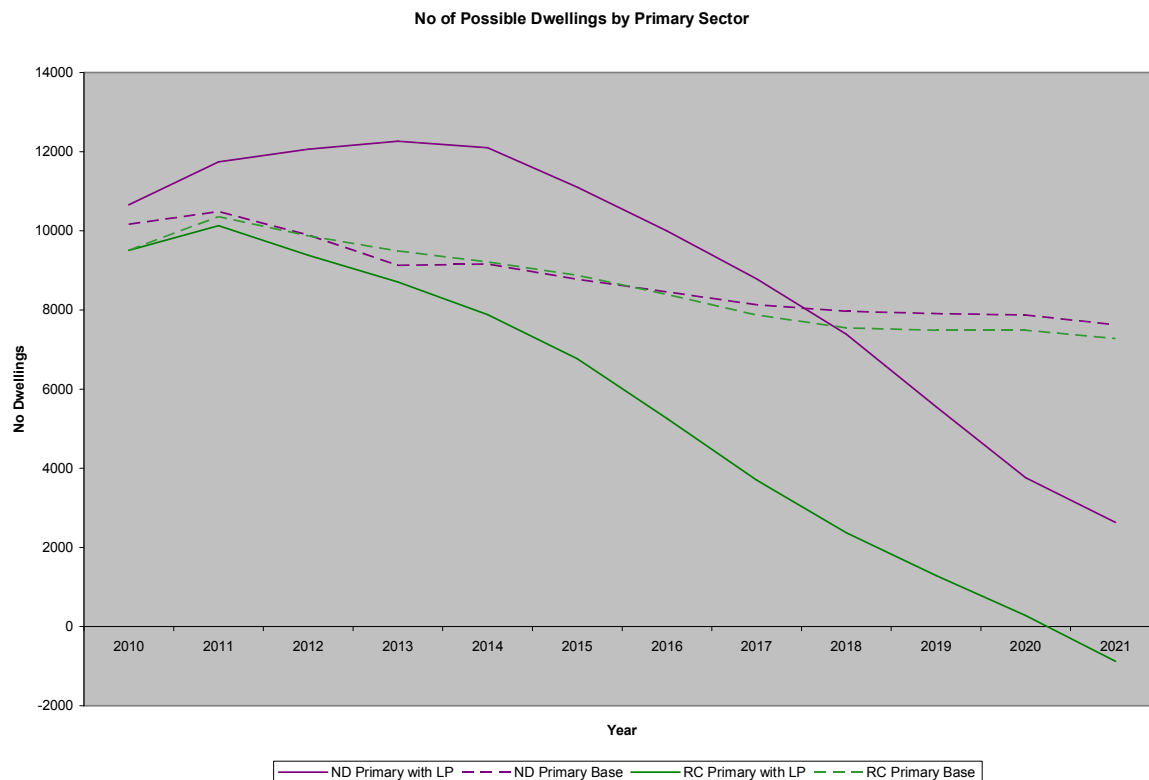
Depute Chief Executive

Date: 23 November 2010

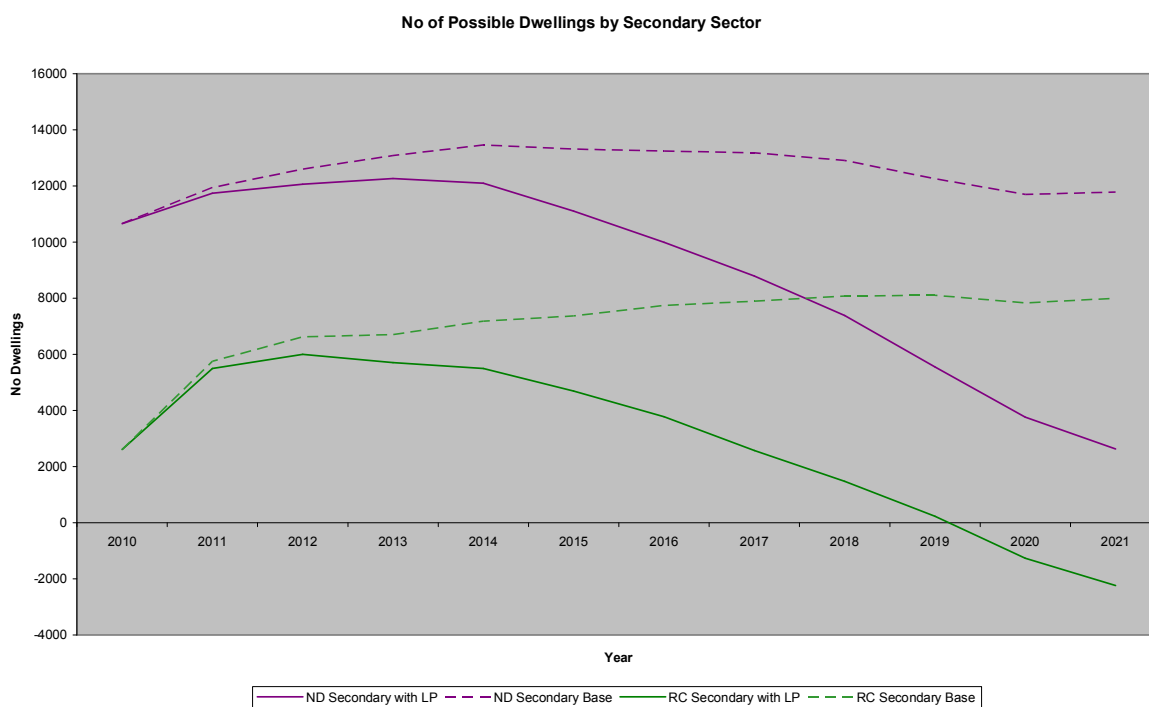
Historical House Completions



a) Number of Possible Dwellings by Primary Sector, Auditable and Local Plan

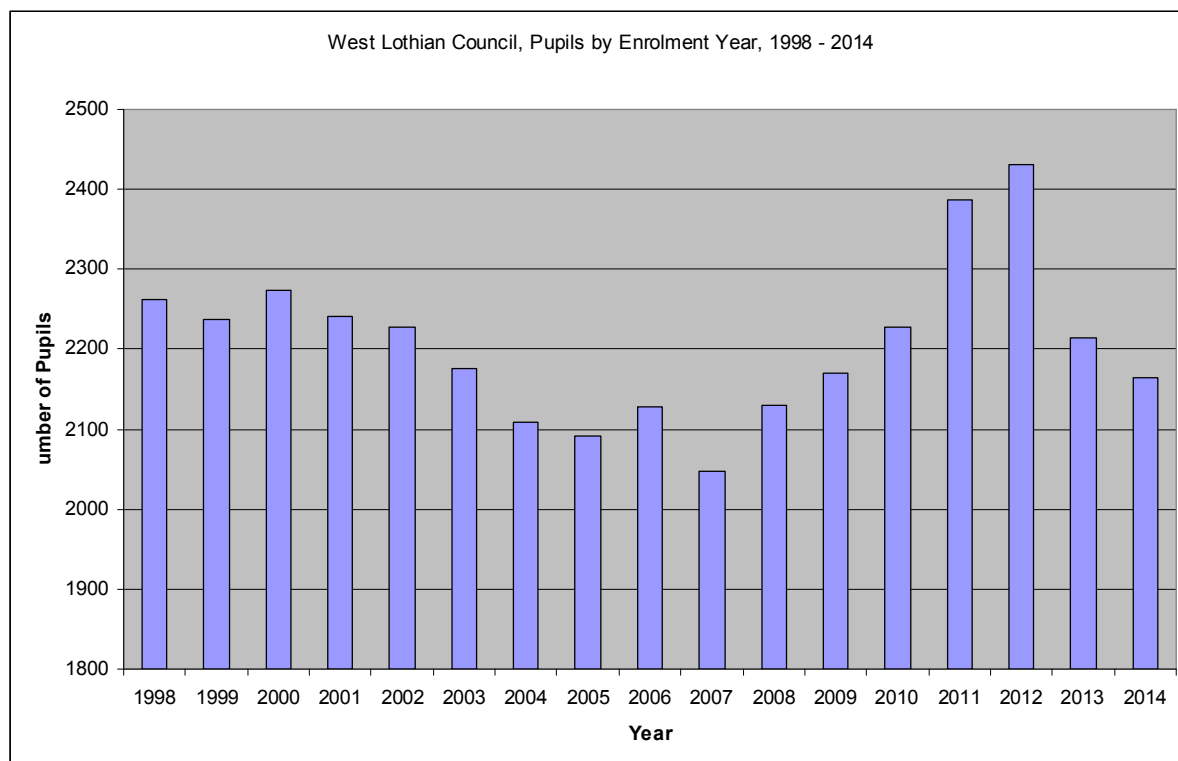


b) Number of Possible Dwellings by Secondary Sector, Auditable and Local Plan



West Lothian Council**0-18 Population Trend by Single School Enrolment Year Cohorts 1996 - 2013**

(As at 8 November 2010)

**Guidance Notes:**

Enrolment Year is from 1st March to 28/29 February of the following year, ie the data does not refer to calendar years. Enrolment year determines the School Session/Year in which children are entitled to commence school attendance at P1. The number of children is the current actual total of children who could have enrolled in that particular year. No allowance has been made in this raw data for primary school deferral.

Data for 2015 is incomplete and has not been used in the school forecast.

Data has been extracted from West Lothian Council's 0-18 Population and Household Database.