



Notice of a Meeting

**Performance & Corporate Services Overview &
Scrutiny Committee**

Monday, 17 January 2022 at 10.00 am

These proceedings are open to the public

Please note that this meeting will be **VIRTUAL**. Meetings will continue to be live-streamed and those who wish to view them are strongly encouraged to do so online to minimise the risk of Covid 19 infection.

If you wish to view proceedings, please click on this [LIVE LINK](#). However, that will not allow you to participate in the meeting.

Membership

Chair - Councillor Eddie Reeves

Deputy Chair - Councillor Michael O'Connor

<i>Councillors:</i>	Brad Baines	Andrew Gant	David Rouane
	Ian Corkin	Damian Haywood	
	Donna Ford	Ian Middleton	

Notes: *Date of next meeting: 11 March 2022*

For more information about this Committee please contact:

Chair

- Councillor Eddie Reeves

E-Mail: eddie.reeves@oxfordshire.gov.uk

Scrutiny Officer

- Khalid Ahmed, Tel: 07990 368048

E-Mail: khalid.ahmed@oxfordshire.gov.uk

A handwritten signature in black ink, appearing to read 'Rees'.

Yvonne Rees
Chief Executive

January 2022

What does this Committee review or scrutinise?

All corporate services and budget scrutiny, including customer services, property, assets, procurement, finance, corporate policy matters such as consultation and public engagement; takes a lead role in scrutiny of the budget and corporate plan.

How can I have my say?

We welcome the views of the community on any issues in relation to the responsibilities of this Committee. Members of the public may ask to speak on any item on the agenda or may suggest matters which they would like the Committee to look at. **Requests to speak must be submitted to the Committee Officer below no later than 9 am 4 working day before the date of the meeting.**

About the County Council

The Oxfordshire County Council is made up of 63 councillors who are democratically elected every four years. The Council provides a range of services to Oxfordshire's 678,000 residents.

These include:

schools	social & health care	libraries and museums
the fire service	roads	trading standards
land use	transport planning	waste management

Each year the Council manages £0.9 billion of public money in providing these services. Most decisions are taken by a Cabinet of 9 Councillors, which makes decisions about service priorities and spending. Some decisions will now be delegated to individual members of the Cabinet.

About Scrutiny

Scrutiny is about:

- Providing a challenge to the Cabinet
- Examining how well the Cabinet and the Authority are performing
- Influencing the Cabinet on decisions that affect local people
- Helping the Cabinet to develop Council policies
- Representing the community in Council decision making
- Promoting joined up working across the authority's work and with partners

Scrutiny is NOT about:

- Making day to day service decisions
- Investigating individual complaints.

What does this Committee do?

The Committee meets up to 4 times a year or more. It develops a work programme, which lists the issues it plans to investigate. These investigations can include whole committee investigations undertaken during the meeting, or reviews by a panel of members doing research and talking to lots of people outside of the meeting. Once an investigation is completed the Committee provides its advice to the Cabinet, the full Council or other scrutiny committees. Meetings are open to the public and all reports are available to the public unless exempt or confidential, when the items would be considered in closed session.

If you have any special requirements (such as a large print version of these papers or special access facilities) please contact the officer named on the front page, giving as much notice as possible before the meeting

A hearing loop is available at County Hall.

AGENDA

- 1. Apologies for Absence and Temporary Appointments**
- 2. Declaration of Interests - see guidance note on the back page**
- 3. Minutes (Pages 1 - 10)**

To approve the minutes of the meeting held on 10 December 2021 and to receive information arising from them.

- 4. Petitions and Public Address**
- 5. Budget and Business Planning 2022/23: Capital and investment strategies: Strategic plan - proposed priorities and objectives: Budget consultation findings (Pages 11 - 264)**

The Performance and Corporate Services Overview and Scrutiny Committee is invited to consider and comment on the following documents attached as annexes:

- Budget consultation 2022/23 findings (Section 2.1) and the draft strategic plan (Section 2.2) with accompanying engagement feedback on the Oxfordshire Fair Deal Alliance's priorities (Section 2.3)
- The Capital and Investment Strategy (Section 5.1), incorporating
 - i. The Treasury Management Strategy and Annual Investment Strategy 2022/23 (Section 5.2)
 - ii. The Investment Strategy for Property Investment 2022/23 (Section 5.3)
 - iii. The Property Strategy (Section 5.4)
- Proposed additions to the Capital Programme (Section 5.5)
- The Draft Capital Programme 2022/23 to 2031/32 (Section 5.6)

- 6. Consultation and Engagement Strategy 2022 - 2025 (Pages 265 - 284)**

The purpose of this report is to provide an overview of the draft consultation and engagement strategy 2022 - 2025, which will be considered at Cabinet on 15 February 2022.

The Committee is RECOMMENDED to

- a) consider the contents of the draft strategy and provide feedback to the Cabinet lead member for corporate services, the corporate director for customers organisational development and resources and supporting officers; and
- b) endorse the content of the strategy.

- 7. Budget Scrutiny Report (Pages 285 - 298)**

The purpose of this report is to provide the Performance & Corporate Services Overview and Scrutiny Committee with its DRAFT Budget Scrutiny Report following the consideration of the Cabinet Budget Proposals on the 10 December 2021.

The Committee is RECOMMENDED to

- (a) Consider the DRAFT Budget Scrutiny Report for submission to Council attached at Appendix A**
- (b) Agree a Budget Scrutiny Report for submission to Council at its budget setting meeting.**

Declarations of Interest

The duty to declare.....

Under the Localism Act 2011 it is a criminal offence to

- (a) fail to register a disclosable pecuniary interest within 28 days of election or co-option (or re-election or re-appointment), or
- (b) provide false or misleading information on registration, or
- (c) participate in discussion or voting in a meeting on a matter in which the member or co-opted member has a disclosable pecuniary interest.

Whose Interests must be included?

The Act provides that the interests which must be notified are those of a member or co-opted member of the authority, **or**

- those of a spouse or civil partner of the member or co-opted member;
- those of a person with whom the member or co-opted member is living as husband/wife
- those of a person with whom the member or co-opted member is living as if they were civil partners.

(in each case where the member or co-opted member is aware that the other person has the interest).

What if I remember that I have a Disclosable Pecuniary Interest during the Meeting?

The Code requires that, at a meeting, where a member or co-opted member has a disclosable interest (of which they are aware) in any matter being considered, they disclose that interest to the meeting. The Council will continue to include an appropriate item on agendas for all meetings, to facilitate this.

Although not explicitly required by the legislation or by the code, it is recommended that in the interests of transparency and for the benefit of all in attendance at the meeting (including members of the public) the nature as well as the existence of the interest is disclosed.

A member or co-opted member who has disclosed a pecuniary interest at a meeting must not participate (or participate further) in any discussion of the matter; and must not participate in any vote or further vote taken; and must withdraw from the room.

Members are asked to continue to pay regard to the following provisions in the code that *“You must serve only the public interest and must never improperly confer an advantage or disadvantage on any person including yourself”* or *“You must not place yourself in situations where your honesty and integrity may be questioned.....”*.

Please seek advice from the Monitoring Officer prior to the meeting should you have any doubt about your approach.

List of Disclosable Pecuniary Interests:

Employment (includes “any employment, office, trade, profession or vocation carried on for profit or gain.”), **Sponsorship, Contracts, Land, Licences, Corporate Tenancies, Securities.**

For a full list of Disclosable Pecuniary Interests and further Guidance on this matter please see the Guide to the New Code of Conduct and Register of Interests at Members’ conduct guidelines. <http://intranet.oxfordshire.gov.uk/wps/wcm/connect/occ/Insite/Elected+members/> or contact Glenn Watson on **07776 997946** or glenn.watson@oxfordshire.gov.uk for a hard copy of the document.

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Agenda Item 3

PERFORMANCE & CORPORATE SERVICES OVERVIEW & SCRUTINY COMMITTEE

MINUTES of the meeting held on Friday, 10 December 2021 commencing at 10.00 am and finishing at 1.20 pm

Present:

Voting Members:

Councillor Eddie Reeves – in the Chair

Councillor Michael O'Connor (Deputy Chair)

Councillor Brad Baines

Councillor Ian Corkin

Councillor Donna Ford

Councillor Andrew Gant

Councillor Damian Haywood

Councillor Ian Middleton

Councillor David Rouane

Cabinet Members in Attendance (Remotely):

Councillor Tim Bearder

Councillor Liz Brighouse OBE

Councillor Duncan Enright

Councillor Neil Fawcett

Councillor Jenny Hannaby

Councillor Liz Leffman

Councillor Mark Lygo

Councillor Calum Miller

Councillor Glynis Phillips

Councillor Dr Pete Sudbury

Other Members in Attendance (Remotely)

Councillor David Bartholomew

Councillor Kevin Bulmer

Councillor Ted Fenton

Councillor Arash Fatemian

Councillor Kieron Mallon

Councillor Jane Murphy

Councillor Liam Walker

Officers (Remotely):

Ansaf Azhar (Director of Public Health), Lorna Baxter (Director of Finance), Anita Bradley (Director of Law and Governance), Michael Carr (Law and Governance), Stephen Chandler (Corporate Director of Adult and Housing), Bill

Cotton (Corporate Director for Environment and Place), Steve Jorden (Corporate Director, Commercial Development Assets and Investment), Kerry Middleton (Head of Communications, Marketing and Engagement), Claire Taylor (Corporate Director of Customers and Organisational Development), Yvonne Rees (Chief Executive), Jodie Townsend (Law and Governance), Kathy Wilcox (Head of Financial Strategy), Susannah Wintersgill (Director of Strategy, Insight and Communications) and Khalid Ahmed (Law and Governance).

The Scrutiny Committee considered the matters, reports and recommendations contained or referred to in the agenda for the meeting and agreed as set out below. Copies of the agenda and reports are attached to the signed Minutes.

5/21 MINUTES

(Agenda No. 3)

The Minutes of the meeting held on 8 October 2021 were agreed as a correct record and signed by the Chair.

6/21 BUDGET PROPOSALS 2022/23 TO 2025/26 AND STRATEGIC PLAN

(Agenda No. 5)

The Committee was provided with a report which set out budget proposals for the period 2022/23 to 2025/26, which were included in the 2022/23 budget consultation. In addition, the Committee was provided annexes on:

- The Oxfordshire Fair Deal Alliance's priorities.
- Engagement feedback on the Oxfordshire Fair Deal Alliance's priorities
- Existing Planned Budget Pressures and Savings
- New Proposals for Investments, Pressures and Savings
- COVID-19 Pressures
- Overarching Equality Impact Assessment

The report provided the opportunity for the Committee to comment on these, alongside the financial context, and on the Oxfordshire Fair Deal Alliance's priorities in which these proposals were made.

The Leader of the Council introduced the budget proposals for 2022/23 to 2025/26 and informed Members that the proposals were all based around the Administration's nine priorities. The Performance and Corporate Services Overview and Scrutiny Committee was invited to consider and comment on the engagement feedback on

the Oxfordshire Fair Deal Alliance's priorities and how the budget proposals for 2022/23 – 2025/26 aligned with those priorities.

Members were reminded that comments on the proposals would be included in the Budget and Business Planning report which was submitted to Cabinet on 18 January 2022, along with the outcome of the public consultation. These would be taken into consideration by Cabinet in setting out their proposed revenue budget for 2022/23 and Medium-Term Financial Strategy (MTFS) to 2025/26.

Reference was made to a number of pieces of information yet to be received which would have an impact on the proposed budget which included the Local Government Finance Settlement, confirmation of council tax base and the collection fund position for each of the County's district council, confirmation of business rates income including and the collection fund position and the outcome of the public consultation.

The Cabinet Member for Finance gave the Committee an overview of the updated Medium Term Financial Strategy for the Council. Reference was made to the uncertainty caused by Covid and the pressures this has caused.

The main financial pressures were around adult social care, the implications of the Environment Bill, demand for high needs education. There were £12.7m of savings earmarked. Details of directorate proposals were provided in the presentation.

The Cabinet Member for Corporate Services provided the Committee with details of the five strands of the consultation process which was taking place on the budget. The public consultation on the 2022/23 budget proposals was launched on 2 December 2021 and would run until 5 January 2022.

Members were informed that throughout October and November 2021, the Council had undertaken public and stakeholder engagement to inform the development of the new strategic plan and the budget-setting process. There were five strands to this:

1. A residents' survey to understand residents' priorities and experiences
2. Public discussion groups
3. Young people's discussion groups to ensure that young people's voices are included
4. Stakeholder workshops and survey – with participation from the voluntary and community sector and town and parish councils
5. Councillor engagement – discussions at locality groups and follow-up survey to ensure the views of all county councillors were sought.

Members were informed there would be an in depth all Council briefing on the engagement work in January.

Points raised by the Committee

- The Committee noted that the Council does not currently have a Corporate Plan. Therefore, the Committee focused on the Oxfordshire Fair Deal Alliance's identified nine priorities to assess whether the budget proposals were appropriately allocated to resource delivery of the nine priorities. It had

been difficult to determine if appropriate resources had been allocated to each priority area as these had not been clearly defined.

- Members welcomed that details of deliverables and KPIs for each priority area would be developed.
- The priority areas were listed 1 to 9 which gives the impression that this was their order of importance. This was not the case, so this needed to be made clear in the Corporate Plan.
- Reference was made to Risk Stratification and whether budget proposals have taken account of the greatest risks to residents.
- Members recognised the pressures caused by Covid-19, however, it was not clear from the budget proposals how each Directorate budget allocation would enable the Council to achieve its objectives.
- The budget proposal does not set out details of how the new investment would contribute towards delivery of each priority with details of annual deliverables and targets.
- The proposed new investment does not correlate with the results of the public consultation exercise to date, for example: Children & Young People was number 1 priority in the consultation and yet level of new investment, placed this as 6th
- How would new investment address key public concerns of traffic congestion and improving roads and pavements?
- Young people had identified integrated transport and access to nature as top 2 priorities, yet this was not reflected in terms of additional investment.
- From the details on the updated Medium Term Financial Strategy and the proposed Council Tax increase contained in the report, it was not clear what residents would get as a result of the proposed Council Tax increase.
- Reference was made to the implications on the priorities of failed Council bidding for funding.
- With Climate Change at the heart of this Administration's work, the budget proposal (£690k) does not make clear how the budget proposals contribute towards combatting Climate Change. Reference was made to investments around supporting zero carbon infrastructure, development of pathways to zero carbon Oxfordshire, preparation for Environmental Bill and increasing capacity to deliver EV policy and others. However, there were no deliverables mentioned.
- Members noted the significant challenges which faced Adult Social Care and the implications this had on the budget, however, there was concern that more funding was required. A suggestion was made that to assist Cabinet for next year's budget setting process, a joint Working Group be set up between this Committee and People OSC to undertake a review of the pressures and challenges facing Adult Services in order to help Cabinet by identifying possible options and make recommendations.
- In relation to Children Services, the Committee noted that there were also budgetary challenges in this area and the proposals did not provide assurances that these challenges would be met. The Committee agreed that Cabinet should be asked how Scrutiny could support the Council on this issue.
- The accessibility of the budget needed to be better i.e. narrative was required to explain the various tables and graphs.

- Concern was expressed that the Family Solution Plus programme did not have the required level of investment due to the budgetary pressures of partners.
- Reference was made to an opportunity to invest to save in tackling health inequalities but providing additional funding to focus on Tier 1 tertiary prevention. A detailed action plan of how this could be delivered across all Council Departments would help shift Council focus into supporting health partners more effectively.
- The budget proposals were not clear for cultural services and libraries.
- Concern was expressed regarding the proportion of savings to re-investment, and it was asked that focus on this be given in future budget process.
- There were no details of the budgetary support in the future for the Scrutiny function in the budget proposal. Cabinet should consider what resources were required to deliver the best practice scrutiny function.
- There were some concerns regarding the Council's current approach to budget consultation and consultation in general.
- Workforce issues and retention and recruitment of staff was a concern for the Council and for significant public sector and business partners. Cabinet could consider the potential benefits of a County wide workforce commission to identify options moving forward.
- A clearer idea of how the revenue budget would support the delivery of the capital programme would be beneficial.
- There were questions asked relating to the reach of the consultation process and Members noted that the methodology and results of the process would be communication at the January briefing to all Members of the Council.

There were a number of observations and questions asked in relation to the engagement process in the budget process and responses were subsequently provided and are attached an appendix to these minutes.

The Committee considered and noted the Budget proposals for 2022/23, which included the Oxfordshire Fair Deal Alliance's priorities, the engagement feedback on the Oxfordshire Fair Deal Alliance's priorities, the revenue savings, pressures and investment proposals for 2022/23 to 2025/26 and combined impact on directorate budgets.

It was agreed that scrutiny officers would prepare a draft report on the Committee's comments and suggestions on the budget proposals, in consultation with the Chair and Vice-Chair of the Committee, for consideration at the next meeting of the Committee, prior to submission to Cabinet.

RESOLVED – (1) That Budget proposals for 2022/23, including the Oxfordshire Fair Deal Alliance's priorities, the engagement feedback on the Oxfordshire Fair Deal Alliance's priorities, the revenue savings, pressures and investment proposals for 2022/23 to 2025/26 and combined impact on directorate budgets, be noted.

(2) That a report on the Committee's consideration and findings on the budget proposals be brought before the next meeting of the Committee for agreement, prior to submission to Cabinet for consideration.

7/21 DEMOCRATIC PROCESSES - SCOPING REPORT AND APPOINTMENT TO A WORKING GROUP
(Agenda No. 6)

Consideration was given to a report which sought approval to establishment of a Working Group to undertake a deep dive review of Democratic Processes in line with an agreed scope to be agreed by this Committee.

RESOLVED – That a Scrutiny Working Group / Review Panel on the Council’s Democratic Processes be established, with the following membership:

**Councillor Brad Baines,
Councillor Donna Ford and
Councillor Michael O’Connor,**

And with the following terms of reference:

To review the key elements of support for democratic processes at Oxfordshire County Council, with particular regard to:

- (a) how the Council plans to best support elected members so that they can more effectively fulfil their roles**
- (b) how the Council plans to ensure those elected to represent the people of Oxfordshire are engaged in effective decision-making**
- (c) how the Council plans to make Overview and Scrutiny at the Council an example of best practice**
- (d) how the Council plans to support Overview and Scrutiny at the Council in better representing the voice and concerns of the public.**

..... in the Chair

Date of signing 200

Appendix

Minute No. 6/21

Question Responses: engagement

Please find below the responses to the questions made by the Performance and Corporate Services Overview and Scrutiny Committee 10 December on the five strands of engagement that has taken place to inform the budget and business planning process.

Question 1: Cllr Ford asked a question regarding health services in the residents' survey, and was context given e.g. does this mean doctors and/or public health.

To confirm that no specific definition was given, it simply stated health services. This question has its origins in the communities and local government place survey 2008 - 09 that all councils were required to undertake.

Question 2: Cllr Ian Middleton's raised queries on methodology for the residents' survey. He was keen to see how weighting had been applied and what population size this was applied to. He was unsure about the confidence level methodology and said he didn't recognise that. He also wanted to understand what population number had been used.

Extract from the residents' survey report prepared by Marketing Means.

Method

The resident survey was undertaken using a postal survey supported by an online survey. This survey was carried out in line with ISO9001 and ISO20252 quality standards.

Marketing Means used a Royal Mail Postcode Address File (PAF) of all residential addresses in the Oxfordshire County Council authority area to generate a random sample of households. The PAF file was stratified by local authority area and postcode and a randomly selected '1 in n sample' was taken to obtain an overall sample of **4,841** households.

The reason for stratifying the sample by local authority area and postcode in the first instance was to assist with achieving a geographically representative response to the survey.

Marketing Means sent out a paper questionnaire, along with a covering letter and a c5 pre-paid business reply envelope to all households in the sample. One reminder mailing (including a new copy of the survey) was sent to non-respondents during the fieldwork period. Marketing Means also provided a free phone helpline number facility for residents to use in case of any queries about the survey or requests for different formats.

Each survey carried a unique ID number for identification purposes, to ensure any subsequent reminder mailings were only sent to non-respondents. All residents in the sample were also provided with the alternative option of completing the survey online if they wished, using their unique login details which were included in the covering letter along with a link to the online survey.

The survey was initially sent to all the households in the sample during the week commencing **4 October 2021**. Those who had not responded were sent a full pack reminder during the week commencing **1 November 2021**. All valid responses received back by the revised closing date of **21 November 2021** were included in the analysis.

Marketing Means inputted all survey data electronically using Confirmit scanning software. Ten per cent of all responses were verified to check the accuracy of the data held. The analysis contained in this report was conducted using the SPSS statistical software package.

Confidence

A confidence level or interval is a measure of how reliable the results from the sample are in relation to the wider population and is widely used in social and market research. For example, In the Local Government Association's published guidance for the statutory Place Survey in 2010, a minimum requirement of achieving +/-3% confidence with the sample achieved from the survey was set to allow councils to benchmark against each other.

For this survey a target was set to achieve 1,065 completed surveys in order to meet the recommended confidence level overall of +/-3%.

Example: A confidence interval of +/- 3% at a 95% confidence interval, means that any proportion given has a 95% likelihood of being no more than 3% higher or lower in the wider population; e.g. if the satisfaction level with a particular service is 65% for the sample (i.e. all respondents), the true figure for the entire population will be between 62% and 68%, 95% of the time.

The calculation for this is:

Weighting data

In order to provide a representative view of the population of Oxfordshire as a whole the data achieved was weighted with consideration for the following factors: local authority area, age (18-44yrs, 45-64yrs and 65+yrs) and gender (using Office for National Statistics 2019 Mid-Year population estimates – 18+yrs population=545,544) to reduce any bias of over or under-represented groups in the achieved data.

Question 3: Cllr Michael O'Connor wanted a breakdown/explanation of urban versus rural for the young people selected and then specifically for the transport feedback.

Please note that the engagement with young people used qualitative methodologies and is not designed to be statistically representative.

- In the context of this engagement, urban has been defined as Banbury and Oxford.
- Market towns and growing towns encompassed children and young people living in Shiplake, Wantage, Littlemore, Chinnor, Dry Sandford, Henwood, Abingdon, Towersey, North Leigh, Carterton, Witney.
- Littlemore (the council's consultation and engagement team recognise that although Littlemore is a parish, it forms part of Oxford and not a rural market town or a growing town).

Overall, transport is discussed most by those from rural market towns or from growing towns, but it is still an important issue for those in cities.

Please find below a list of areas where transport was a high priority area.

Rural market towns / growing towns

- Abingdon
- Bicester
- Carterton
- Henley
- Littlemore (as identified above)

- Thame
- Wantage
- Witney

Oxford - Banbury

- Banbury
- Greater Leys
- Summertown

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Divisions Affected - All

PERFORMANCE AND CORPORATE SERVICES OVERVIEW AND SCRUTINY COMMITTEE

17 JANUARY 2022

Budget and Business Planning 2022/23

Capital and investment strategies

Strategic plan - proposed priorities and objectives

Budget consultation findings

Report by Director of Finance and Corporate Director Customers Organisational Development and Resources

RECOMMENDATION

1. The Performance and Corporate Services Overview and Scrutiny Committee is invited to consider and comment on the following documents attached as annexes:

- Budget consultation 2022/23 findings (Section 2.1) and the draft strategic plan (Section 2.2) with accompanying engagement feedback on the Oxfordshire Fair Deal Alliance's priorities (Section 2.3)
- The Capital and Investment Strategy (Section 5.1), incorporating
 - i. The Treasury Management Strategy and Annual Investment Strategy 2022/23 (Section 5.2)
 - ii. The Investment Strategy for Property Investment 2022/23 (Section 5.3)
 - iii. The Property Strategy (Section 5.4)
- Proposed additions to the Capital Programme (Section 5.5)
- The Draft Capital Programme 2022/23 to 2031/32 (Section 5.6)

Executive Summary

2. On 18 January 2022, as part of the Budget and Business Planning Report 2022/23, Cabinet will consider the proposed revenue budget for 2022/23, the Medium Term Financial Strategy to 2025/26 alongside the Capital and Investment Strategy, capital programme and supporting strategies.
3. On 10 December 2021, as part of the budget proposals 2022/23 to 2025/26 report, Performance and Corporate Services Overview and Scrutiny Committee considered the investments, pressures and proposed savings for the revenue budget included in the public consultation and the Oxfordshire Fair Deal Alliance's draft high level priorities. The committee is now invited to comment on the Capital and Investment Strategy, capital programme and supporting strategies.
4. The committee is also invited to comment on the budget consultation findings set out in Section 2.1 and the draft strategic plan, which includes objectives set out under nine strategic priorities in Section 2.2. These priorities were reviewed and amended following feedback from public and stakeholder engagement during the autumn. The committee can review this feedback in Section 2.3.
5. These comments will be taken into consideration by Cabinet in finalising its budget proposals which will be set out in the report to Cabinet on 18 January 2022 and to council on 8 February 2022.

Introduction

6. Performance and Corporate Services Overview and Scrutiny Committee is invited to comment on the Capital and Investment Strategy and supporting strategies included in this report. The Capital and Investment Strategy forms Section 5 of the suite of budget papers that comprise the Business and Budget Planning 2022/23 report considered by Cabinet on 18 January 2022 and Council on 8 February 2022. The budget consultation 2022/23 findings and the draft strategic plan are also presented for consideration – these will form Section 2 of the budget papers to be considered by Cabinet and Council.
7. The full suite of Business and Budget Planning papers to Council on 8 February 2022 will be comprised of the following sections:
 1. Leader of the Council's Overview
 2. Strategic Plan
 3. Chief Finance Officer's Statutory Report
 4. Revenue Budget Strategy
 5. Capital and Investment Strategy
8. The Budget and Business Planning Report 2022/23 to Cabinet on 18 January 2022 will comprise Sections 2, 4 and 5 and include the proposed revenue budget for 2022/23, the Medium Term Financial Strategy to 2025/26 alongside

the Capital and Investment Strategy, capital programme and supporting strategies. The annexes attached to this paper covers sections 2 and 5 from the list above. The revenue budget (section 4) was covered in the meeting of the Performance and Corporate Services Overview and Scrutiny Committee 10 December 2021.

Budget consultation

9. Between 2 December 2021 and 5 January 2022, the council invited comments on its budget proposals for 2022/23, including its proposed council tax increase. Residents and stakeholders were also signposted to a supporting consultation booklet for background information and to the published budget reports.
10. Feedback was primarily collated using an online survey on the council's digital consultation and engagement platform, Let's Talk Oxfordshire, with residents and stakeholders also being able to submit comments by email. A small number of paper copies of the consultation booklet and promotional posters were distributed to libraries and arrangements were put in place to supply information in alternative formats on request.
11. The budget consultation was actively promoted to a wide range of audiences using multiple channels (media, social media and other digital platforms, the website, advertising) and to staff and councillors to help them spread the word.
12. 1,390 online survey responses were received and a small number of written responses. The results are set out in Section 2.1.

Strategic plan

13. In July 2021, the council's Cabinet set out a set of nine strategic priorities and agreed a comprehensive programme of public and stakeholder engagement to refine and develop these priorities into a more detailed plan.
14. This programme of engagement took place in the autumn of 2021 and included a quantitative residents' survey and a series of qualitative discussion groups as set out below:
 - A residents' survey to understand residents' priorities and experiences.
 - Public discussion groups.
 - Young people's discussion groups to ensure that young people's voices are included.
 - Stakeholder workshops and survey – with participation from the voluntary and community sector and town and parish councils.
 - Councillor engagement and survey – discussions at locality groups and follow-up survey to ensure the views of all county councillors were sought.

15. Further feedback on the nine priorities, within the context of revenue budget proposals, has been sought, including from the public as part of the formal consultation on the budget proposals that took place during December 2021 and January 2022.
16. Section 2.1 sets out the budget consultation findings and Section 2.3 provides a summary of the results from the programme of engagement undertaken in the autumn to further develop the strategic plan.
17. The proposed strategic plan is set out in Section 2.2. The nine strategic priorities considered by Cabinet in July 2021 have been reviewed and refined following feedback. A suite of 41 underpinning objectives have been set out drawing on the programme of engagement and reflecting socio-economic, demographic and environmental challenges facing the county as outlined in documents such as the Joint Strategic Needs Assessment (JSNA).
18. The priorities, commitments and objectives in the strategic plan sit under a long-term vision 'to lead positive change by working in partnership to make Oxfordshire a greener, fairer and healthier county'. This vision has been further developed, following the autumn engagement programme, to recognise the role of collaboration and partnership working and the importance of health and wellbeing, in addition to addressing inequality and the climate emergency.
19. During the final quarter of the current year, a set of outcome measures and targets for each of the objectives will be developed and agreed to form the basis of the performance management framework for 2022/23. These will be presented to the Performance and Corporate Services Overview and Scrutiny Committee in March 2022 for consideration prior to adoption by Cabinet. These measures will thereafter be reported in the council's finance, performance and risk reports to track progress. The strategic plan will also be reviewed on an annual basis.

Capital and Investment Strategy

20. The Capital and Investment Strategy is an overarching strategy that brings together the strategies that drive the Capital Programme, the Investment Strategy and the Treasury Management Strategy. The strategy satisfies the requirements as set out Prudential Code for Capital Finance in Local Authorities 2017 and updated in 2021 for authorities to prepare at least one Investment Strategy containing the disclosures and reporting requirements specified in the guidance each financial year. The Strategy must be approved by full Council.
21. The overarching strategy is supported by the following strategies:
Strategies that determine the need for and prioritisation of investment through the capital programme:

- (a) Pupil Place Plan
- (b) Special Educational Needs and Disabilities (SEND) Sufficiency Plan
- (c) Oxfordshire Infrastructure Strategy (OxIS)
- (d) Highways Asset Management Plan
- (e) ICT Strategy
- (f) Property Strategy (Section 5.4)

Strategies that support the financing of the programme:

- (g) Treasury Management Strategy and Annual Investment Strategy (Section 5.2)
- (h) Investment Strategy for Property Investment (Section 5.3)

- 22. The Treasury Management Strategy and Investment Strategy for Property Investment are annual strategies and require approval by Cabinet (18 January 2022) and Council (8 February 2022). An asset condition survey of the council's properties will be carried out in the first quarter of 2022/23. The outcome of that exercise will be used to inform a full review of the Property Strategy later in the year. It will also identify the investment needed to bring the Council's key property assets up to the necessary standard, including enhancements to achieve carbon zero.
- 23. The Pupil Place Plan includes present and predicted future pupil numbers on roll, together with information about birth rates, school capacity, and new housing. The Plan sets out proposed changes in the number of school places available over the next year and it suggests where other changes may be necessary in the future. The updated Pupil Place Plan is attached as Annex 3 to the Capital & Investment Strategy.
- 24. The current Highways Asset Management Plan was agreed by Council in February 2020 and reviewed in January 2021. Locality engagement underpinning an update to the Plan will be undertaken in early 2022 and the expectation is that a revised plan will be agreed by Cabinet in July 2022.
- 25. The Council's 10 year Capital Programme is derived from the priorities identified in the supporting strategies and sets out the agreed capital investment to deliver those priorities. The programme is refreshed annually and agreed by Council each February. Section 5.5 sets out the proposed changes to the existing Capital Programme. The draft programme for 2021/22 to 2031/32 is attached at Section 5.6.
- 26. The following annexes are attached to this report:

- Section 2.1 Budget consultation 2022/23 report
- Section 2.2 Draft strategic plan
- Section 2.3 Engagement feedback on the Oxfordshire Fair Deal Alliance's priorities

Section 5.1 Capital and Investment Strategy

- Section 5.2 Treasury Management Strategy 2022/23
- Section 5.3 Investment Strategy for Property Investment 2022/23
- Section 5.4 Property Strategy
- Section 5.5 Proposed Changes to the Capital Programme
- Section 5.6 Draft Capital Programme 2021/22 to 2031/32

Risk Management

- 27. The Capital and Investment Strategy sets out that the capital programme includes contingencies for changes to scheme costs and further provision for inflationary pressure is proposed to be added to the programme for Major Infrastructure Schemes.
- 28. The Treasury Management Strategy and Investment Strategy for Property Investment set out the council's approach to risk around these investments.

Equality and Climate Implications

- 29. The Equality Act 2010 imposes a duty on local authorities that, when making decisions of a strategic nature, decision makers must exercise 'due regard to the need to eliminate unlawful discrimination... advance equality of opportunity... and foster good relations.'
- 30. There are no direct equality implications arising from the strategies attached to this report. Climate implications have been considered as part of the strategies underpinning the capital programme. Impact assessments relating to the revenue budget have been published as part of the consultation.

Financial Implications

- 31. The financial implications arising from the Capital and Investment Strategy are set out in the supporting annexes.

Lorna Baxter, Director of Finance
Lorna.Baxter@oxfordshire.gov.uk

Legal Implications

- 32. There are no direct legal implications arising from this report. The Council is required under the Localism Act 2011 to set a council tax requirement for the authority. This report provides information which, when taken together with the previous and future reports up to January 2022, will lead to the council tax requirement being agreed in February 2022, together with a budget for 2022/23, four-year medium term financial strategy and ten - year capital programme.

33. The Council has a fiduciary duty to council taxpayers, which means it must consider the prudent use of resources, including control of expenditure, financial prudence in the short and long term, the need to strike a fair balance between the interests of the council taxpayers and ratepayers and the community's interest in adequate and efficient services and the need to act in good faith in relation to compliance with statutory duties and exercising statutory powers.

Comments checked by:

Sukdave Ghuman, Head of Legal Services,
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LORNA BAXTER
Director of Finance

CLAIRE TAYLOR
Corporate Director Customers, Organisational Development and Resources

Annex:

Section 2.1 Budget consultation 2022/23 report
Section 2.2 Draft strategic plan
Section 2.3 Engagement feedback on the Oxfordshire Fair Deal Alliance's priorities

Section 5.1 Capital and Investment Strategy
Section 5.2 Treasury Management Strategy 2022/23
Section 5.3 Investment Strategy for Property Investment 2022/23
Section 5.4 Property Strategy
Section 5.5 Proposed Changes to the Capital Programme
Section 5.6 Draft Capital Programme 2021/22 to 2031/32

Background papers: Nil

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January 2022

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Leading positive change in Oxfordshire

The Oxfordshire Fair Deal Alliance's vision is to lead positive change by working in partnership to make Oxfordshire a greener, fairer and healthier county.

Strategic plan 2022 - 2025 (draft)

Our strategic priorities	Our commitments	Our objectives and areas of focus for 2022 /23
Put action to address the climate emergency at the heart of our work	<p>We will lead by example, setting ambitious targets to reduce our own carbon emissions and aligning our carbon net zero commitments to the the principles of the Climate and Ecology Bill. Our environmental and planning ambitions will prioritise climate action and community resilience.</p>	<p>Work with partners to implement the county's 'Pathways to Zero Carbon' route map, a comprehensive plan for decarbonising Oxfordshire.</p>
		<p>Work to bring our own buildings, operations, and supply chains to net zero by 2030, and support the retrofit of residential homes to improve energy efficiency.</p>
		<p>Accelerate work on supporting biodiversity and nature recovery while adapting to and considering the impacts of climate change, including extreme weather and supply chain disruption.</p>
		<p>Support community and business activity to cut carbon emissions and accelerate a shift to a resilient and locally focused zero carbon economy.</p>
		<p>Support and promote a shift towards active travel (walking, cycling and use of public transport), reducing the need for private cars and accelerate the transition to electric vehicles (EVs) by expanding charging capacity across the county.</p>
		<p>Accelerate and sustain the benefits of Project Local Energy Oxfordshire (LEO) which is running trials to build a greener, more resilient, fairer renewable energy network.</p>
		<p>Accelerate our LED street lighting replacement programme and further reduce the energy, visual and environmental impacts of street lighting.</p>

Section 2.2

Our strategic priorities	Our commitments	Our objectives and areas of focus for 2022 /23
Tackle inequalities in Oxfordshire	<p>We will work with our partners and local communities to address health, social and educational inequalities focusing on those in greatest need. We will seek practical solutions for those most adversely affected by the pandemic. We will support digital inclusion initiatives that give our residents the skills, connectivity and accessibility to our services and provide alternative options for those who cannot access our services digitally.</p>	<p>Work with partners to develop practical plans to address the drivers and impact of disadvantage, for example food poverty, housing and deprivation, drawing on the lessons learned from our response to COVID-19.</p>
		<p>Use research, best practice and local insight to work with communities and target support to the areas of greatest need, with a focus on healthy place shaping, preventative actions and early intervention projects.</p>
		<p>Working with partners, develop and implement a digital inclusion strategy for Oxfordshire, including exploring how assistive technology can support vulnerable groups to access services and lead a better quality of life.</p>
		<p>Work with partners to ensure that those in our most vulnerable and disadvantaged communities can access support through appropriate local outreach services and signposting to other sources of help, ensuring that lack of access to technology is not a barrier.</p>

Our strategic priorities	Our commitments	Our objectives and areas of focus for 2022 /23
Prioritise the health and wellbeing of residents	<p>We will work with the health and wellbeing board and our partners to deliver and support services that make a vital contribution to our residents' physical and mental wellbeing. We will support the wellbeing of those in our communities who have been affected, physically and mentally, by COVID-19 and will continue to support our volunteers and the voluntary sector.</p>	<p>Work with health partners to implement the health and wellbeing strategy and prioritise health promotion and preventative initiatives. This includes health checks and screening, implementing the plan to make Oxfordshire smoke free by 2025 and delivering the priorities in the 2022 Oxfordshire domestic abuse strategy.</p>
		<p>Maximise access to the opportunities provided by libraries, museums, sport and leisure settings, nature and green spaces and other services to support the health and wellbeing of residents.</p>
		<p>Work with partners to publish a pandemic recovery and renewal framework that will help us all continue to support local communities and ensure voluntary sector resilience, using the learning from our collective COVID-19 response.</p>

Section 2.2

		Develop an enhanced long-term support offer for our voluntary and community sector partners.
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Our strategic priorities	Our commitments	Our objectives and areas of focus for 2022 /23
Support carers and the social care system	We will engage nationally to push for a fair deal for the funding of social care. Locally, we will support carers, including young carers, and help those who want to live independently. We will work with communities, in collaboration with the health and social care system and voluntary sector to explore new ways to provide services. We will and focus on preventative services, helping people to stay active and supported at all stages of their lives.	Continue to deliver seamless services for people who need them – improving quality, flexibility and value – and work with service users and providers to find new ways to promote self-directed support, increasing choice and control.
		Support residents to live independently and well at home by promoting physical activity and healthy choices; building social connections and tackling isolation; and supporting people to make positive contributions in their communities through volunteering and social action outside of traditional social care services.
		Invest creatively in a range of options to support carers maintain their caring roles – such as respite, mutual support and access to advice and information and intergenerational schemes to build strong, resilient, and welcoming communities.
		Build skills and access to training for volunteers and our social care workforce, to ensure we achieve high standards, support safeguarding and foster innovation.

Our strategic priorities	Our commitments	Our objectives and areas of focus for 2022 /23
Invest in an inclusive, integrated and sustainable transport network	We will create a transport network that makes active travel the first choice for short journeys and invest in public transport to significantly reduce our reliance on car journeys. In areas of planned housing growth, we will prioritise	Prioritise active travel and public transport interventions on the existing highway network to support healthy lifestyles and address inequalities in travel connectivity.
		Develop, publish and deliver our local transport and connectivity plan.
		Deliver our commitments within the bus service improvement plan.
		Develop and implement a plan for improved strategic routes for freight, including exploring rail, and reducing large vehicle movements on non-strategic roads.

Section 2.2

	active and public transport over road capacity for cars.	Implement a new countywide approach and programme for 20mph zones.
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Our strategic priorities	Our commitments	Our objectives and areas of focus for 2022 /23
Preserve and improve access to nature and green spaces	We will work with partners to provide safe and clean green spaces across the county that support the physical and mental wellbeing of our residents. We will take action to protect and increase biodiversity, supporting nature recovery, in both rural and urban environments.	Support and enable the activities from Oxfordshire's community action groups to improve local environments and make nature more accessible.
		Develop a countywide nature recovery strategy, and a tree and woodland plan, including taking part in the Queen's Green Canopy programme, and support the development of a new local nature partnership for Oxfordshire.
		Improve the amount and distribution of accessible and safe natural green space within Oxfordshire.
		Ensure our public rights of way network is effectively maintained.

Our strategic priorities	Our commitments	Our objectives and areas of focus for 2022 /23
Create opportunities for children and young people to reach their full potential	We will support all our children and young people, and their families, to achieve their very best and to prepare them for their future, including safeguarding, and supporting those more vulnerable and with additional needs. We will continue to work with partners to provide help early so children and families are less likely to be in need.	Work with partners to implement a new emotional and mental wellbeing strategy for children and young people.
		Develop our youth offer and continue to invest in holiday activity programmes with a focus on the highest areas of deprivation.
		Develop local placement capacity for children in need and in care.
		Improve the timeliness of education, health and care plans for children with special educational needs and disabilities.
		Narrow the educational attainment gap for children across Oxfordshire helping them to achieve their potential.

Our strategic priorities	Our commitments	Our objectives and areas of focus for 2022 /23
Play our part in a vibrant and participatory local democracy	<p>We are committed to taking decisions in an open and inclusive way. We will engage and listen to Oxfordshire residents. We will be open to scrutiny and regularly provide progress updates. We will put the impact on the climate and future generations at the heart of decision making. We will manage our own resources carefully.</p>	Develop and implement a new consultation and engagement strategy, enhancing opportunities for residents, including young people and those seldom heard, to have their say in service development.
		Increase opportunities for the public to participate in and contribute to council meetings and decision making, including the use of technology to support this.
		Improve our approach to equality impact assessments, ensuring that we set out the effects of our decisions on the climate and future generations.
		Support an enhanced role for overview and scrutiny to contribute to open and transparent decision making.

Our strategic priorities	Our commitments	Our objectives and areas of focus for 2022 /23
Work with local businesses and partners for environmental, economic and social benefit	<p>We will help Oxfordshire become a recognised centre of innovation in green and sustainable technologies. We will use our purchasing power for environmental, social and economic benefit and ensure that our pandemic recovery planning supports sustainable job creation.</p>	Work with partners, including the Oxfordshire Local Enterprise Partnership (OxLEP), to help local businesses recover from the pandemic by enabling long-term job creation through apprenticeships and business support.
		Promote career pathways in health and social care for local people and encourage those who are looking to change their careers to start their own enterprises in the sector.
		Encourage suppliers to commit to providing additional social and environmental value, as part of our procurement and development planning processes, which will benefit local communities.

Section 2.2

		Facilitate collaboration between businesses, the universities, OxLEP and our health and local authority partners to maintain Oxfordshire as a centre of innovation, turning ideas into real-life solutions in areas including transport, climate, energy and healthcare.
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Section 2.3

Engagement feedback on the Oxfordshire Fair Deal Alliance's priorities

Introduction

1. Throughout October and continuing into November 2021, we have undertaken public and stakeholder engagement to support the development of the council's new strategic plan and the 2022/23 budget setting process.
2. This had five strands:
 - A residents' survey to understand residents' priorities and experiences.
 - Public discussion groups.
 - Young people's discussion groups to ensure that young people's voices are included.
 - Stakeholder workshops and survey – with participation from the voluntary and community sector and town and parish councils.
 - Councillor engagement and survey – discussions at locality groups and follow-up survey to ensure the views of all county councillors were sought.

Methodology summary and what we did

3. The following table describes the methodology used and responses received.

Engagement strand	Methodology	Responses
Strand 1: Residents' survey 4 October - 21 November 2021 Conducted by independent agency, Marketing Means	Postal survey sent to 4,841 households, stratified by district and postcode. Sent to a random sample of 4,841 households, stratified by districts and postcode. Representative of the adult population of Oxfordshire to +/- 3% @95% level of confidence. Option to respond by post or online.	<ul style="list-style-type: none">• 1,091 responses received.• Mix of post and online, giving a response rate of 23%.• Final data has been weighted by local authority area, age and gender against the ONS 2019 mid-year estimates to reflect Oxfordshire's population as a whole.
Strand 2: Public discussion groups 12 October - 10 November 2021	Eight, online (Zoom) group discussions with adults 18+, six main ones and two top-up groups.	<ul style="list-style-type: none">• Engaged 35 people.

Qualitative research conducted by independent agency Ask for Research.	Participants were recruited to reflect different geographies (urban, market town and rural) and life stages (young adults who are pre-children, families, empty nesters).	
Strand 3: Young people's discussion groups Conducted by independent agency, Families, Kids and Youth. 18 October - 27 October 2021	Five online group discussions with children and young people aged between 11 and 17, plus feedback from one person who could not join a group. The groups were filmed (with some GDPR restrictions on use/sharing). Most participants were recruited to reflect different geographies (urban, market town, growing towns, and surrounding villages), except for one group that was made up solely of members of the council's Children in Care Council.	<ul style="list-style-type: none"> Engaged 29 people.
Strand 4: Stakeholder workshops and survey Conducted by the council led by the consultation and engagement team. Meetings: w/c 18 October 2021 Survey hosted on Let's Talk Oxfordshire: 22 October - 7 November 2021.	Three workshops, two for town and parish councils and one for representatives of the voluntary, community and education sector. Led by Cabinet members and supported by officers. Stakeholders were given the opportunity to listen to a presentation on the priorities and strategic plan process and provide feedback. Participants were sent a follow-up online survey.	<ul style="list-style-type: none"> 108 representatives from local councils accepted invitation, and 99 attended (some councils sent multiple attendees). 66 representatives from the voluntary, community and education sector stakeholders accepted the invitation and 57 attended (some groups/organisations sent multiple attendees). 29 responded to the online survey.
Strand 5: County councillor engagement and survey Conducted by the council led by the consultation and engagement team and strategy and policy team. Meetings: 4 October - 26 October 2021 Survey hosted on Let's Talk Oxfordshire: 8 October - 7 November 2021.	Presentation and discussion on the agenda at 8 of the 9 councillor locality groups (the Thame locality group discussion did not go ahead due to IT issues). Councillors given the opportunity to listen to a presentation on the priorities and strategic plan process and provide feedback. All clrs sent the survey.	<ul style="list-style-type: none"> All councillors given the opportunity to feedback. 11 councillors responded to the online survey.

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Feedback

4. The five strands of engagement have generated a wealth of feedback and we are just starting to scratch the surface of what we have been told. All the strategic priorities are of interest, but relative importance depends on the audience groups.

Strand 1: Residents' survey

5. The residents' survey has a much wider insight focus than solely the priorities. The wider findings will be shared with officers and councillors.
6. From the residents' survey, our only representative piece of research, a clear hierarchy of priorities emerged when residents were asked 'which two priorities do you think it is most important for the council to concentrate on'. Table 1 shows how prioritising the health and wellbeing of residents and putting action to address the climate emergency at the heart of our work were deemed most important. Table 2 shows the importance residents placed on the factors listed in making somewhere a good place to live compared to what they felt most needs improving.

Table 1

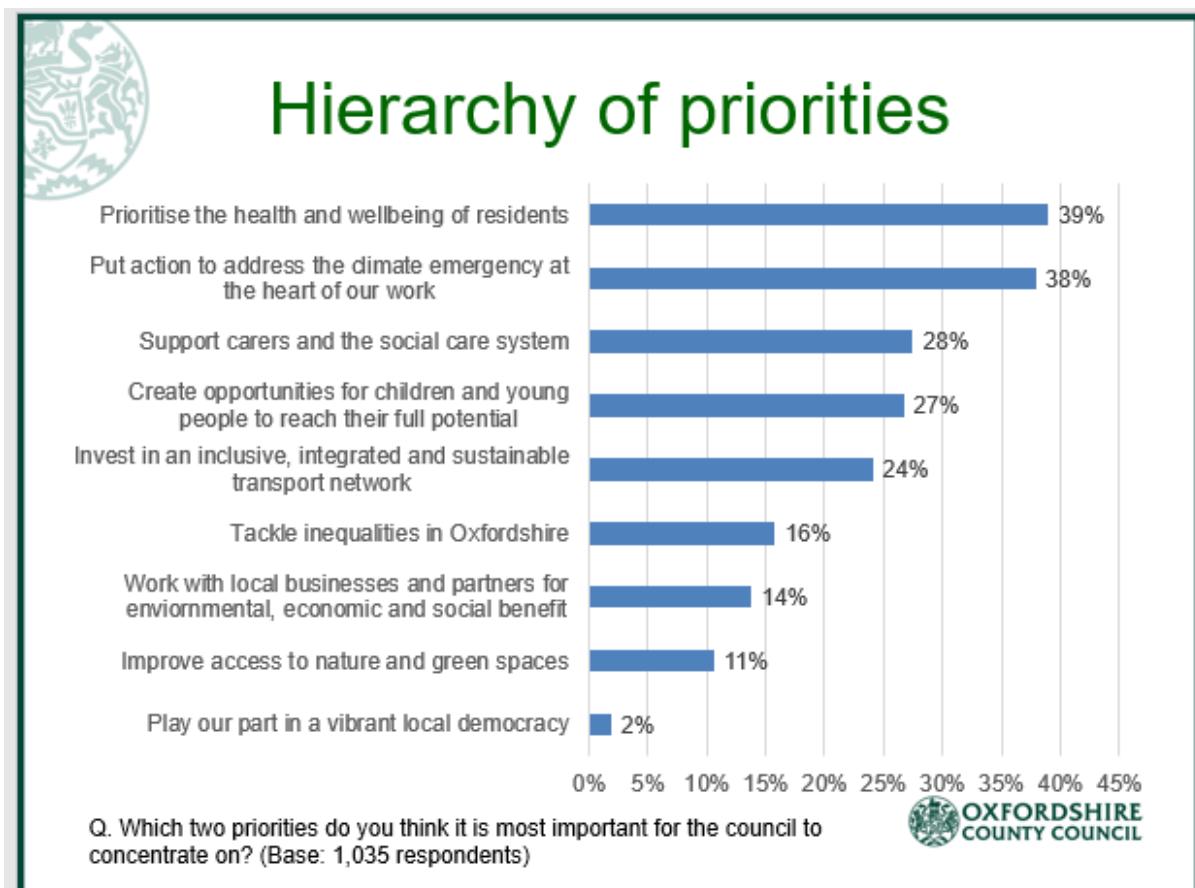
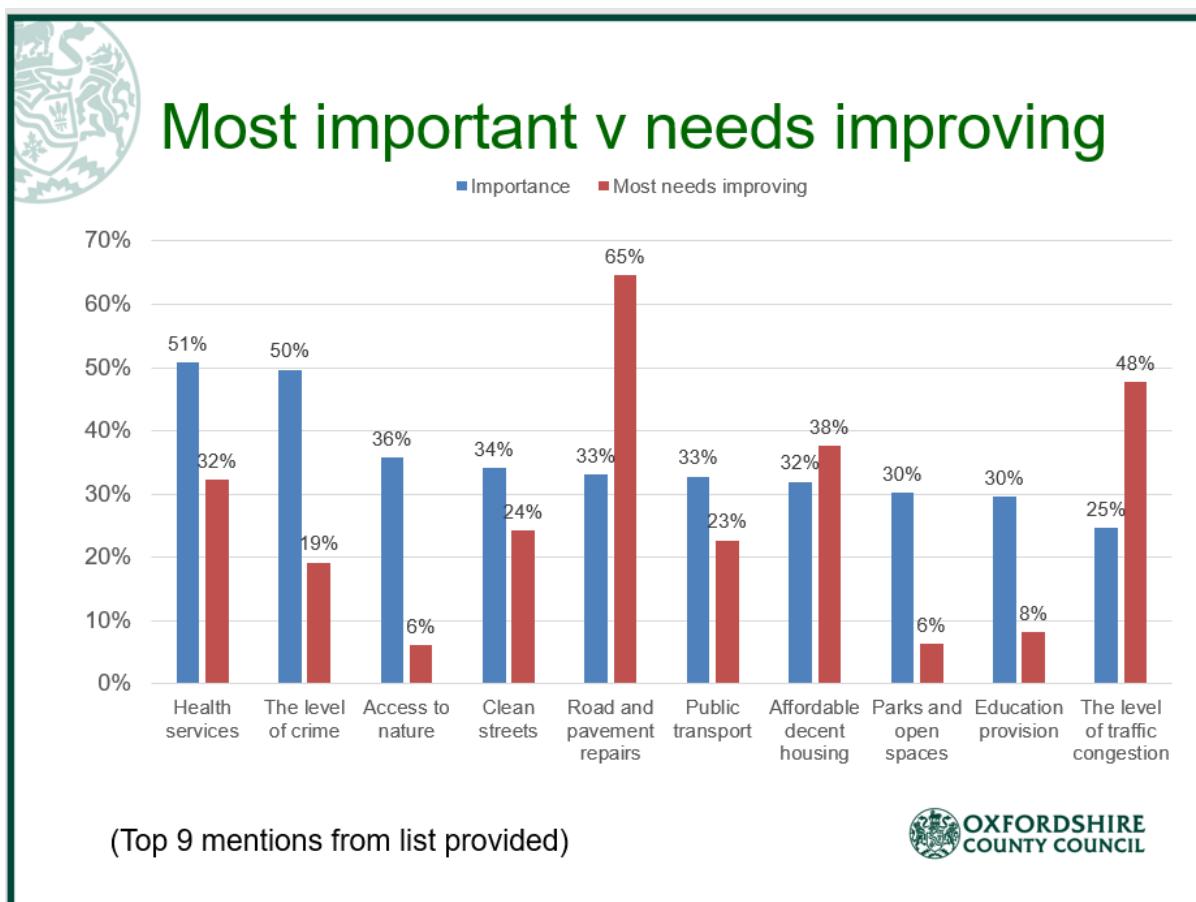


Table 2



Strand 2: Public discussion groups

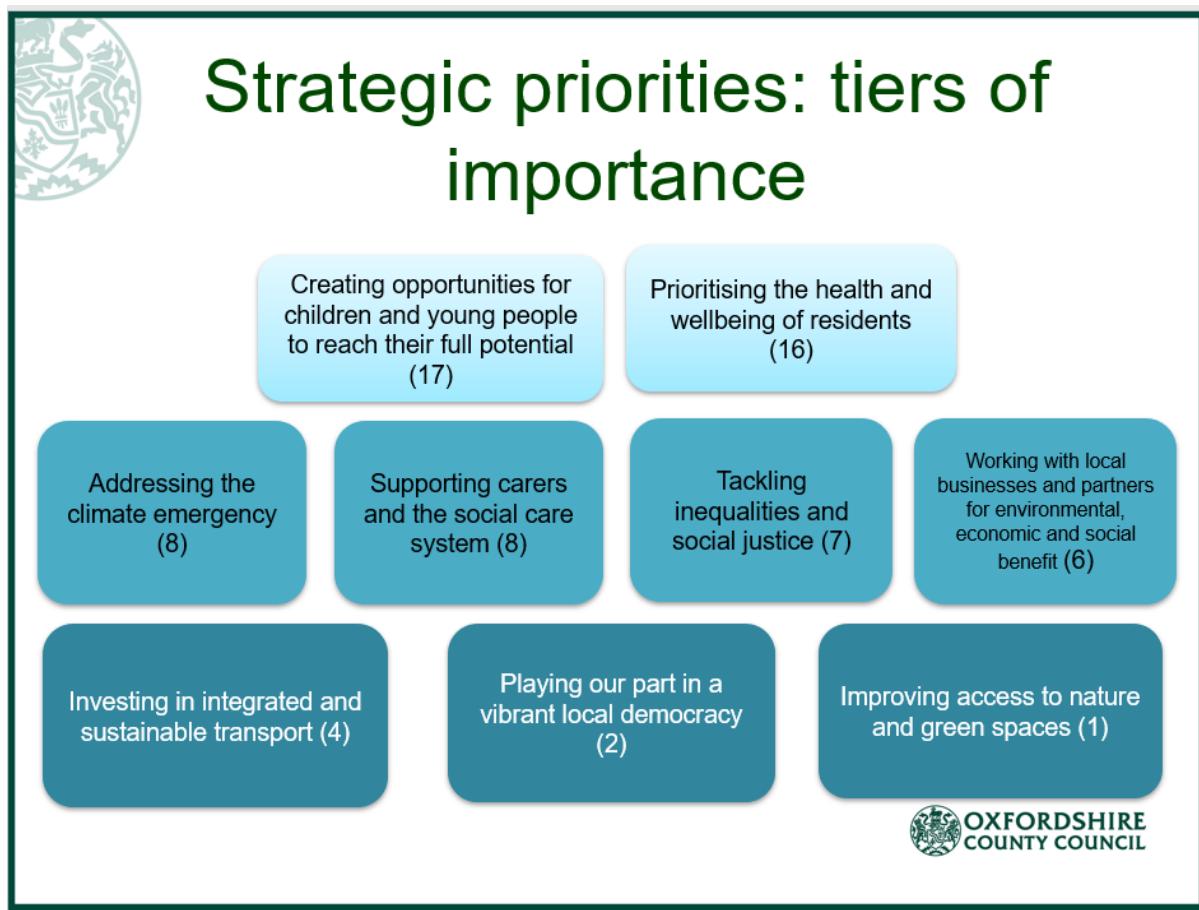
Overall

7. Residents were asked to rate the two priorities that they personally considered to be of most importance for the council to concentrate on as shown in table 3 below.
8. All nine priorities are seen as **important**, but there is a clear division between the priorities that affect individuals and those that affect the wider county. Residents focus in the first instance on what is of importance and relevance directly to themselves and the people they care about.
9. The clear top two strategic priorities:
 - a. prioritising the health and wellbeing of residents
 - b. creating opportunities for children and young people to reach their full potential.
10. Residents recognised the interlinking of the priorities and if this could be better represented visually. They considered the scope of the nine priorities is huge, and the wording and intention positive, but they want this to be supported by realistic intent and detail.

11. Actions to support the nine priorities need to be relevant, support the future, build on strengths, achievable and their impacts need to be measurable. The wording of the actions itself needs to be accessible and inclusive.

12. Residents understand the council doesn't have endless resources and want the council to focus on what can be achieved, rather than wide-ranging promises.

Table 3



Health

13. Health and wellbeing affect everyone, the outcomes of which everyone relies on. Important areas of health to focus on are physical health, mental health, healthy living, and accessibility for all.

14. The impact of the pandemic on the provision of health services was noted. Actions taken by volunteers to support health and wellbeing within the county could be supported by the council.

15. **Mental health:** While improvement in the openness regarding mental health is noted, this needs to be developed and built on. Support needs to be accessible and timely, with demand being exacerbated by the pandemic. Local support, amenities and programmes should be provided.

16. Physical health: We need to ensure equality of access for residents of all ages, physical abilities and income to sports and team sports. A specific focus on encouraging girls at a young age to participate was raised, as well as the need to encourage (not enforce) healthy eating when providing information, and access to support.

Children and young people

17. Children and young people are seen as the future for the county. Creating opportunities for them to reach their full potential is crucial to achieving the vision for the county. Education is a significant contributor and the negative impacts of COVID-19 on schooling has resulted in both the loss of schooling and opportunities as well as its impacts on mental and physical health and social wellbeing.

18. Opportunities for older children need to ensure the demand for vocational options are supported, specifically with the availability of relevant apprenticeships, and there is equality of opportunity for all young people.

19. Out of school activities for both children and young people were crucial; these need to be inclusive, accessible and affordable.

20. Inclusion is required from an early age:

- a. for education at all ages
- b. equality of access to acceptable living standards; and
- c. equality of opportunity for young people from all backgrounds.

21. Equality of access within the school system is needed:

- a. For older children, equality of access to opportunities was raised in the form of both academic and non-academic routes.
- b. The provision of sufficient and relevant apprenticeships and entrepreneurial experience for young people wanting to take a vocational option was raised.

22. Accessible (free) outside of school provision to support all young people:

- a. Sports facilities, youth clubs and places for older young people to spend time.
- b. The closure of out of school facilities, such as youth clubs, was a focus of discussion throughout all ages of the discussion groups.

23. Mental health support within and outside of schools is key:

- a. Promoted, accessible and timely – an increased need following COVID.

Strand 3: Young people's discussion groups

24. The top strategic priorities among young people were:

- a. investing in integrated and sustainable transport
- b. improving access to nature and green spaces

- c. prioritising the health and wellbeing of residents.

25. Independent research company Families, Kids and Youth, tiered the importance of the priorities as shown in table 4 below.

Table 4



26. Transport:

- a. Young people are keen to resolve issues related to bus/train timetables, expensive fares (young person's concession card?), and safer cycles routes.
- b. Creating additional transport links with popular destinations (eg retail parks) is also welcomed. Let's hear from our young people.

27. Green spaces:

- a. Preservation of green spaces was key, new housing developments were cited negatively as a threat to this.
- b. There are few places young people feel they can go to socialise. Being able to visit and socialise in green spaces became a priority during lockdown. Current options are limited and adjusting opening hours in areas such as the local parks is suggested.
- c. Ensuring green spaces are well maintained is a concern – there were requests for more bins in public areas and restrict removing natural areas such as wildflowers.

28. Health and wellbeing:

- a. Young people are highly passionate about wellbeing.
- b. There is concern that wait times for mental health support are too long and care for under 16s is insufficient.
- c. Other plans suggested by the council (eg 'Smoke-free by 2050'; measures to support local businesses) are supported but more details are needed, current proposals sound too vague.

29. Communication is key:

- a. use clearer, simpler language
- b. hear direct from the council through school visits and posters
- c. use social media that is used by their age group eg Tik Tok not Facebook.

Strand 4: Stakeholder workshops

30. In the group discussions there were short but quality conversations on all nine priorities with practical suggestions.

31. Although not representative, the top three priorities from the survey were:

- a. Put action to address the climate emergency at the heart of our work (15 mentions)
- b. Invest in an inclusive, integrated and sustainable transport network (12 mentions)
- c. Prioritise the health and wellbeing of residents (9 mentions).

32. As per the public discussion groups, stakeholders were quick to identify how the priorities link. For example: "The inequalities for rural dwellers should not be overlooked, this links to the transport priority," and "If an individual's health and wellbeing is poor it hinders their ability to engage on other priorities."

33. The workshops were well received with good engagement on the priorities and there was clear interest in targeted sessions in the future.

34. Several stakeholders openly welcomed the priorities but participants were keen to understand what sits behind the priorities as presented.

35. Rural transport and housing development linked to targets, infrastructure provision, decarbonisation and conflict with preservation of green spaces were the key themes for questions from town and parish councils.

36. The council's commissioning process (collaborative and participatory commissioning) and actively engaging groups and communities was of specific interest to the voluntary and community sector.

Strand 5: Councillor feedback

37. The three priorities that stand out from the councillors' survey (not representative) when asked to consider of the needs of their division are:
 - a. Putting climate action at the heart of our work (urgency in action)
 - b. Invest in an inclusive, integrated and sustainable transport network
 - c. Create opportunities for children and young people to reach their full potential.
38. In their locality groups and through the survey, councillors provided constructive challenge and put forward practical ideas for taking each of the individual priorities forward.
39. For example, for playing our part in a vibrant local democracy the following ideas emerged:
 - a. Need to be more proactive approach in engaging electorate, particularly the younger voters and school children
 - b. Citizen assemblies could be part of this
 - c. Consultations could be broader and not so objector focused.

Overall messages

40. All the strategic priorities are of interest, but relative importance differs by audience group.
41. Health/wellbeing is an emerging overall top three priority across all strands of feedback.
42. Investing in an inclusive, integrated, and sustainable transport network is the standout priority from the young people's discussion groups and health and wellbeing and children and young people from the public discussion groups. For the stakeholder groups, climate, transport and health and wellbeing were key themes, while for county councillors, key themes were climate, transport and children and young people.
43. It is proposed that positive consideration is given to integrating health into the overall vision statement and 'preserve' into priority six.
44. Language is key, we need our priorities and actions to achieve them to be clear (not ambiguous), accessible and inclusive both in aim and wording to engage audiences.
45. There is some appetite for ongoing engagement and working in partnership with partners and communities to deliver the priorities.
46. Deep dive sessions on the feedback are being planned to maximise its value, incorporate into the development of the strategic plan and subsequent service plans.

Next steps

47. Insight from all five engagement strands has already been used to feed into the budget and business planning process. The county council's budget consultation, launched on 2 December 2021 and closed on 5 January 2022, and included questions on the Oxfordshire Fair Deal Alliance's priorities.
48. The outcomes of this budget consultation will be considered by the council's Cabinet on 18 January 2022 and decided by the council on 8 February 2022. Consultation feedback will also help develop a new strategic plan for the council.
49. Deep dive sessions where the insight gathered from this feedback can be explored in more detail are being planned for January and beyond to inform new and existing pieces of work, service plans and key strategy documents.

Kerry Middleton

Head of Communications, Marketing and Engagement

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Capital and Investment Strategy - 2022/23 to 2031/32

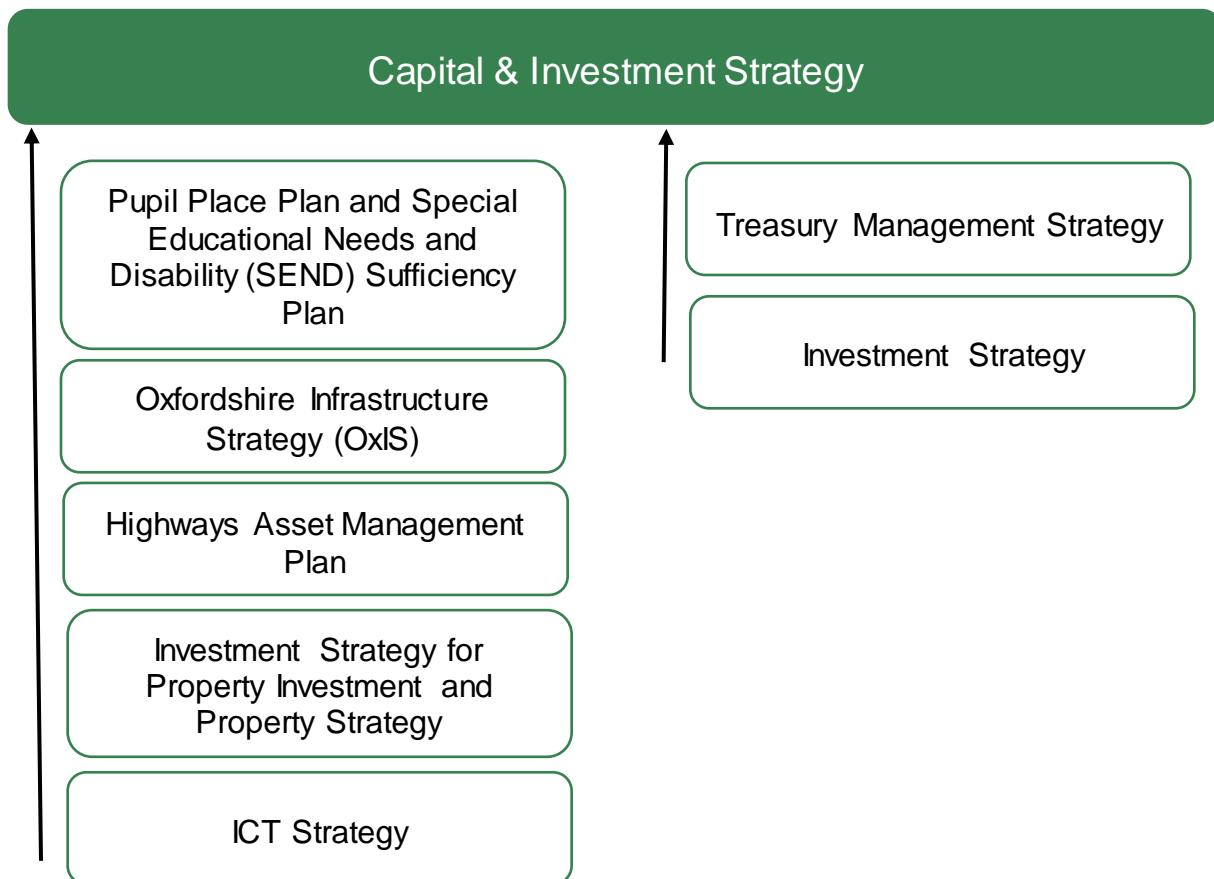
Purpose and Objectives

1. The Prudential Code for Capital Finance in Local Authorities 2021 requires that for each financial year, a local authority should prepare at least one Investment Strategy containing the disclosures and reporting requirements specified in the guidance. The Strategy must be approved by full Council.
2. The definition of an investment covers all the financial assets of a local authority as well as other non-financial assets that the organisation holds primarily or partially to generate a profit; for example, investment property portfolios.
3. The objectives of the Prudential Code are to ensure that the capital expenditure plans of local authorities are affordable, prudent and sustainable and that treasury management decisions are taken in accordance with good professional practice and in full understanding of the risks involved.
4. The Prudential Code requires authorities to look at capital plans, investments, and debt in the light of overall organisational strategy and resources and ensure that decisions are made with sufficient regard to the long-term financing implications and potential risks to the authority.
5. The Prudential Code sets out that in order to demonstrate that the authority takes capital expenditure, investment and borrowing decisions in line with service objectives and properly takes account of stewardship, value for money, prudence, sustainability and affordability, authorities should have in place a capital strategy. The capital strategy should set out the long-term context in which capital expenditure and investment decisions are made and gives due consideration to both risk and reward and impact on the achievement of priority outcomes.
6. This Capital and Investment strategy sets out the requirements of the Prudential Code covering all the investments of the authority and covers the following areas:
 - Approach to capital investment
 - Capital financing principles
 - Capital programme approach and overview of existing Capital Programme
 - Capital investment proposals for 2022/23 – 2031/32
 - Capital governance and decision-making
 - Minimum Revenue Provision Policy Statement for 2022/23 (Annex 1)

- Prudential Indicators for Capital Finance (Annex 2)
- Pupil Place Plan (Annex 3)

Introduction

7. The Capital and Investment Strategy is a policy document that outlines Oxfordshire County Council's approach to investments over the medium term. It is closely linked to other key strategic and policy documents, such as:
 - Strategic Plan
 - The Oxfordshire Infrastructure Strategy (OxIS)
 - Oxfordshire Joint Statutory Spatial Plan
 - Highways Asset Management Plan
 - Oxfordshire Local Industrial Strategy
 - The Financial Strategy including the Medium Term Financial Strategy
8. This strategy reflects the ambition for the Capital Programme where the schemes contained in the programme will all be defined from council strategies that determine the management of its assets, services and needs.
9. This diagram shows relationship between the Capital and Investment Strategy and supporting plans and strategies with the various service plans and strategies as well as the Treasury Management & Investment Strategy all feeding into to the overarching Capital & Investment Strategy:



Section 5.1

10. The Capital and Investment Strategy complements the key documents above by defining the approach, structure and governance for the effective financing and management of the Council's capital investment needs and ambitions. It outlines how capital investment contributes to the Council's priorities and how the Council's existing and proposed capital resources will be effectively managed to meet the planned needs plus opportunities for meeting the ambitions for longer term capital investments.
11. It is inevitable that the level of capital resources required to meet capital investment needs and aspirations will exceed the actual resources available. Therefore, one of the key purposes of the Capital and Investment Strategy is to ensure that capital projects or programmes are only approved where they accord with the capital investment principles.
12. The Council seeks to employ a variety of different resources to close the funding gap. In this context, the second key purpose of the Capital and Investment Strategy is to ensure that capital investment plans are affordable, prudent, sustainable and demonstrate value for money. It provides the framework for determining capital spending plans and the effective use of the Council's capital resources.
13. The capital programme is currently structured as follows:
 - **Pupil Place Plan:** including basic need (new schools and expansion), maintenance, health and safety and improvements
 - **Major Infrastructure:** including Growth Deal Infrastructure programme
 - **Highways and structural maintenance:** including street lighting, and bridges
 - **Property and Estates:** including the Property Investment Strategy health and safety, maintenance and improvements
 - **ICT Strategy:** including broadband and end user equipment
 - **Passported Funds:** including Disabled Facilities Grant and Devolved Schools Capital
 - **Vehicles and Equipment:** including fire and rescue vehicles and equipment
14. The Capital Programme is categorised between firm schemes that have been agreed to address identified need – the **Firm Programme**, and elements of the programme that are forecast costs to address predicted needs – the **Pipeline Programme**. Schemes in the Firm Programme have a defined scope with an initial cost estimate. Schemes in the Pipeline programme are subject to optioneering and feasibility assessment and have estimated costs. As such, these schemes may change in both scope and value before being agreed through the capital governance process and brought forward into the firm programme reflecting changes in the underlying need and value for money assessment.

The Oxfordshire Fair Deal Alliance's Priorities

15. The Capital and Investment Strategy underpins the significant contribution that the capital programme can make in delivering the Oxfordshire Fair Deal Alliance's nine priorities. These include investing in an inclusive, integrated and sustainable transport network, putting action to address the climate emergency at the heart of our work and improving access to nature and green spaces. Capital schemes can also contribute to creating opportunities for children and young people to reach their potential and to supporting carers and the social care system. This strategy also seeks to ensure that resources are used in the most efficient way and support the Council's objectives most effectively.
16. Funding needed for existing capital programmes and schemes has been reviewed alongside emerging investment pressures and the priorities of the Oxfordshire Fair Deal Alliance as part of the Budget & Business Planning Process.

Capital Investment Principles

17. Capital expenditure is defined as spending that creates an asset for the Council (e.g. buildings, vehicles and equipment), and spending which meets the definition in regulations specified under the Local Government Act 2003. This includes spend on non-current assets that are not owned by the Council such as academies and the award of capital grants and funding agreements.
18. The Council's approach to capital investment is integral to the Council's financial planning processes. The approach aims to ensure that:
 - Capital expenditure contributes to the achievement of the Oxfordshire Fair Deal Alliance's priorities and the Strategic Plan including commitment to put action to address the climate emergency at the heart of the council's work and to explore opportunities for social value;
 - An affordable and sustainable capital programme is agreed;
 - Use of resources and value for money is maximised;
 - A clear framework for making capital investment decisions is provided;
 - A corporate approach to the use of capital resources is maintained;
 - Sufficient assets to provide services are acquired, or built, and maintained;
 - Invest to save initiatives to make efficiencies within the Council's revenue budget are encouraged;
 - Investment in existing assets to enhance their value, including acquisition of land, is supported;
 - An appraisal and prioritisation process for new schemes is robust

Capital Programme Financing Principles

19. The Council's capital programme financing principles are:

- Non ringfenced capital grants are treated as a corporate resource and used flexibly.
- Capital receipts are treated as a corporate resource and used across the capital programme flexibly.
- The Council will continue to be proactive in ensuring, as far as possible, that all additional capital investment needs arising from new developments are funded from developer contributions.
- Ringfenced resources are used for the purposes for which they are issued.
- Prudential borrowing will only be considered where:
 - i. there is a robust invest to save model; or
 - ii. the council has a significant unmet capital need; or
 - iii. It contributes towards the overall investment approach

Investment Strategy for Property Investment

20. The Investment Strategy for Property Investment is required to be approved by Council annually and is included at Section 5.3. The strategy sets out an investment framework under which the Council can undertake investments and offers opportunities for generating long term and sustainable income streams through investment in asset classes with different attributes to investments currently held through Treasury Management activities. This diversifies the overall investment portfolio and enhances the financial resilience of the Council.

21. The Prudential Code requires that where authorities have commercial investments (Category D), they should disclose the contribution they make towards the service delivery objectives and/or place making role of the authority. In addition, the types of investment, due diligence processes, the proportionality of those investments and the local authority's risk appetite are also required to be set out. Currently no investments of this nature have been made but it may be possible to upgrade or extend empty buildings to generate rental income, for example, subject to business cases being agreed.

22. The Investment Strategy for Property Investment is supported by the Property Strategy (Section 5.4) which will identify opportunities for releasing Council owned assets to realise investment opportunities by achieving the key strategic objectives set out in the strategy to:

- support service delivery for the community
- deliver climate action priorities
- support and empower a more agile organisation
- achieve more value from the council's assets

Capital Programme Investment Overview

23. The Council's ten - year Capital Programme underpins the supporting strategies as well as the Oxfordshire Fair Deal Alliance's priorities and strategic plan and sets out the agreed capital investment to deliver those priorities.

24. The Council plans for a ten-year capital programme to ensure that schemes and programmes can be developed, delivered and funded over the medium term in line with the supporting strategies and the Financial Strategy.

25. The proposed capital programme for 2021/22 to 2031/32 totals £1,383.5m (excluding earmarked reserves). The proposed programme is based on the latest capital programme 2021/22 to 2030/31 as reported to Cabinet in the Capital Programme Monitoring Report in December 2021, including recommendations set out in the report. Proposed changes to the programme are set out in Section 5.5. Section 5.6 sets out the detailed draft Capital Programme for 2021/22 to 2031/32 by year and programme area. Some of the changes set out below reflect the addition of 2031/32 to the programme and extend the existing programme into that year.

26. The table below sets out the proposed programme by strategy and the split between the Firm Programme (£607.9m) and Pipeline Programme (£578.6m).

Strategy / Programme	Current Year 2021/22 £m	Proposed Firm Programme (2 years) £m	Proposed Pipeline Programme £m	Total Programme £m
Pupil Place Plan	37.8	86.9	122.2	246.9
Major Infrastructure	65.4	338.1	284.4	687.9
Highways Asset Management Plan	42.8	107.6	128.2	278.6
Property, Estates and Investment Strategy	11.4	47.5	25.4	84.3
ICT	7.6	14.9	7.6	30.1
Passported Funding	31.2	9.7	4.4	45.3
Vehicles and Equipment	0.8	3.2	6.4	10.4
Total Estimated Capital Programme Expenditure	197.0	607.9	578.6	1,383.5
Earmarked Reserves	0.0	12.6	82.0	94.6
Total Estimated Capital Programme	197.0	620.5	660.6	1,478.1

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27. The 2021/22 forecast of £197.0m is a reduction of £8.3m compared to the October Capital Programme and Monitoring report considered by Cabinet in December 2021. The main variation is a reprofile of £4.950m of spend on the LED Street Lighting Programme into 2022/23. The remaining changes are reported within the Major Infrastructure and Property, Estates & Investment programmes to reflect the updated position.

Pupil Place Plan - £246.9m

28. The Pupil Place Plan includes present and predicted future pupil numbers on roll, together with information about birth rates, school capacity, and new housing. The Plan sets out proposed changes in the number of school places available over the next year and it suggests where other changes may be necessary in the future. The updated Pupil Place Plan is set out at Annex 3 and is recommended to be endorsed by Cabinet.
29. The programme also includes investment to support the Special Educational Needs and Disability (SEND) Sufficiency Strategy which was agreed in December 2018. A public consultation on the Local area SEND Strategy which encompasses all the education, health and children's social care strands will be launched in January 2022. An update to the Strategy linked to the agreed principles of that consultation will then be completed.
30. Primary Education Sufficiency Planning: The number of primary pupils on roll at Oxfordshire's mainstream schools fell by 0.2% between the academic years 2018/19 and 2019/20, and then rose by 0.4% between 2019/20 and 2020/21. Reception numbers, which had been falling, increased by 1% between academic years 2018/19 and 2019/20, and again by 0.8% between 2019/20 and 2020/21 as a result of large-scale housing development underway and planned across the county. Current pupil projections anticipate a 1.2% increase in primary pupil numbers between 2020/21 and 2025/26.
31. Planning for primary school sufficiency is now more focused on housing growth, rather than birth-rate led pressure, and as a result growth in demand for school places will not be evenly spread between schools. In many areas the increases in capacity provided in recent years will be sufficient to meet the demand of the period covered by the Pupil Place Plan, but there will be some further expansions of schools in areas of housing growth. There will also be more new schools opened within significant housing developments.
32. Secondary Education Sufficiency Planning: Demand for secondary school places has been growing strongly in recent years and is expected to peak in 2022 then stabilise until growth resumes later in the decade. However as with primary provision, this pattern is not consistent across the county.
33. Total secondary pupil numbers are continuing to grow strongly – by 2.8% between the academic years 2018/19 and 2019/20 and by 2.6% between 2019/20 and 2020/21 – as the higher numbers in primary schools are now

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feeding through to secondary schools. Current pupil projections anticipate a 7.8% increase in secondary school pupil numbers between 2020/21 and 2025/26. The Council is working closely with secondary schools to ensure sufficient capacity as the population growth moves through into secondary school. As this growth follows a period of falling numbers, in some cases secondary schools have sufficient capacity to meet the population growth expected over the period covered by the Pupil Place Plan. Where schools are expected to need to expand, options for doing so are being explored. There will also be several new schools required, usually related to areas of significant housing growth.

34. Special Education Provision Sufficiency Planning: The SEND Sufficiency Strategy was approved by Cabinet in December 2018. Implementation of the strategy includes securing the opening of new special schools in Bloxham and Didcot; rebuilding and expanding Northfield School in Oxford (completed 2021); expanding John Watson School and Bardwell School (completed 2021/22); and extending the county's network of special needs resource bases. Work is underway to update the Strategy given that the rapid growth in demand for special school places continues to exceed the rate of population growth.
35. It is proposed to increase the Pupil Place Pipeline programme by £12.5m to reflect additional emerging need over the ten-year programme and to include an additional year for the annual maintenance programme in 2031/32. This is expected to be funded through basic need grant allocations and includes the additional School Condition Funding of £2.3m received in 2021/22.
36. Contingency of £7.0m, held in capital reserves, has been earmarked for potential additional costs of building new schools arising from changes to building regulations and consideration of a zero - carbon initiative for new schools.

Major Infrastructure - £687.9m

37. The current programme includes delivery of the Growth Deal Infrastructure Programme, Didcot Garden Town and the Science Bridge (HIF1) and the A40 Smart Corridor (HIF2). These schemes underpin the Oxfordshire Infrastructure Strategy (OxIS) which was agreed in 2017.
38. An updated Oxfordshire Infrastructure Strategy (OxIS) was commissioned on behalf of the Future Oxfordshire Partnership, to provide a holistic assessment of the infrastructure needs of the county aligned to the priorities of both the Future Oxfordshire Partnership and the district and city councils and to support the emerging Oxfordshire Plan 2050.
39. The OxIS Stage 1 Report provides a strategic framework for Oxfordshire County Council (OCC), Oxfordshire's four District and City Councils and key strategic partners to prioritise currently proposed infrastructure scheme

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investment aligned to the five OxIS themes as well as identify potential delivery and funding opportunities to 2040. This report will be followed by the OxIS Stage 2 Report in 2022 that will consider new proposals for strategic infrastructure required to meet Oxfordshire's needs in the period to 2050. The OxIS Stage 2 Report will be aligned with the Oxfordshire Plan 2050. This is a forthcoming Joint Statutory Spatial Plan identifying key areas where sustainable housing and employment growth can occur to 2050 and which will underpin the next iteration of Oxfordshire's Local Plans.

40. Cabinet will be asked to endorse OxIS Stage 1 in February 2022 and future schemes will be considered and prioritised against the strategic framework set out in the Stage 1 report.

Zero Emission Bus Regional Areas (ZEBRA)

41. As set out in the report elsewhere on the January 2022 Cabinet agenda, Oxfordshire is one of 17 local transport authorities in England to be invited to submit a full Business Case for its Zero Emission Bus Regional Areas (ZEBRA) scheme, in support of the Government's Road to Zero Strategy for transition to zero emission transport by 2050.
42. If successful, this bid would support a number of the Oxfordshire Fair Deal Alliance's priorities related to health and well-being, climate action, and air quality. A reduction in bus emissions in Oxford would contribute to better air quality and better environments for all users as well as reducing transport's contribution to climate change. Electric buses may also improve the image of buses and the passenger experience, helping to boost bus use and reduce traffic congestion.
43. The total cost of the buses and associated works is estimated at £78.7m. This would be met through bus operator investment of £40.6m plus a bid for Department for Transport grant funding of £32.1m. However, Oxford Bus Company and Stagecoach have indicated that they may require additional financial assistance to make the ZEBRA scheme financially feasible. It is proposed to add £6m funding to the capital programme in 2022/23 to fund additional council grant towards the costs of the ZEBRA scheme. This will be funded from the council's reserves (see Section 5.6 for more detail).
44. Part of the cost to be met by the bus companies will be supported through savings to be achieved as a result of improvements to bus journey times expected to be achieved through the Bus Service Improvement Plan. If these do not materialise or are not agreed there is a risk that the council's contribution would need to increase.

A423 Improvements Programme (incorporating Kennington Bridge)

45. Routine planned maintenance of the A423 at Kennington was planned to take place in 2018/19. Following commencement of this work it was identified that the bridge was in worse condition than expected and that the cost of fully repairing the bridge would be similar to replacing it.

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46. In June 2020, an outline business case was approved for a more comprehensive A423 Improvement Programme. This was developed from 2020-21 and offers the following benefits:
 - a. The replacement of the Kennington Railway Bridge
 - b. Improvements to the Hinksey streams as an enabler to the Oxford Flood Alleviation Scheme
 - c. A new eastbound lane dedicated for bus and Park & Ride traffic from Old Abingdon Road to Redbridge Park & Ride
 - d. An upgrade to existing foot and cycleways in line with LTN1/20
47. The A423 improvements programme and the Oxford Flood Alleviation Scheme combined will offer vital benefits for access to Oxford, as well as improvements for National Highways and Network Rail.
48. The inclusion of the new bus lane and the benefits offered are only able to be realised due to the bridge replacement. The bus lane offers an improvement in journey time in both the morning and afternoon peak and is expected to reduce queuing on the A34.
49. The replacement of the bridge enables the additional height required by Network Rail for future electrification of the main line.
50. The Railway Bridge replacement is a crucial part of the Oxford Flood Alleviation Scheme (OFAS) as floodwater from the scheme needs to pass under it to re-join the River Thames and ensure the efficient movement of water through the floodplain; the scheme can only work if there are larger channels in this location.
51. The current approved budget for the scheme is £53.0m based on the feasibility design work undertaken at June 2020. However, the design has since progressed and it is proposed to increase the budget provision by £37.2m to £90.2m.
52. The reasons for the increase are as follows:
 - Additional cost related to the bus lane and shared use path.
 - Increase in bridge height to allow for Network Rail futureproofing for overhead line electrification
 - Scope changes to include in-channel works for the Environment Agency.
 - Additional design costs
 - Additional utility diversion & Network Rail costs
 - Inflationary impacts
53. The scheme cost reflects the construction constraints and complexities of working near the railway line, watercourse, and utilities at the site including

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high power overhead electricity cables, water, gas and telecoms crossing the site. Traffic management and enabling works requirements to accommodate maintaining traffic flow are a substantial cost to the scheme.

54. £4.0m funding from the Environment Agency related to the Oxford Flood Alleviation Scheme will be used to support the £37.2m increase in the scheme cost. A further £6.0m is being sought from Network Rail to support the cost of futureproofing for electrification. If this funding is not secured a further decision would be required on whether to continue with this element of the scheme. The remaining £27.2m is proposed to be met through prudential borrowing.

Major Infrastructure Contingency

55. As noted in the capital monitoring reports to Cabinet in 2021/22 there are a number of factors increasing the risk to the deliverability and cost of capital schemes in 2021/22 and beyond. These include supply chain issues and inflation, labour market supply, the on-going impact of COVID-19, and the HS2 project absorbing market capacity
56. The combined impact of these factors is affecting delivery across three key areas:
 - i. Workforce – both skilled and unskilled
 - ii. Availability of materials
 - iii. Contract price
57. Difficulties in obtaining the right skills and or materials, at the right time could put further pressure on the overall cost of projects and will present increased challenges with programming. General uncertainty in the market is also impacting on the risk contractors are comfortable to take when bidding for work. Prices, which used to be held for several months, are now being held for a number of days so contract prices are much more volatile. These risks are particular significant for major infrastructure projects where the Council is potentially exposed to any increases in costs and where there are fixed-value grants or contributions from other parties.
58. The Council needs to allow for a series of potential outcomes in respect of these major schemes. Forecasting precise need is difficult in a very uncertain environment. However, reflecting this increased risk, £50m is proposed to be added to the contingency held for major infrastructure schemes. This would be funded through prudential borrowing, and the cost of this borrowing is allowed for in the revenue budget. Pending this risk materialising, the funding to support the cost of the borrowing will be held in the prudential borrowing reserve.

Highways Asset Management Plan - £278.6m

59. The current [Highways Asset Management Plan](#) was agreed by Council in February 2020 and reviewed in January 2021. Locality engagement underpinning an update to the Plan will be undertaken in early 2022 and the expectation is that a revised plan will be agreed by Cabinet in July 2022. The programme includes an additional £80m investment funded by prudential borrowing that was agreed in September 2018. This investment is being made over five years so 2022/23 will be the fourth year.
60. It is proposed to increase the funding for bridges structural maintenance by £2.7m funded by prudential borrowing to support feasibility work to underpin a robust forward programme, as well as undertaking some additional lower cost repairs.
61. It is also proposed to provide funding of £0.5m towards the pedestrianisation of Broad Street in Oxford. Building on the trial undertaken by Oxford City Council in 2021 the intention is to undertake further work to provide a space for the benefit of pedestrians and to support improvements to the environment through the removal of on-street parking.
62. On 19 October 2021 Cabinet agreed a new countywide 20mph speed restriction approach in areas that have traditionally mainly been 30mph limits. The intention is to enhance and create an environment that is more appropriate for our active neighbourhoods: promoting lower vehicle speeds, encouraging more walking and cycling, and supporting a sense of a community place. A key part of the new approach is to promote implementation of 20 mph orders using signage only so it is proposed to add funding of £8m to the capital programme, funded by reserves (see Section 5.5 for more detail), to support the implementation of 20mph speed limits across Oxfordshire for roads that are clearly part of a residential setting, or in areas where people are moving around for leisure, business, or services. This proposal is consistent with Cabinet's commitment to "accelerate our support for communities in implementing 20mph zones" and is made to help to deliver the policy objective of "increased investment in an inclusive, integrated, county-wide active and sustainable travel network fit for the 21st century to improve choice and reduce car journeys across the county".
63. It is proposed to increase the Structural Maintenance Pipeline programme by £15.2m to include an additional year for the annual maintenance programme in 2031/32. This will be funded from the annual block allocation.
64. It is also proposed to add £0.8m additional funding for improvements to Public Rights of Way funded by S106 contributions that the council is holding. Funding of £2.7m is proposed to be added for cameras to enforce the Part 6 Moving Vehicle Violations to improve road safety and traffic flow. £1.3m is expected to be funded by prudential borrowing with the remainder expected to be funded by income from the fines.

Estates and Strategy for Property Investment - £84.3m

The current programme includes a budget of £11.7m to support the Investment Strategy. It is proposed to increase this by £5.5m funded by prudential borrowing to fund additional invest to save projects. These will include gaining planning consent to add value to surplus land and buildings, rationalising office space, co-locating services in fewer buildings and upgrading or extending empty buildings to maximise income generation. Co-location is expected to bring opportunities to reduce running costs, release assets for income generation, enhance customers' experience and enable cross fertilisation between council service areas. Savings arising from these schemes will need to be considered through future Budget and Business Planning processes.

65. Investment grade audits of key council's properties will be carried out in the first quarter of 2022/23. The outcome of that exercise will be used to inform a full review of the Property Strategy later in the year. It will also identify the investment needed to bring the Council's key property assets up to the necessary standard, including enhancements to achieve carbon zero.
66. The Council's emerging Decarbonisation Strategy will identify the scale of the future investment necessary to achieve net carbon zero by 2030
67. It is proposed to increase the corporate estates programme by £1.0m funded through prudential borrowing to fund decarbonisation and condition related works to the corporate estate.

Service Requirements

68. A further £11.0m funding funded by prudential borrowing is proposed to be added to the programme to support new service requirements, in addition to £1.0m Section 106 funding towards the proposed relocation of Banbury Library linked to the [Libraries & Heritage Services: A Strategic Framework 2021-2026](#). Subject to business cases being developed and approved corporate funding is expected to be used to support the development of schemes that help to deliver service strategies, reduce demand and increase service provision in Oxfordshire, and support the Oxfordshire Fair Deal Alliance's priorities. For example, the types of schemes that could be supported by the £11.0m are:

- Additional children's residential care provision: The national shortage, or sufficiency of children placements is impacting Oxfordshire's ability to place children and the council has identified local expansion of residential placements for children as one of its priorities for 2022/23.
- Additional Supported Living Housing provision to enable more adults of working age with assessed social care needs to live independently within Oxfordshire.
- Improvements to Household Waste Recycling Centres.

69. Where schemes are funded by prudential borrowing the business case will need to set out the potential for future service savings to offset the cost of the borrowing as well as wider service benefits.

ICT - £30.1m

70. The Information and Communication Technology Strategy was approved by Cabinet on 19 December 2019. It is proposed to utilise £1.0m surplus funding available through the Better Broadband for Oxfordshire project to support the roll out of fibre Broadband for public buildings.
71. The ICT programme also includes the Rural Broadband and the Rural Gigabit Hub site programmes.

Passported Funding - £45.3m

72. Passported funds are funds transferred to third parties to deliver schemes, usually through a funding agreement.
73. Most of the on-going funding from 2022/23 onwards relates to the Disabled Facilities Grant which is part of the Better Care Fund and is required to be passported to the City and District Councils for delivery. A further year of funding has been added to the programme in 2022/23 (£6.7m).
74. As the Accountable Body for the Oxfordshire Local Enterprise Partnership (OxLEP), the Council's capital programme also includes schemes delivered by third parties on behalf of OxLEP which are funded by government grant. These schemes are expected to be completed by the end of 2021/22 but there are expected to be some residual costs in 2022/23 relating to the council's use of Freedoms and Flexibilities to support the delivery of schemes.

Vehicles and Equipment - £10.4m

75. It is proposed to increase the programme by £0.8m to add an additional year for the annual Fire & Rescue Service vehicle replacement programme in 2031/32. This will be funded from revenue.

Capital Programme Financing Overview

76. The Capital Programme is fully funded over the ten - year period. The table on the next page sets out the resources expected to be used to deliver the capital programme.

Financing	Total Programme £m
Section 106 and Community Infrastructure Levy	236.4
Grants and contributions	790.7
Prudential Borrowing	314.3
Capital receipts	69.0
Revenue Contribution	38.6
Subtotal	1,449.0
Capital Reserves	29.1
Total Financing	1,478.1

77. When necessary, the Capital Programme can fund schemes in advance of receiving specific funding by utilising other resources within the wider programme on an interim basis.
78. The Capital Programme includes a total prudential borrowing requirement of £314.3m. The Treasury Management Strategy (Section 5.2) sets out the Council's strategy for financing this borrowing requirement through both internal and external borrowing.
79. The Treasury Management Strategy also sets out the Council's approach to the investment of cashflows arising from the Council's Capital Programme and Medium Term Financial Strategy.

Governance Arrangements

80. The Prudential Code sets out that the responsibility for decision making and on-going monitoring in respect of capital expenditure, investment and borrowing, including prudential indicators, sits with full council. However, detailed implementation and monitoring may be delegated to a committee.
81. Council and the Cabinet are the key democratic decision-making bodies as per the Council's constitution. The Council approves the key policy documents and the capital programme as part of the Council's Policy and Budgetary Framework. The Cabinet recommends priorities, policy direction and the capital programme to the Council for approval. The Cabinet also approves new inclusions to the capital programme in line with the scheme of delegation and the financial procedure rules.
82. Delegations to officers are set out in full in Section 5 of the Council's Financial Regulations and all officers are bound by the scheme of delegation.
83. The Section 151 Officer, jointly with the Corporate Directors with responsibility for delivery of the Capital Programme, are responsible for ensuring that

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appropriate arrangements are in place to monitor the capital programme and resources. To facilitate this, capital budgets and project scope are agreed and updated through a Business Case process from scheme optioneering through to scheme completion.

84. A review of the governance processes underpinning the capital programme and delivery is being undertaken in early 2022. Linked to this the revenue budget includes proposed funding of £0.130m from 2022/23 for additional on-going staffing capacity to strengthen the co-ordination and oversight of the capital programme.

Minimum Revenue Provision Policy Statement for 2022/23

1. The Council is required by statute to charge a Minimum Revenue Provision (MRP) to the General Fund Revenue account each year for the repayment of debt. The MRP charge is the means by which capital expenditure which has been funded by borrowing is paid for by council taxpayers.
2. Legislation¹ requires local authorities to draw up a statement of their policy on the annual MRP, for full approval by Council before the start of the financial year to which the provision will relate.
3. The implementation of the International Financial Reporting Standards (IFRS) requirements brought some service concession arrangements on balance sheet and resulted in some leases being reclassified as finance leases instead of operating leases. Part of the service charge or rent payable is taken to reduce the balance sheet liability rather than being charged to revenue accounts. To ensure that this does not result in a one-off increase in the capital financing requirement and in revenue account balances, an amount equal to the amount that has been taken to the balance sheet is included in the annual MRP charge.
4. The Council is recommended therefore to approve the following statement:

For capital expenditure incurred before 1 April 2008, the MRP policy for 2017/18 onwards will be a straight-line charge of the outstanding pre-2008 expenditure as at 1 April 2017 calculated over a 50-year period.

For all unsupported (prudential) borrowing, the MRP policy will be based on the estimated life of the assets for which the borrowing is undertaken (Option 3 – Asset Life Method or Annuity Method).

In the case of finance leases and on-balance sheet Private Finance Initiative (PFI) type contracts, the MRP requirement will be regarded as being met by a charge equal to the element of the rent/charge that goes to write-down the balance sheet liability, including the retrospective element in the first year (Option 3 in modified form).

¹ Statutory Instrument 2008 no. 414 s4

Prudential Indicators for Capital Finance

1. The Prudential Code for Capital Finance in Local Authorities (2017) requires the Council to set and monitor against Prudential Indicators in the following categories:
 - Prudence – Capital Expenditure and External Debt
 - Affordability
 - Treasury Management
2. The indicators have been based on the February 2022 capital programme which will be approved by Council on 9 February 2022 with the Business and Budget Planning Report.
3. The capital expenditure figures for beyond 2023/24 will be able to be revised in twelve months' time.

Prudence

Estimates of Capital Expenditure

4. The Council is required to make reasonable estimates of the total of capital expenditure (including earmarked reserves) that it plans to incur during 2022/23 and the following two financial years. The Council must also approve the actual expenditure for 2020/21 and revised forecast expenditure for 2021/22. The table shows the actual capital expenditure for 2020/21 and how that was financed. It also shows the estimated capital expenditure and financing from 2021/22 to 2025/26.

Capital Programme Estimates	2020/21 Actual £m	2021/22 Estimate £m	2022/23 Estimate £m	2023/24 Estimate £m	2024/25 Estimate £m	2025/26 Estimate £m
Capital Expenditure	153.5	197.0	300.1	320.3	285.2	150.4
Financed by:						
Prudential Borrowing	0.2	65.6	63.3	84.4	34.1	62.0
Grants and Contributions	151.7	130.4	230.8	181.1	232.7	77.1
Capital Receipts	0.0	0.0	0.0	32.5	1.9	1.9
Revenue	1.6	1.0	6.0	17.9	4.0	1.0
Reserves	0.0	0.0	0.0	4.4	12.5	8.4
Total Capital Investment	153.5	197.0	300.1	320.3	285.2	150.4

The Capital Financing Requirement

5. Estimates of the end of year Capital Financing Requirement (CFR) for the Authority for the current and future years and the actual Capital Financing Requirement at 31 March 2021 that are recommended for approval are set out in the table below. The actual CFR for 2020/21 was £328.092m. The estimate for 2021/22 is £386.445m and for 2022/23 £451.827m.

Year	Actual/Estimate	£m
2020/21	Actual	328.092
2021/22	Estimate	386.445
2022/23	Estimate	451.827
2023/24	Estimate	512.789
2024/25	Estimate	537.096
2025/26	Estimate	580.920

6. The Capital Financing Requirement measures the authority's underlying need to borrow for a capital purpose. In accordance with best professional practice the County Council does not associate borrowing with particular items or types of expenditure. The authority has an integrated Treasury Management Strategy and has adopted the CIPFA Code of Practice for Treasury Management in the Public Services. The Council has, at any point in time, a number of cashflows both positive and negative, and manages its treasury position in terms of its borrowings and investments in accordance with its approved treasury management strategy and practices. In day-to-day cash management, no distinction can be made between revenue cash and capital cash. External borrowing arises as a consequence of all the financial transactions of the authority and not simply those arising from capital spending. In contrast, the capital financing requirement reflects the authority's underlying need to borrow for a capital purpose.

Authorised Limit and Operational Boundary for External Debt

7. The Authority has an integrated treasury management strategy and manages its treasury position in accordance with its approved strategy and practice. Overall borrowing will therefore arise as a consequence of all the financial transactions of the Authority and not just those arising from capital spending reflected in the CFR.

8. The Authorised Limit sets the maximum level of external debt on a gross basis (i.e. excluding investments) for the Authority. It is measured on a daily basis against all external debt items on the Balance Sheet (i.e. long and short-term borrowing, overdrawn bank balances and long-term liabilities). This Prudential Indicator separately identifies borrowing from other long-term liabilities such

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as finance leases. It is consistent with the Authority's existing commitments, its proposals for capital expenditure and financing and its approved treasury management policy statement and practices.

9. The Authorised Limit is the statutory limit determined under Section 3(1) of the Local Government Act 2003 (referred to in the legislation as the Affordable Limit).
10. The Operational Boundary has been set on the estimate of the most likely, i.e. prudent but not worst-case scenario with sufficient headroom over and above this to allow for unusual cash movements. The Operational Boundary links directly to the Authority's estimates of the CFR and estimates of other cashflow requirements. The table shows the operational boundary for external debt remains within the authorised limit for external debt throughout the period 2021/22 to 2025/26.

	2021/22 Probable outturn £m	2022/23 Estimate £m	2023/24 Estimate £m	2024/25 Estimate £m	2025/26 Estimate £m
Operational Boundary for External Debt					
Borrowing	400.000	470.000	530.000	560.000	600.000
Other long-term liabilities	25.000	25.000	25.000	25.000	25.000
TOTAL	425.000	495.000	555.000	585.000	625.000
Authorised Limit for External Debt					
Borrowing	410.000	580.000	540.000	570.000	610.000
Other long-term liabilities	30.000	30.000	30.000	30.000	30.000
TOTAL	430.000	610.000	570.000	600.000	640.000

Actual External Debt

11. This indicator enables the comparison of Actual External Debt at year end to the Operational Boundary and Authorised Limit. Total external debt as at 31.03.21 was £352.253m.

Total External Debt as at 31.03.21	£m
External Borrowing	335.383
Other Long-term Liabilities	16.970
Total	352.353

Gross Debt and the Capital Financing Requirement

12. This is a key indicator of prudence. In order to ensure that the medium-term debt will only be for a capital purpose, the local authority should ensure that

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the gross debt does not, except in the short term, exceed the total of the capital financing requirement (CFR) in the preceding year plus the estimates of any additional increases to the capital financing requirement for the current and next two financial years.

13. In 2020/21 the CFR was marginally lower than gross debt, indicating a level of borrowing in advance of need. However, from 2021/22 onwards the CFR is forecast to be higher than the level of external borrowing which indicates a level of internal borrowing over the medium term, consistent with the approach set out in the Treasury Management Strategy, taking into account current commitments, existing plans and the proposals in the approved budget.

Debt	31.03.21 Actual £m	31.03.22 Revised £m	31.03.23 Estimate £m	31.03.24 Estimate £m	31.03.25 Estimate £m	31.03.26 Estimate £m
External Borrowing	335.383	313.383	352.383	413.383	437.383	481.383
Long Term Liabilities	16.970	16.391	15.736	14.997	14.161	13.217
Total Debt	352.353	329.774	368.119	428.380	451.544	494.600

Affordability

The Ratio of Financing Costs to the Net Revenue Stream

14. This is an indicator of affordability and highlights the revenue implications of existing and proposed capital expenditure by identifying the proportion of the revenue budget required to meet financing costs. The definition of financing costs is set out in the Prudential Code. The ratio of financing costs to the net revenue stream is estimated to remain within 4-6% in each year and was 4.56% in 2020/21.

Year	Actual/ Estimate	Financing Cost £m	Net Revenue Stream £m	Ratio %
2020/21	Actual	23.218	509.160	4.56
2021/22	Estimate	23.272	532.521	4.37
2022/23	Estimate	25.541	549.355	4.65
2023/24	Estimate	29.183	560.534	5.21
2024/25	Estimate	33.246	578.626	5.75
2025/26	Estimate	35.731	598.082	5.97

15. Financing costs include interest payable on borrowing, interest and investment income and the amount required for the minimum revenue provision (MRP).

The Ratio of Net Income from Commercial and Service Investments to the Net Revenue Stream

16. This is an indicator of affordability and is intended to show the financial exposure of the authority to the loss of income from commercial and service investments. The definition of commercial and service income is set out in the Prudential Code. Based on current activity the ratio of service income compared to the net revenue stream remains at a maximum of 0.05% from 2021/22 to 2025/26.

Year	Actual/ Estimate	Commercial & Service Income (*) £m	Net Revenue Stream £m	Ratio %
2021/22	Estimate	0.000	532.521	0.00
2022/23	Estimate	0.109	549.355	0.02
2023/24	Estimate	0.197	560.534	0.04
2024/25	Estimate	0.280	578.626	0.05
2025/26	Estimate	0.292	598.082	0.05

(*) Estimated annual cash yield from the council's £5m Service Investment in the Resonance Supported Homes Fund.

Oxfordshire County Council

Pupil Place Plan

2021/22 - 2025/26

January 2022



For school planning purposes, Oxfordshire is divided into 23 learning communities, which are defined by secondary schools and their feeder primary schools; towns which have more than one secondary school are treated as a single learning community – e.g. Witney. The data and strategy sections of this Pupil Place Plan are organised by learning community, and pupil forecasts have been provided at this level.

Some learning communities are then divided into smaller planning sub-areas, based on criteria set out by the Department for Education including the geographic characteristics of the area, distances between schools and parental preference patterns. For example, Witney is divided into Witney North and Witney South sub-areas based on the designated areas of the two secondary schools. Within each area strategy section, comments are provided at planning sub-area level.

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For further information about school place planning, in the first instance contact the School Organisation & Planning team:

school.planning@oxfordshire.gov.uk

1. INTRODUCTION

Oxfordshire County Council sees its democratic mandate as having regard for the educational outcomes for all Oxfordshire children and young people in state funded education, regardless of the status of the provider institutions.

The county council has a statutory duty to ensure that sufficient places are available within their area for every child of school age whose parents wish them to have one; to promote diversity, parental choice and high educational standards; to ensure fair access to educational opportunity; and to help fulfill every child's educational potential.

We also have a responsibility to ensure, as far as reasonably practicable, that there are sufficient childcare places to ensure that families can:

- a) access the funded early education entitlements for their child;
- b) take up, or remain in work; or
- c) undertake education or training, which could reasonably lead to work.

The county council also has a duty to respond to any representations from parents who are not satisfied with the provision of schools in the local area. This could be regarding the size, type, location or quality of school provision.

Since 2011, new providers of school places have been able to establish state-funded free schools outside of the local authority school planning process, and now all new schools are deemed to be free schools. There are also a growing number of schools that have converted to become academies, which are also independent of local authority control.

School places are no longer, therefore, solely provided by the county council, and the council must work with these other providers to ensure that the need for school places is met. However, the county council has a unique responsibility to make sure there are enough school and childcare places available for local children and young people. No other local or national body shares the duty to secure sufficient primary and secondary schools.

Although there has been no statutory requirement to publish a School Organisation Plan since 2004, it is considered good practice to produce a plan related to pupil place planning to clearly set out the framework for, and approach towards, the provision of places.

This Pupil Place Plan shows local communities, and those interested in their development, how we expect school provision to change over the next few years. It brings together information from a range of sources and sets out the issues the county council will face in meeting its statutory duties for providing nursery and school places up to 2025 and beyond.

The Plan includes present and predicted future pupil numbers on roll, together with information about birth rates, school capacity, and new housing. The Plan sets out proposed changes in the number of school places available over the next year and it suggests where other changes may be necessary in the future. The Plan also sets out our policies on school organisation and the statutory framework for making changes such as opening, closing or enlarging schools.

2. SCHOOL ORGANISATION CONTEXT

Oxfordshire is a county which is experiencing rapid growth and this is having a significant impact on school planning. Having an up-to-date Pupil Place Plan provides an essential framework for effective planning within this context. An updated plan also provides key partners with trends and data to inform their future decision-making. This Plan is updated and approved annually.

Oxfordshire is a more rural county than South East England as a whole, with one third of the population living in rural areas; primary education in particular plays a critical role in community cohesion and supporting both rural and urban communities. 26% of Oxfordshire's total population is aged 18 or under.

2.1 Oxfordshire's education providers

Early education

Local authorities are not expected to deliver early years provision themselves but to work with providers, including maintained schools, in order to ensure there is sufficient provision available to meet families' needs.

Delivery of early education and childcare provision in Oxfordshire is through a mixed market of private and voluntary providers, including pre-schools, day nurseries and childminders, and through schools, including academies and free schools. There are also seven local authority maintained nursery schools.

The Council publishes an annual Childcare Sufficiency Assessment which is available at www.oxfordshire.gov.uk/cms/content/childcare-sufficiency-market-assessment.

Primary education

As of October 2021, Oxfordshire is home to 243 state sector mainstream schools providing primary education, two of which also provide secondary education. Included in this total are three Infant schools and two Junior schools; all other primary schools provide education for children aged 4-11, and many also offer places for younger children, either directly or through co-located private, voluntary and independent childcare providers of funded early years education. The county council has an above average number of pupils being admitted to their first-choice school, with 93% of on-time applicants offered their first preference primary school for September 2021.

In 2009 the DfE approved a 'Primary Strategy for Change for Oxfordshire'. Through a process of locality review and joining up funding streams, the aim is to provide an outstanding primary school in the heart of the community. The principle of, wherever possible, 1 form entry and 2 form entry schools (i.e. admission numbers of 30 or 60) being the preferred model of school organisation in Oxfordshire was acknowledged. This means that schools are ideally organised to allow admission of one full form of entry or two full forms of entry in any one year. This allows classes to be organised as multiples of 30 pupils per year group which conforms to statutory class size requirements and most effective use of revenue resources.

Intakes of 15 and 45 are also models which are used in many county schools: these models require by definition some mixed year group teaching, usually with two year groups per class. In some schools, local conditions require intakes such as 10 or 20 per year, which require a greater degree of mixed age teaching.

Secondary education

As of October 2021, Oxfordshire is home to 41 state sector mainstream schools currently providing secondary education (two of which are all-through schools also providing primary education); these include two schools providing only for the 14-19 age range: Futures Institute Banbury (formerly Banbury Space Studio, opened 2014), and UTC Oxfordshire in Didcot (opened 2015).

The most common model of curriculum delivery is 11-18 years with a sixth form, although there are four south Oxfordshire schools currently offering 11-16 study only. Two of Oxfordshire's schools provide "all-through" primary and secondary education. Studio Schools and University Technical Colleges cater for the 14-19 age range.

- **University Technical Colleges** (UTC) specialise in subjects that need modern, technical, industry-standard equipment such as engineering and construction, teaching these disciplines alongside business skills and the use of ICT. They are sponsored by a local university and employers, and often work in partnership with FE colleges and established academy trusts. They are usually for 500-800 students.
- **Studio Schools** are small schools for 300 students. With year-round opening and a 9-5 working day, they feel more like a workplace than a school. Working closely with local employers, studio schools offer a range of academic and vocational qualifications including GCSEs in English, Maths and Science, as well as paid work placements linked directly to employment opportunities in the local area.

Specialist education

Oxfordshire is home to 15 state sector schools providing specialist provision for children with special educational needs, including one Alternative Provision Academy (Pupil Referral Unit) and one Hospital School.

These include eight community based special schools providing for children aged 2 to 19 with severe learning difficulties, and profound and multiple learning difficulties. There is countywide provision for children with social, emotional and mental health difficulties, primary and secondary to age 18, and a countywide residential academy for children with autism, severe learning difficulties and challenging behaviour.

Two new special schools are planned, one in Bloxham and the other in southern Oxfordshire, which will focus on social, emotional and mental health needs and autism. The first of these, Bloxham Grove in north Oxfordshire, is due to open for the 2023 school year.

In addition, some mainstream schools include specialist resource bases to provide additional support to children with high level and more complex needs, including hearing impairment, autism, language and communication needs, physical disabilities and moderate learning difficulties. Oxfordshire is working to increase the number of

bases in the coming years: in some cases this will be through including them within existing schools and, in addition, planned new schools are specified to incorporate resource bases, unless there is already one serving the area.

All pupils attending a special school or specialist resource base in Oxfordshire will have an Education, Health and Care Plan, or be undergoing an assessment of their special educational needs. The decision about admission to a special school or resource base is based on clearly defined indicators. Each child is considered carefully according to their needs by a panel of experienced professionals. Parental views are taken into consideration.

School planning areas

For school planning purposes, Oxfordshire is divided into 23 learning communities, which are defined by secondary schools and their feeder primary schools; towns which have more than one secondary school are treated as a single learning community – e.g. Witney. The data and strategy sections of this Pupil Place Plan are organised by learning community, and pupil forecast have been provided at this level.

Some learning communities are then divided into smaller planning sub-areas, based on criteria set out by the Department for Education including the geographic characteristics of the area, distances between schools and parental preference patterns. For example, the Witney learning community is divided into Witney North and Witney South planning sub-areas based on the designated areas of the two secondary schools. Within each area strategy section, comments are provided at planning sub-area level.

2.2 Policies and legislation

Set out below is a summary of key national legislation and local policies affecting school organisation.

Early education and childcare sufficiency

Provision of early education and childcare is vital for the local economy, and for developing stronger communities. One aim of childcare is to ensure parents are supported to be economically active, either in work, or in study or training for work. Early education focuses on the specific learning needs of very young children, and the benefits can extend far beyond the early years - children build confidence, develop their fine and gross motor skills, and expand their communication and social skills through play and exploration. All of this helps to ready them for lifelong learning, as well as preparing them to go to school. Funded early education for 2-year-old children aims to reduce levels of inequality and narrow the pre-school educational gap between disadvantaged and better off children.

Local Authorities are required to secure sufficient early years and childcare provision (*Childcare Act 2016; Childcare Act 2006; Children and Families Act 2014; The Local Authority (Duty to Secure Early Years Provision Free of Charge) Regulations 2014; The Local Authority (Duty to Secure Early Years Provision Free of Charge) (Amendment) Regulations 2016; The Childcare (Early Years Provision Free of Charge) (Extended Entitlement) Regulations 2016*)

- **Sufficient childcare** means securing the right type and volume of provision, so far as is reasonably practicable, for working parents, or parents who are studying or training for employment, for children aged 0-14 (up to 18 for a disabled child).
- **Sufficient early years provision** means families being able to access their free entitlement for qualifying 2, 3 and 4-year-old children.

Alongside the free entitlement some parents will wish to purchase additional childcare hours from their provider where, for example, they require more childcare to be able to work.

The 2021 annual review of early years sufficiency has confirmed several areas with potential place shortfalls including South East Didcot, Chinnor, Grove and South and East Cherwell. Parts of Oxford City also have limited places, although these are often offset by easily accessible places in an adjacent area of the city. It is important to note that early years sufficiency can change very quickly, for example if a key provider closes or receives a poor Ofsted judgement. Work will continue to identify areas which may be vulnerable and also where additional provision will be needed due to housing growth. Further detail can be found in Oxfordshire County Council's annual Childcare Market Assessment

(www.oxfordshire.gov.uk/cms/content/childcare-sufficiency-market-assessment)

School places - local authorities' statutory duties

Education authorities have statutory duties to:

- Ensure sufficient school places (*Education Act 1996* Section 14).
- Increase opportunities for parental choice (Section 2 of the *Education and Inspections Act 2006*, which inserts sub-section 3A into S14 of the *Education Act 1996*).
- Comply with any preference expressed by parents provided compliance with the preference would not prejudice the provision of efficient education or the efficient use of resources (*School Standards and Framework Act 1998* Section 86).
- Ensure fair access to educational opportunity (Section 1 of the *Education and Inspections Act 2006* inserts sub-section 1(b) into S13 of the *Education Act 1996*).

Paragraph 95 of the *National Planning Policy Framework* (NPPF) states that it is important that a sufficient choice of school places is available to meet the needs of existing and new communities, and that local planning authorities should take a proactive, positive and collaborative approach to meeting this requirement, and to development that will widen choice in education. This includes local planning authorities giving great weight to the need to create, expand or alter schools when preparing plans and making decisions on planning applications.

Policy on spare school places

Not all unfilled school places can be considered "surplus". The Audit Commission advises that some margin of spare school capacity is necessary to provide some flexibility for unexpected influxes of children and expressions of parental preference. The 2013 National Audit Office report *Capital Funding for New School Places*

suggested it is “reasonable for authorities to aim for between 5 and 10 per cent primary surplus to allow them some opportunity to respond to parental choice” (para 1.17) and that 5% is “the bare minimum needed for authorities to meet their statutory duty with operational flexibility, while enabling parents to have some choice of schools” (para 1.16).

The 2004 Oxfordshire School Organisation Plan, which was adopted by the Oxfordshire School Organisation Committee acting under its statutory powers at that time contained within the School Standards and Framework Act 1998, set a target figure of 10% unfilled primary and secondary places as sensible for planning purposes in the county. For primary schools this was further refined to targets of 8% spare places in urban areas and 12% in rural areas in the Oxfordshire Primary Strategy for Change, which was first approved by OCC Cabinet in July 2006, and finally approved by DfE in 2009.

For school place planning purposes, these targets are applied to planning areas as set out in this Pupil Place Plan.

Similarly, for early education some spare places are required to ensure reasonable accessibility and an opportunity for parental choice. It should also be noted that any apparent surplus places in early years provision may not necessarily be available to all children, for example workplace nurseries may be primarily for employees’ children. In addition, early years pupil numbers can vary considerably across the year.

Special Educational Needs & Disabilities (SEND)

The *Children and Families Act 2014*, along with associated statutory guidance (*SEND Code of Practice 2015*) and other legislation, sets out the county council’s duties towards children and young people with special educational needs or disabilities. In addition, schools and local authorities have a duty to provide reasonable adjustments for disabled pupils, originally under *the Disability Discrimination Act 1995* and more recently under the *Equality Act 2010*. Oxfordshire County Council’s Accessibility Strategy (2013) sets out how it proposes to increase access to education for disabled pupils in the existing schools for which it is responsible, the reasonable adjustments duties and examples of good practice.

In parallel to the development of new mainstream primary and secondary school capacity, the council has a duty to ensure sufficient provision for children with special educational needs. In December 2018, the Council approved a SEND Sufficiency of Places Strategy (available at <https://www.oxfordshire.gov.uk/residents/schools/our-work-schools/planning-enough-school-places>) which provides more detail on the county’s planning to meet the rising demand for specialist provision for children and young people with SEN and Disabilities. This strategy focuses on the five-year period 2018-2022, but also looks beyond to the following five-year period to 2027. Work is now underway to update the strategy based on continued trends towards an increased percentage of pupils receiving an Education, Health & Care Plan, and particularly rapid growth in diagnoses of Autism Spectrum Disorder (ASD) and Social, Emotional & Mental Health (SEMH) needs.

The Special Educational Needs & Disabilities education sufficiency strategy comprises four strands, which set out the vision for how Oxfordshire County Council

will ensure sufficient education provision for children and young people with special educational needs and disabilities:

- Strand 1: Ensure that all early years providers and mainstream schools support an inclusive approach to education: all children, where possible, to be educated in their local school, receiving the support they need at the earliest stage, and providers following an inclusive approach for all children with special educational needs and disabilities.
- Strand 2: Develop the network of resource base provision across the county, setting up new resource bases in existing schools and incorporating them within new mainstream schools where appropriate.
- Strand 3: Continuing the programme of expanding the county's special schools.
- Strand 4: New Schools: two new schools specialising in SEMH and ASD are currently planned.

The Strategy is underpinned by principles to ensure “the right provision, at the right time, in the right place for every child” in each locality:

- The needs of vulnerable children and young people should be met locally wherever possible; therefore, a wide range of local provision is required to meet the diversity of needs.
- A strong equalities and early intervention focus should be promoted across all education providers.
- New provisions should promote inclusive opportunities for the most vulnerable children.
- New schools should be outward looking to support the local needs of the community, e.g. a multi-use approach throughout the year.
- Specialist provisions should be co-located or linked with mainstream provision.
- Specialist provisions should support learners in the local area, providing a range of outreach and in-reach functions.
- Children and young people access appropriate, quality assured interventions, in a timely way to improve engagement in learning and reduce the risk of exclusion from school.

Section 6 of this Pupil Place Plan provides details of the current special education provision in Oxfordshire.

Academies in Oxfordshire

As of October 2021, 98% of Oxfordshire secondary provision, 43% of primary provision and 47% of special school provision are academies. The Oxfordshire academy rate is higher than the national rate.

An academy is run by a charitable trust which is responsible for every aspect of managing the school. These trusts can be set up by a wide range of organisations including religious groups, educational specialists, employers, charities and community groups. They have greater flexibility in the way the school is run. For example, they can set staff pay and conditions; change the length of the terms and

the school day; and are not obliged to follow the National Curriculum although they must teach English, Maths and Science.

Academies are not accountable to the county council and receive their budget directly from central government. The premises are typically leased to the trust by the county council on a 125-year lease if owned by the county council, or on an alternative basis if owned by a charitable trust or other landowner.

Where the trust runs more than one school it will usually appoint a local governing body to each school. Schemes of delegated powers from the Trust Board of Directors to local governing bodies vary from trust to trust. Governors currently include a minimum of two parent governors, the headteacher and a person appointed by the trust.

The Academies Act 2010 enabled more schools to convert to academies, without always needing a sponsor. The Education Act 2011 expanded the programme to allow the establishment of 16-19 academies and alternative provision academies. In 2016 the Education and Adoption Act mandated Regional Schools Commissioners (RSC), acting on behalf of the Secretary of State for Education, to issue Academy Orders for any school judged to be inadequate by Ofsted. Local Authorities and governing bodies have been given a legal duty to facilitate this.

This legislation has a significant impact on the role of the local authority as the strategic commissioner of school places. Academies are responsible for setting their own admission number, and thus capacity and any plans for expansion, with the agreement of the RSC.

Capital funding for the basic need for new pupil places in all government-funded schools (including academies) because of local demographic changes, is allocated to local authorities according to the relative need for new places, based on forecast data provided by authorities. In deciding where to use basic need funding to provide additional places, local authorities are expected to consider fairly both their maintained schools and local academies, and where the additional places will be of greatest benefit to their children.

The Education and Adoption Act 2016 set out a continued commitment to the academies programme. In this context the county council, recognising that the diversity of educational provision in the county will continue to expand, reviewed its position on academy status. In October 2015 the county council cabinet agreed that the council should:

- Adopt a more assertive policy in identifying appropriate sponsors for schools required to convert to academy status;
- Promote appropriate groupings to form new Multi-Academy Trusts and encourage the growth of existing Multi-Academy Trusts based in the county;
- Further develop and promote the collaborative company model, both to incorporate more schools in these and to extend the scope of their pooling of resources and responsibility.

As well as supporting the conversion of schools to become academies, the county has seen the establishment of Free Schools, University Technical Colleges and Studio Schools, which are all classed as academies.

This Plan notes the schools which had converted to academy status by October 2021. More conversions may take place during the lifetime of this Plan. In this Plan, the term “school” applies both to maintained schools and academies.

Oxfordshire Education Strategy

School place planning within Oxfordshire aims to support wider council and education strategies within the county.

The *Oxfordshire County Council Corporate Plan 2020-24, Thriving communities for everyone in Oxfordshire* (www.oxfordshire.gov.uk/corporateplan) sets out Oxfordshire County Council’s vision for Oxfordshire: thriving people, thriving communities, a thriving economy.

Oxfordshire’s *Education Strategy for Oxfordshire* details a vision for an autonomous and self-improving education system, which enables schools and settings to promote excellence and lead their own improvement. This is set within the context of a well-planned continuum of provision from birth to 25 that meets the needs of children and young people in Oxfordshire.

2.3 School organisation decision-making

To inform its duties as decision maker for school organisation issues the county council has a School Organisation Stakeholder Group consisting of County and District councillors and representatives of Head Teachers’ associations, governors and Diocesan Boards of Education. From 2012, this group has incorporated the roles of the former School Admissions Forum.

The key activities of the group are to:

- Discuss overall strategic development in context of Local Authorities’ statutory duties.
- Discuss developing options relating to school organisation.
- Comment on statutory information and any written comments and objections as part of the statutory process.
- Discuss proposals submitted for Free Schools, University Technical Colleges and other academies.
- Provide advice on processes to identify sponsors for new academies which are required to meet population growth.
- Consider how well existing and proposed admissions arrangements serve the interest of children and parents within the area of the Local Authority.
- Monitor school applications and admissions patterns on an annual basis.

Making changes to maintained (non-academy) schools

The *School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013* set out the way in which decisions are made about proposals to enlarge local authority maintained (i.e. non-academy) schools or make other significant changes such as altering the age range.

In October 2018, the DfE released updated *Guidance: Making Prescribed Alterations to Maintained Schools*. The purpose of this guidance is stated as:

- to ensure that additional good quality school places can be provided quickly where they are needed - it is expected that, where possible, additional new places will only be provided at schools that have an overall Ofsted rating of 'good' or 'outstanding'.
- that local authorities and governing bodies do not take decisions that will have a negative impact on other schools in the area;
- and that changes can be implemented quickly and effectively where there is a strong case for doing so.

The legislation requires full consultation to take place, particularly with parents, staff and governors. A statutory consultation and decision-making process must be followed to make the following "prescribed alterations", whether they are proposed by the local authority or by the school governing body:

- Proposed permanent enlargement of the premises of the school, where this is both by more than 30 pupils and by at least 25% or 200 pupils (whichever is the lesser). For special schools these thresholds are 10% or 20 pupils, whichever is the lesser.
- Expansion onto a satellite site; closure of a satellite site, where the satellite is more than 1 mile from the main site; or transfer to a new site, where this is more than two miles from the current site.
- Decrease in the number of pupils in special schools (in mainstream schools, reductions in Published Admission Numbers are consulted on in accordance with the School Admissions Code).
- Change of types of need catered for by a special school.
- Establishing, removing or altering SEND provision at a mainstream school
- Closing an additional site, or transferring to a new site
- Change of age range.
- Change of category.
- Single sex school becoming co-educational, or vice versa.
- Change of boarding provision.
- Amalgamations.

For proposals to create school sixth forms:

- These are only expected to be allowed for schools which are rated as 'good' or 'outstanding' by Ofsted, with a history of positive Progress 8 scores, and where there is a genuine need for more sixth form places.
- The proposed sixth-form should provide places for a minimum of 200 students and either directly or through partnership, offer a minimum of 15 A level subjects.
- Financial viability should be demonstrated through evidence of financial resilience should student numbers fall and that the proposal will not impact negatively on 11-16 education or cross subsidisation of funding.

There are requirements to notify the DfE or Regional Schools Commissioner (RSC) of proposals considered potentially controversial:

- Involve expansion onto a separate ‘satellite’ site
- Where objections have been raised that the proposed change could potentially undermine the quality of education in the local area by creating additional places where there is surplus capacity

The statutory process was streamlined by the 2013 Regulations:

1. Publication of proposals.
2. Formal consultation – 4 weeks.
3. Decision by Cabinet Member (or Cabinet for more contentious proposals) – within 2 months of the end of the consultation period, or the decision defaults to Schools Adjudicator. In limited circumstances, there will be the right of appeal to the School Adjudicator.
4. Implementation: there is no maximum limit on the time between the publication of a proposal and its proposed date of implementation. However, proposers will be expected to show good reason (for example an authority-wide reorganisation) if they propose a timescale longer than three years.

An increase to a mainstream school’s Published Admission Number that does not require a physical enlargement to the premises of the school does not require this statutory process. An increase in pupil numbers may be achieved solely by increasing the admission number in line with the School Admissions Code.

Changes that are not counted as a “prescribed alteration” can be made by the local authority or school governing body without following a statutory process; they are nevertheless required to adhere to the usual principles of public law. They must: act rationally; take into account all relevant and no irrelevant considerations; and follow a fair procedure. Local authorities and governing bodies are expected to work together on such changes, taking into account the wider place planning context, and ensure open.

Once a decision on the change has been made, the proposer (i.e. LA or GB) is responsible for making arrangements for the necessary changes to be made to the school’s record in the government’s GIAS (Get Information About Schools) system. These changes must be made no later than the date of implementation for the change and can be input in advance, once a decision is made. Further information is available from <https://www.gov.uk/government/collections/school-organisation>.

Closing maintained (non-academy) schools

The *School Organisation (Establishment and Discontinuance of Schools) Regulations 2013* set out the way in which decisions are made about proposals to close local authority maintained schools. In November 2019, the DfE released updated guidance on *Opening and Closing Maintained Schools*. The purpose of the guidance is stated as:

- To ensure that good quality school places are provided where they are needed, and that surplus capacity is removed where necessary.

Local authorities have the power to close all categories of maintained schools. The governing body of a voluntary, foundation, or foundation special school may also publish proposals to close its own school. Decisions related to school closures are taken by the local authority following a statutory process to allow those directly affected by the proposals to feed in their comments.

Reasons for closing a maintained school include, but are not limited to, where:

- wider school reorganisation means that the school is now surplus to requirements (e.g. because there are surplus places elsewhere in the local area which can accommodate displaced pupils, and there is no predicted demand for the school in the medium or long term);
- it is to be “amalgamated” with another school (see below);
- it has been judged inadequate by Ofsted and there is no sponsored academy solution;
- it is to acquire, lose or change its religious character;
- it is no longer considered viable; or
- it is being replaced by a new school.

Where two (or more) schools are to be amalgamated, the legal process for this is to either close the schools and open a new one, or to close one (or more) of the schools and expand another to accommodate the displaced pupils. School amalgamations therefore require a statutory school closure process.

There is a presumption against closure of nursery schools and rural schools. This does not mean that such schools cannot be closed, but the case for closure should be strong and a proposal must be clearly in the best interests of educational provision in the area.

The Secretary of State may direct a local authority to close a maintained school requiring special measures (under section 68 of EIA 2006). This will usually be done only where there is no prospect of the school making sufficient improvements and where there is a sufficient supply of alternative school places in the area. Prior to making the direction, the Secretary of State must consult with the local authority, the governing body, and – in the case of a voluntary or foundation school – the diocese or other appointing authority. Such a direction will not require the publication of a statutory proposal for the school’s closure.

Under Section 17 of EIA 2006 the Secretary of State may also direct a local authority to close a community special or foundation special school if he/she considers it is in the interests of the health, safety or welfare of the pupils.

Further information is available from
<https://www.gov.uk/government/collections/school-organisation>.

Making changes to academies

New guidance on *Making significant changes to an open academy and closure by mutual agreement* was published by the government in November 2019. Much of the

guidance mirrors the non-academy guidance, and it has the same stated purpose as the guidance for non-academy schools, including the expectation that only academies that are rated as 'good' or 'outstanding' will seek to expand.

The guidance emphasises the need for compatibility with local place planning. This includes "a strong expectation that academy trusts should work collaboratively with local authorities.... on pupil places planning, taking into account the increases or decreases in pupil numbers forecast in the area, especially in areas of basic need", in order to support their local authority to provide sufficient school places for all pupils in its area. This could be through academies expanding their school premises, increasing their admission number or admitting over admission number.

Significant changes need to be approved by the Regional Schools Commissioner (RSC) and may require a full business case, or in some cases can follow a fast track route. In both cases, consultations should be undertaken for at least four weeks with all those who could be affected, and should include public and stakeholder meetings. For changes to admission arrangements, a six-week consultation period is required.

The "fast track" route only applies to academies rated as 'good' or 'outstanding' in their last inspection by Ofsted, which have a latest Progress 8 score of at least the national average, are in good financial health, have the capacity to make the change and can provide evidence that the local authority (and, if applicable, the trustees or diocese) do not object to the change. Fast track can apply to:

- Increase in the capacity of academies (with the exception of satellite expansions and expansion of UTCs/studio schools)
- Change of age range by up to two years (excluding adding or removing a sixth form, changing the age ranges of UTCs/studio schools and cases of a contentious nature).
- Adding or increasing boarding provision.

However, a full business case is specifically required for proposals which:

- Reduce places in an area of basic need;
- Have received objections from the local authority and/or neighbouring schools, trustees or the diocese that the proposed change could potentially undermine the quality of education provided by other 'good' or 'outstanding' schools in the area, by creating additional places where there is already surplus capacity;
- Have received any other objections that may increase the risk of challenge;
- Seek to set up a satellite site to the school;
- Make changes to UTCs and studio schools.

Other proposals which require a full business case are:

- Expansion of academies not rated "good" or "outstanding". Only in very limited circumstances will the RSC consider such approval, for example: where the academy is in an area of critical basic need; all other options for providing additional places have been fully explored; **and** the academy has a robust improvement plan in place.
- Adding or removing a sixth form.

- Expansion of SEN academies by at least 10% or 20 pupils (whichever is the lesser).
- Changing age range by three or more years, or making age range changes which could be considered contentious or set a precedent for schools in their local area or have a significant impact on local provision.
- Amalgamations/mergers: one school must be closed and the other enlarged.
- De-amalgamations.
- Faith-related changes.
- Transfer to another site.
- Change of gender composition.
- Change in type of SEN provision, or changes affecting provision reserved for pupils with SEN.
- Decreasing boarding provision by at least 50 pupils or 50% (whichever is the greater).

Further information is available from

<https://www.gov.uk/government/collections/school-organisation>.

Routes to opening new schools

The Education Act 2011 amended the Education and Inspections Act 2006 to change the arrangements for establishing new schools. In November 2019, the DfE released updated guidance on *Opening and Closing Maintained Schools*. The purpose of the guidance is stated as:

- To ensure that good quality school places are provided where they are needed, and that surplus capacity is removed where necessary.

Most new schools will now be established as academies, and since May 2015, all new academies are classified as free schools. There are a few limited circumstances in which the establishment of a new non-academy school can be proposed. Sections 10 and 11 of the EIA 2006 permit proposals to establish new schools under certain conditions either *with* the Secretary of State's consent (section 10 cases) or *without* (section 11 cases).

- A new community or foundation school to replace an existing maintained school (section 10);
- A new foundation or voluntary controlled school (section 10);
- A new voluntary aided school to meet demand for a specific type of place (section 11);
- A new community or foundation primary school that is to replace a maintained infant and a maintained junior school (section 11);
- A new foundation or voluntary controlled school resulting from the reorganisation of existing faith schools in an area, including an existing faith school losing or changing its religious designation (section 11);
- 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 (section 11)

- A former independent school wishing to join the maintained sector (section 11); or
- A new maintained nursery school.

Excluding these circumstances, new schools are established as academies through two routes, both of which have resulted in new schools for Oxfordshire:

- The free school presumption process requires local authorities to seek proposals to establish a free school where they have clearly identified the need for a new school in their area. These are often referred to as “presumption” schools or LA-led proposals. The local authority runs a competitive process to invite potential academy sponsors to run the new school.
- Proposers can also apply directly to the DfE to establish a free school, through time-limited application waves. These are often referred to as “wave” schools or “central route” proposals. This route may be subject to specific criteria: for mainstream schools, for example, in 2019 wave 14 was targeted at areas with both low educational standards and demonstrable basic need for additional school places, which excluded Oxfordshire. There have been no further wave processes since wave 14.

The government also runs variations of the free school process for specific types of free school. For example, in 2018, Oxfordshire was successful in submitting a bid for a new special school through a joint special and alternative provision free schools wave. There is a current DfE programme to open specialist Maths schools for 16-19 year olds in partnership with universities.

If a free school presumption competition does not yield a suitable proposal, then a statutory competition can be held under section 7 of the EIA 2006. This will not require a separate application for the Secretary of State’s approval, because the Secretary of State will inform the local authority that approval to hold a section 7 competition is given at the same time as informing the local authority that no suitable free school proposal was identified. Free school proposals and proposals for foundation, foundation special and voluntary schools can be submitted into the competition. However, the Regional Schools Commissioner (on behalf of the Secretary of State) will consider any free school proposals first when making a decision on the case. If a free school proposal is considered suitable, the competition ends and the proposer works with the department and local authority to progress its proposal. If a free school presumption proposal is not considered suitable, or none is received, the competition continues and it is for the local authority to decide whether to approve one (or more) of the maintained school proposals. Where a local authority holds a section 7 competition, the local authority must follow the statutory process set out in Schedule 2 to EIA 2006 and the Establishment and Discontinuance Regulations.

Oxfordshire’s process for opening new schools

In November 2019, the DfE published updated guidance on opening new academies, entitled *The Free School Presumption*.

Where the county council identifies the need for a new school, for example to meet the needs of housing growth, section 6A of EIA 2006 places it under a duty to seek proposals to establish a free school via the “free school presumption”. The publication, in this Pupil Place Plan, of the expected forward programme of new schools, provides academy trusts interested in opening new schools in Oxfordshire with prior notice of future opportunities. In some cases, academy sponsors may choose to submit an application through an appropriate central government wave route for a school which the county council has identified as a future need, and if such a bid is successful, any free school presumption process would be ended, or deemed not necessary.

For all new schools which do not yet have an identified sponsor, Oxfordshire County Council seeks to liaise proactively with any groups interested in applying for a free school, as well as with the DfE, to ensure that all new schools support the local authority’s statutory duty to provide sufficient school and early education places, as well as broader educational strategies and aspirations. Section 3.3 below sets out the county council’s current requirements for new schools.

The decision on all new free school proposals lies with the Secretary of State. Following a presumption process, the local authority recommends its preferred proposer to the Secretary of State, who will take this into account when choosing an academy sponsor, along with any additional factors of which the DfE is aware. The Secretary of State’s decision is delegated to the Regional Schools Commissioner (RSC) for the area in which the school will be located.

Within Oxfordshire, the presumption process for identifying preferred providers for new academies is:

- i. Undertake public consultation to decide the academy model to be implemented and finalise the education specification for the new academy, based on the model specification template, and to be approved by the Cabinet Member for Education & Cultural Services. Undertake an impact assessment for submission to the DfE. Notify the DfE that applications will be sought, including sending specification.
- ii. Invite initial expressions of interest (EoI) in running the school through the OCC website, as well as through direct notification of known interested parties and through such mechanisms as facilitated by the DfE. All EoIs must be submitted to the DfE who will advise of potential issues.
- iii. Assess expressions of interest against the specification and the criteria in current DfE guidance.
- iv. Invite detailed bids, usually from three or fewer providers. When received, submit to the DfE, allowing at least 4 weeks for the DfE to provide written feedback on the capacity, capability and recent performance of each proposer, before the assessment panel.
- v. Assessment panel to include a presentation from each shortlisted bidder, and agreement of assessment against criteria. Cabinet Member to approve choice of recommended sponsor. Submit recommendation and assessments, including scoring of the proposals, to the Regional Schools Commissioner, as representative of the Secretary of State.

- vi. Await RSC decision before making any public announcement. DfE notifies successful proposer, LA and local MP; LA notifies other parties.
- vii. LA and selected sponsor develop proposal to allow a funding agreement to be approved by Secretary of State.
- viii. Should the process not identify a satisfactory sponsor at the first attempt, at the discretion of the Lead Member for Education the process could be rerun from the detailed bid stage (d) rather than beginning again with Expressions of Interest.

Further information is available from

<https://www.gov.uk/government/collections/school-organisation>.

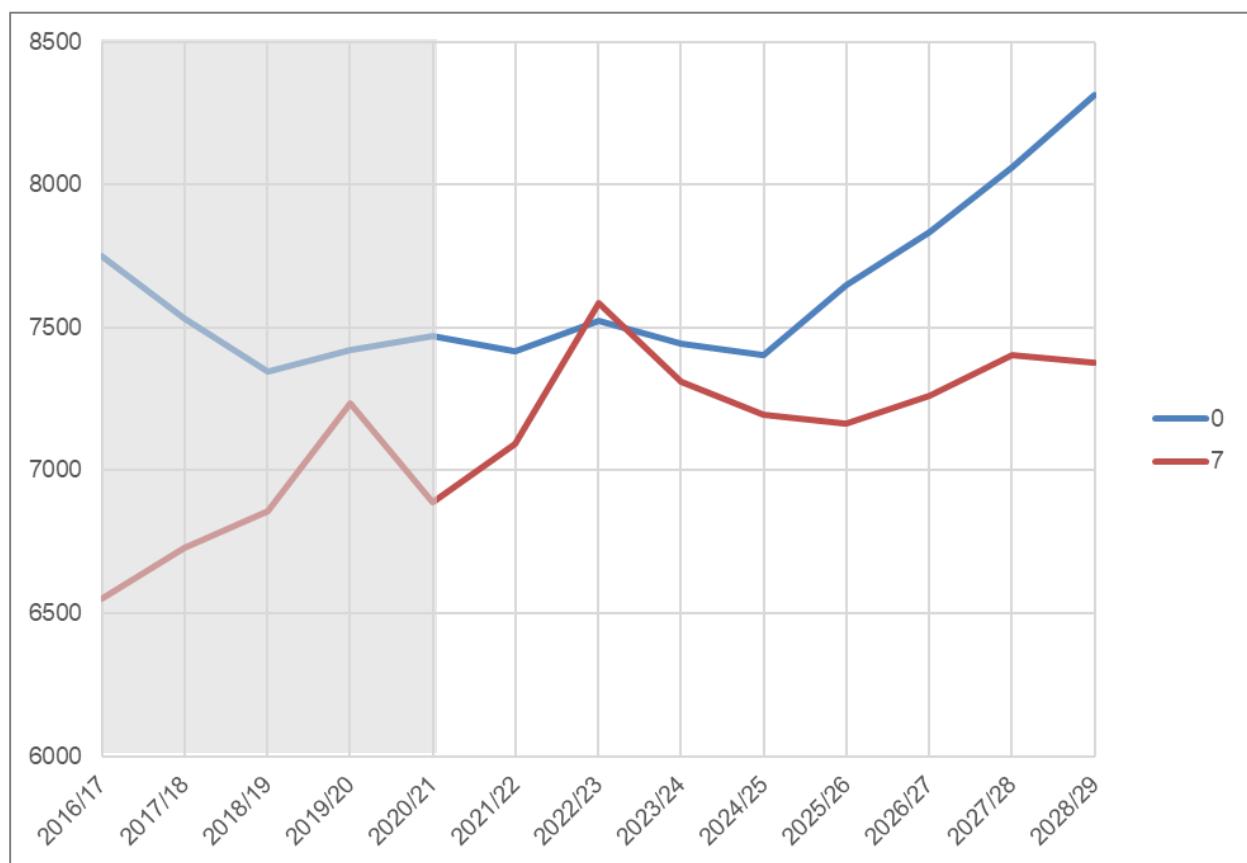
The establishment of a separate new school will not always be the most appropriate solution to increasing capacity. Before embarking on a new school process, the council will explore whether expanding existing school(s) would be a more sustainable solution. In some cases this may involve relocating an existing school onto a larger site to enable it to expand, or establishing a satellite to an existing school, thereby expanding it onto a split site. Such a solution would usually require a statutory approval process (non-academies) or Regional Schools Commissioner approval (academies) as detailed above.

3. PLANNING FOR GROWTH

After rapid growth in the early part of the last decade, demand for Reception places (Year 0 in the graph below) subsided in the second half of the decade, and is now forecast to remain level overall until growth resumes in the second half of this decade. However, in areas of housing growth demand is still growing.

Demand for secondary school places (as indicated by Year 7 in the graph below) has been growing strongly in recent years, as the earlier births boom matured. This will result in a particular peak in 2022, after which there is except to be a temporary lull, until growth resumes later in the decade. Again, this pattern is not consistent across the county.

Recent and forecast Reception (Year 0) and Year 7 pupils in Oxfordshire's schools



The number of primary pupils on roll at Oxfordshire's mainstream schools fell by 0.2% between the academic years 2018/19 and 2019/20, and rose by 0.4% between 2019/20 and 2020/21. This reflects the slowdown of growth experienced in recent years as a result of the falling birth rate. Reception numbers, which had been falling, increased by 1% between academic years 2018/19 and 2019/20, and again by 0.8% between 2019/20 and 2020/21 – this recovery was anticipated as a result of large-scale housing development underway and planned across the county.

Year 7 numbers grew by 5.4% from 2018/19 to 2019/20, but fell by 4.3% from 2019/20 to 2020/21. This fall was largely a result of a smaller than usual secondary transfer cohort from 2019/20 to 2020/21 and is not a sustained trend; it is expected that demand for secondary school places will continue to rise as the increased birth

rate feeds through. Total secondary pupil numbers are continuing to grow strongly – by 2.8% between the academic years 2018/19 and 2019/20 and by 2.6% between 2019/20 and 2020/21 – as the higher numbers in primary schools are now feeding through to secondary schools.

Our current pupil projections show a 1.2% increase in primary pupil numbers and for secondary school pupils a 7.8% predicted rise between 2020/21 and 2025/26. Longer term, there is expected to be significant further growth due to the high levels of housing growth planned for the county.

Approximately 1% of the total primary school population and 2% of the total secondary school population attends special schools; therefore, there is a broad correlation between special school pupil numbers and mainstream pupil numbers. The special school population is growing, and there has been particularly rapid growth in pupils attending non-county special schools.

Forecasting for special educational provision is more complicated than for mainstream schools. The number of pupils with Education, Health & Care Plans (EHCPs) has grown significantly faster than the overall population at both the Oxfordshire and national level. Nationally and locally there has been an increased dependence on independent and non-maintained schools due to a shortage of suitable maintained school places. Pupil numbers in Oxfordshire's maintained special schools therefore depend not only on population changes, but also on changes in SEND policy and the availability of places, and will be affected by the actions planned under the SEND Sufficiency Strategy.

3.1 Factors affecting demand for school places

Future demand for places is considered below in the context of six main factors: fertility and birth rates; migration; housing growth; troop movements in and out of the county; changes in the pattern of participation in state sector education; and cross-boundary movement.

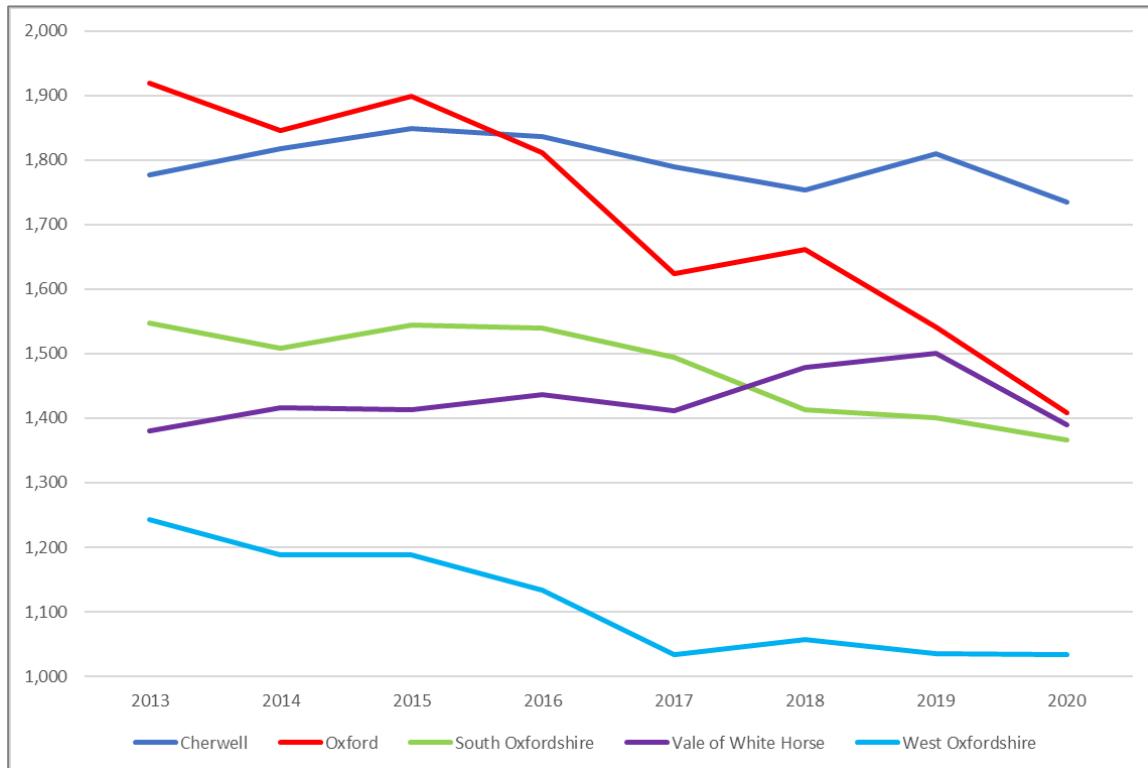
Factors affecting the demand for school places generally also affect demand for early education and childcare places. In addition, the entitlement to free early education for children aged 2 is targeted at the most disadvantaged children. The main eligibility criterion is the family's economic circumstances, so it can be expected that there will be some fluctuations in the number of eligible children, reflecting the general economic climate and the employment market. There may also be changes in government policy which affect demand for places, for example the extension of free early education entitlement.

Fertility and birth rates

Following a decade of rising births, culminating in a particularly large cohort starting primary school in September 2015 (and reaching secondary school in 2022) there has since been an overall fall in births in Oxfordshire. However, the pattern is not consistent either between districts or at a smaller scale: differences between MSOAs and across towns suggest that the divergence of birth rates is likely to be related to large-scale housing development in some areas attracting young families.

This divergence of births has resulted in very different pressures across the county, with some areas still seeing rising demand for primary school places and others seeing sharp falls.

Births by district 2013-2020



Migration

In addition to changes in birth numbers, some parts of the county experience significant internal and international migration effects, increasing volatility in school populations.

Over the ten years to 2018, there was a net international inflow of population into Oxfordshire, over two thirds of which was into Oxford city. For internal (within UK) migration, there was a net movement out of Oxford, and until 2016 Cherwell, and a net inflow to South Oxfordshire, West Oxfordshire and Vale of White Horse. Net migration into Cherwell and Vale of White Horse rose markedly in the last two years, which correlates with where the bulk of new housing has been over that time period. In general, there is a pattern of families moving out of Oxford city into surrounding districts.

Inward migration of pupils not only adds to the pressure at the normal point of school admission, but also for “in-year” transfers to local schools. In previous years when there were some spare places in schools, these in-year applications could be accommodated, but increasingly families moving into a new area are finding that the nearest school has no available places.

Migration effects are difficult to forecast. The Office for National Statistics publishes regular updates on national and local area migration, but the survey methodology used has changed several times and the 2011 Census revealed estimates of international migration were significant underestimates.

Troop movements in and out of the county

Census data show that in 2011 there were an estimated 5,840 members of the Armed Forces resident in Oxfordshire, and 2,824 “associated residents” between the ages of 0 to 15 years. A sizable portion of Oxfordshire school children are therefore from Armed Forces families. The highest concentration is in the Vale of White Horse, where an estimated 5% of 0-15 year olds are from Armed Forces families.

Troop movements can have significant effects on pupil numbers in several areas within Oxfordshire, particularly around Carterton, Bicester, Abingdon and Didcot. The impact can also be felt more widely, for example with the relocation of personnel from RAF Lyneham to RAF Brize Norton, where, due to insufficient military accommodation being available in Carterton, families were dispersed over a wider area, causing pressure on school places in towns such as Faringdon and Watchfield. The county council continues to liaise with the Ministry of Defence (MoD) in relation to future troop movements in the county

Housing growth

Oxfordshire’s component councils are working together to deliver approximately 100,000 new homes across the county between 2011 and 2031 to address the severe housing shortage and expected economic growth. Oxfordshire comprises 5 districts, and their current Local Plan status is summarised below. For each planning area, the relevant district(s) are identified.

Oxford City Council adopted its Oxford Local Plan 2036, in June 2020; this aims for around 11,000 homes in the city to 2036. The Local Plan sets a capacity-based housing requirement of 475 homes per annum from 2016/17 to 2020/21, increasing to 567 homes per annum from 2021/22 to 2035/36. This delivery target would not fully meet the objectively addressed need for Oxford, and the surrounding districts are committed to delivering additional housing growth to meet Oxford’s unmet need.

The **Cherwell** Local Plan 2011-2031 was adopted in July 2015. The Plan focuses most housing growth on the large towns of Bicester and Banbury, and a strategic development site at Heyford. The Cherwell Local Plan 2011-2031 (Part 1) Partial Review has also been adopted, containing specific development proposals to deliver 4,400 additional homes as its contribution towards addressing Oxford’s Unmet Need, across sites at North Oxford, Kidlington and Begbroke/Yarnton.

South Oxfordshire District Council (SODC) adopted its Local Plan 2034 in December 2020. This builds on the previous Core Strategy, which concentrated planned housing growth on Didcot, Thame, Wallingford and Henley, and also allocated 1,154 homes across 13 larger villages. The new Local Plan makes provision for 26,783 homes between 2011 and 2034, including a further seven strategic housing sites and increased housing numbers in some town and village locations.

The **Vale of White Horse** (VoWH) Local Plan 2031: Part 1 was adopted in December 2016 and sets a strategic policy framework for the district for the plan period up to 2031. The Part 1 plan makes provision for ‘at least’ 20,560 homes, delivery of which has accelerated rapidly over recent years, with over 1,600 completions in 2018. In October 2019, the council voted to adopt their Local Plan

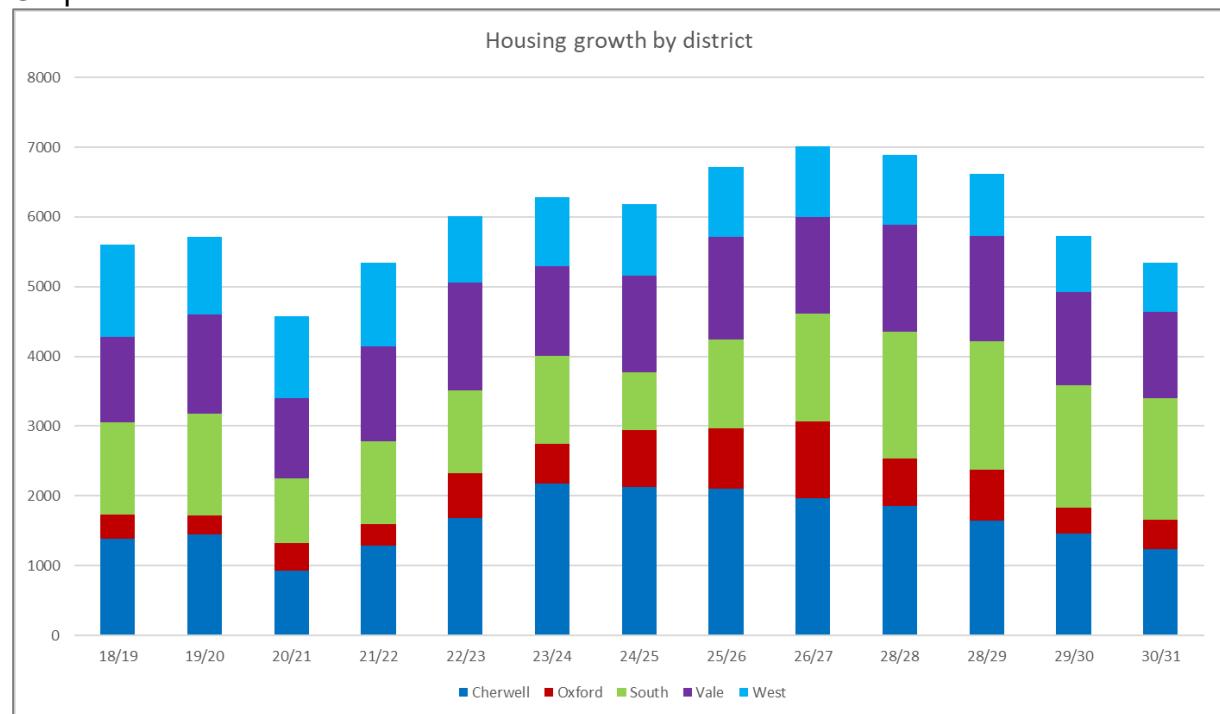
Part 2, which increases the housing requirement (2011-2031) to 22,760 homes, to include 2,200 as its contribution towards addressing Oxford's Unmet Need.

The **West Oxfordshire** Local Plan 2031 was adopted by the Council in September 2018. It identifies a need for 15,950 new homes in West Oxfordshire in the period 2011 – 2031, including 2,750 as a contribution towards Oxford's unmet housing need. The plan focuses most housing growth on Witney, Carterton, Chipping Norton and Eynsham, with smaller scale growth at Woodstock and smaller towns/villages.

There are a number of new schools and school expansions planned to support the anticipated growth in the residential population which are referred to in this document. The county council continues to work closely with the district planning authorities to identify the impact on school places of the housing growth planned.

Planned housing delivery by district

Graph



Changes in the pattern of participation in state school education

The statutory age of participation in education increased to 17 from 2013 and to 18 years from 2015. The requirement is that all young people remain in education or employment with training up to the age of 18. This has resulted in some increase in pupils staying at school post-16, and has been particularly noticeable in the SEND sector.

Economic conditions can also affect the percentage of children educated in the state sector rather than independent schools. This appears to affect some schools more than others, in particular, small village schools in affluent areas.

Cross-boundary movement

Oxfordshire schools do not operate in isolation. Some Oxfordshire residents choose schools outside the county, and some non-Oxfordshire residents choose Oxfordshire

schools. In some cases, this is because their nearest school is in a different county, and some secondary schools formally meet the needs of non-Oxfordshire families either through having non-Oxfordshire partner primary schools, or having designated areas which extend into other counties. In other cases, cross-boundary movement will be as a result of school preferences, including for selective/non-selective schools, faith schools, or other specialisms.

At **primary** level, imports and exports of pupils broadly balance. Most inward net movement of pupils is from Reading (adjoining Henley & Sonning Common planning areas) and most outward net movement is to Northamptonshire (adjoining Bicester, Banbury and Bloxham planning areas). Other areas which can be affected by net inward movement are: Banbury, Bloxham & Chipping Norton planning areas where there is movement of pupils from Warwickshire; and Faringdon planning area where there is movement of pupils from Swindon. Other areas which can be affected by net outward movement are: Bicester, Wheatley and Thame planning areas where there is movement of pupils to Buckinghamshire; and Chipping Norton, Burford and Faringdon planning areas where there is movement of pupils to Gloucestershire.

At **secondary** level, Oxfordshire is a net importer to the extent of around 1.6% of the school population. Most inward net movement of pupils is from Buckinghamshire (adjoining Bicester, Wheatley and Thame planning areas, mostly affecting Lord William's School in Thame), which is largely related to selective education in Buckinghamshire, and from Reading (adjoining Henley & Sonning Common planning areas), mostly related to a shortage of secondary school places in north Reading. There are also smaller net inflows from W Berks (adjoining Faringdon, Wantage, Didcot, Wallingford, Woodcote and Sonning Common planning areas) and Swindon (adjoining Faringdon planning area). Most outward net movement is to Northants from the NE of Oxon (adjoining Bicester, Banbury and Bloxham planning areas); to Warwickshire (adjoining Banbury, Bloxham & Chipping Norton planning areas); and to Gloucestershire (adjoining Chipping Norton, Burford and Faringdon planning areas).

For special education, Oxfordshire is also a net importer of pupils to the extent of around 1.3% of the special school population.

3.2 School forecast methodology

Purpose

The purpose of forecasting pupil numbers is to satisfy statutory obligations to meet Basic Need (demand for additional school places) and to assess the extent to which a surplus or deficit of places is likely to exist throughout the county in the future.

Pupil numbers in Oxfordshire schools are closely monitored. Schools are required to complete a return for the Department for Education (DfE) each October which gives a comprehensive description of numbers of pupils on roll: the School Census. This is followed up by further, shorter returns in spring and summer.

Detailed pupil forecasts are published in this Plan at the learning community level in the Annex. Pupil forecasts for primary and secondary schools are submitted to the DfE each summer for the purposes of informing Basic Need funding allocations.

The DfE does not require forecasts for special schools or nursery schools. Oxfordshire estimates future demand for special school places for the purposes of informing capital planning. No forecasts are currently prepared specifically for nursery schools, but demographic forecasts and other data sources are used to monitor expected demand for early education places.

Forecasts are updated annually, and are based on School Census data, population forecasts (which include planned housing development) and recent patterns of parental choice. The primary school forecasts produced are currently projections of pupil numbers as of September each school year – not all Reception children will have started school by then, so numbers may eventually rise. (Although places are offered to all children from the autumn term after their fourth birthday, parents are entitled to defer their child's entry until later in the year). The secondary school forecasts are also projections of pupil numbers as of September each year.

The forecasts show the expected demand for places in each area. There are circumstances where forecast demand cannot be met within that area, for example:

- Schools within that area may not be physically capable of expansion.
- More cost-effective solutions for meeting the additional demand for places, including through expanding capacity, may be available at nearby schools in neighbouring areas.
- Schools which are their own admissions authorities, such as VA schools and academies, cannot be required by the local authority to expand.

In some cases, therefore, the supply of school places to meet forecast demand may eventually be through schools in other areas.

Methodology

The pupil forecasting model is summarised as follows.

Step 1 - Moving on:

The model uses recent trends to split pupils at each school into three categories:

1. Numbers estimated to stay at the same school (moving up a year).
2. Numbers estimated to move to a different Oxfordshire school: this is largest for the main transfer points (e.g. primary to secondary for year 6 into year 7) but past patterns of pupil movement between schools in other year groups are projected forwards.
3. Numbers estimated to leave the OCC system: the main reasons are school leavers in year 11 and 13, people moving out of county, changing to home schooling, or going to private schools.

Step 2 - Ageing on:

Pupils are then aged on into the next year group.

Step 3 - Other OCC:

This step adds in the number of people who are moving into this school from another Oxfordshire state school, i.e. the reflection of category 2 in the "Moving on" stage.

Step 4 - New into system:

Based on the average of last 4 years of the school census, this adds in an estimation of pupils new to Oxfordshire schools. The main reasons for this are:

- Reception years as all are new to the state system.
- Pupils coming in from out of county including overflows from neighbouring councils.
- Pupils coming in from private or home schooling.

Step 5 - Population changes:

Having moved on and redistributed the existing population, pupil numbers are then adjusted in line with forecast population changes, based on the Oxfordshire county council housing-led population forecasts. The main sources for these forecasts are the ONS mid-year estimates and population forecasts. These forecasts include the impact of new housing builds, as informed by each of the five district/city council five-year land supply housing plans.

The final forecasts will present a set of pupil figures which runs in line with the background population forecast for the county and which uses recent intake patterns. Where new schools are planned, population growth is allocated to existing schools until the point of opening any new establishments. Individual school forecasts can therefore be distorted where there is due to be a new school, but the planning area forecast should correctly reflect the expected impact of new housing.

This methodology does not involve matching population type to specific housing type built, since local plans only forecast total housing supply (not type). When individual housing development proposals are assessed, housing type is considered, as detailed below.

A number of situations can complicate the forecasting process:

- Housing development – see below.
- A school may suddenly gain or lose in popularity because of a change in circumstances at the school or in its surrounding area. Sometimes these changes can be seen before they occur but this is not always possible.
- The number of pupils in schools associated with MoD establishments is always difficult to predict because of the movement of regiments and squadrons. Often planned movements can be delayed and there can be uncertainty over the numbers of children involved.
- Migration is a further unpredictable factor and often manifests as unpredicted fluctuations in demographic projections.
- Changes in legislation for which demand cannot be objectively calculated, for example, the rise in age of participation in education or training.

Housing development and pupil forecasting

The forecasts shown in this Plan should be treated only as a first estimate for the purposes of identifying the impact of new housing. The demographic forecasts underlying the pupil forecasts are based on district planning authorities' expectations of housing development. There is good liaison between the county council and planning departments of district councils; however, changes in economic climate and other issues can result in developers changing the rate and type of build at short notice which is difficult to predict and track. Moreover, data on housing projections at this level does not always include a breakdown of the type and size of houses, and therefore the methodology does not involve matching population type to specific housing type built.

In cases of significant housing development Oxfordshire uses its PopCal tool to produce specific population profiles based on the proposed type and timing of housing.

The PopCal tool was developed by Oxfordshire County Council based on data from past housing developments within each district council, and has been validated by the Oxfordshire Data Observatory. It was updated in 2021 to use data from the 2018 survey of new housing (including age profile and occupancy rates). The profile is created from a series of parameters about the development including:

1. location of the development (by district council area)
2. total number of dwellings
3. number of dwellings by size (number of bedrooms)
4. number of dwellings by tenure (market or affordable)
5. expected phasing (number of dwellings completed (and assumed occupied) for each year of the development).

The population calculator uses this population profile to estimate the number of people at the development falling within various age ranges, which in turn is used to assess the quantum of demand on infrastructure and services, including the number of children likely to need places in local authority maintained schools.

3.3 Expansion of school capacity

Where applications for school places exceed the combined admission numbers of schools in that area, then additional school places need to be provided. If the shortage of places is expected to be temporary, it may be sufficient for one or more schools to admit above their usual admission number into “bulge” classes – either using existing accommodation or in temporary accommodation. If the shortage of places is forecast to be sustained, a permanent expansion of capacity will be required, either through new schools or expansions of existing schools.

New schools are likely to be more appropriate where there is a localised and relatively predictable, permanent and large-scale increase in demand, for example within major housing developments. Where the increase in demand is more dispersed, for example a general underlying increase in the population, expansions of existing schools are likely to be more appropriate. However, the needs of each planning area are assessed and reviewed individually, and before any new school process is started, the potential for sufficient capacity to be provided through expansion of existing schools will be explored.

Expansion of existing schools

In many cases, expanding existing schools can create additional capacity more quickly than building new schools, and at a lower cost. Extensions of existing schools can also provide opportunities to provide added value through addressing existing accommodation issues and increasing the financial sustainability of schools.

When choosing which school should expand, a number of decision-making criteria will be considered, including:

- Popularity: the county council seeks to ensure a high percentage of parents can secure a place at their first preference school.
- Location: to allow the option of children walking or cycling to school, it is preferable for children to be able to attend a school no more than 2 miles (for infant children) or 3 miles (for older children) from home.
- Quality of provision: expansion of successful, high attaining schools supports the council's commitment to improving educational outcomes, and is in line with DfE expectations.
- Effective organisation of schools: where possible, expansion which moves schools towards being able to teach in single age classes is preferred.
- Choice and diversity: church schools and academies are considered equally with local authority maintained schools for expansion.
- Existing accommodation and site area: in some cases, a school's existing accommodation may already support a higher number of pupils (for example, it may have a large hall, or a large total site area).
- Feasibility of expansion: the cost of expanding a school will be affected by their current layout of accommodation.

In some cases, in order to expand a school it may be necessary to relocate it onto a larger site, either in entirety or by establishing a satellite site. Reorganisation of school structures may also be necessary to support a sustainable expansion, for example restructuring from infant and junior schools to primary schools, or extending the age range of an existing school to become an all-through school.

Local consultation will inform the decision to expand a school. Section 2.3 above sets out the decision-making processes for expanding existing schools.

New schools

In areas of significant population growth, usually related to large scale housing development, new schools may be a more appropriate method of increasing school capacity than school expansions. Section 2.3 above sets out the decision-making processes for establishing new schools.

Since 2013 Oxfordshire has seen the opening of a new SEND school in Oxford; two studio schools (one since merged with its collocated secondary school) and a UTC; two all-age schools (one bilingual); three secondary schools and eight primary schools. These mark the start of a prolonged programme of new schools planned for Oxfordshire, opening either through the LA presumption route or through "wave" bids directly to the DfE.

Schools currently planned as a result of adopted Local Plans or other confirmed growth (in each case subject to the final approval of the Secretary of State) are shown in the table below. Other new schools may also be approved by the DfE, in addition to, or instead of, those shown below, in response to "wave" applications (see Section 2.3 above).

In some cases below, further assessment may identify that an expansion of an existing school, perhaps through a relocation or a satellite site, may be a more sustainable and viable solution than establishing a separate new school.

New schools expected within the time period covered by this Pupil Place Plan (to 2025)

These schools relate to the need for school places generated by already permitted housing developments, or other confirmed demographic pressures. The exact opening date cannot yet be confirmed, as it will be dependent on the progress of the necessary planning permissions, as well as the speed of delivery of any host housing developments.

Location	Type of school	Planned opening date	Sponsor
Bloxham Grove Academy	100-place special free school, 7-19	2023	The Gallery Trust
Graven Hill, Bicester	2 form entry primary school, 2-11, being built by housing developer	2023	The Warriner Trust
Grove Airfield	All-through 2-16 free school with 2 form entry primary and 4 form entry secondary	2023 for the primary phase and 2024 for the secondary phase	Vale Academy Trust
Didcot North East	Two 2-form entry primary schools with nursery classes and a secondary school	First primary school expected 2023; secondary school expected to be needed by mid/late 2020s	Academy sponsor process for the first school running 2021-2022.
South of Oxfordshire – exact location to be confirmed	100-place special free school, 7-19	2023 or 2024	The Gallery Trust
North Abingdon	Up to 2-form entry primary school with nursery classes	Housing dependent, not expected before 2025	To be decided
East Carterton	1-form entry primary school with nursery classes	Housing dependent, not expected before 2025	To be decided
Banbury, Salt Way	2-form entry (or larger) primary school with nursery classes	Housing dependent, not expected before 2025	To be decided
Didcot Valley Park	Two 2-form entry primary schools with nursery classes	Housing dependent, not expected before 2025	To be decided

New schools expected in the longer term

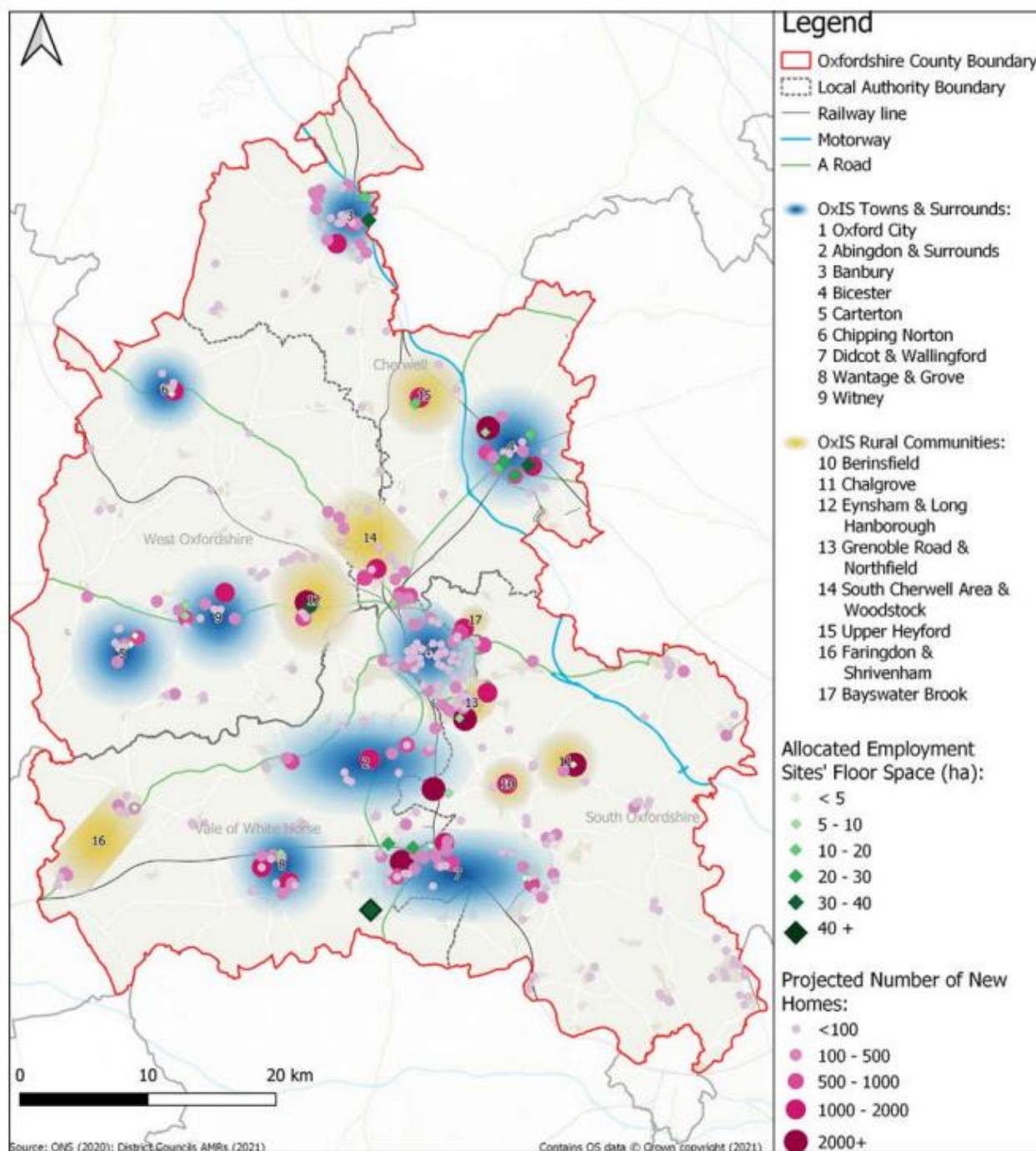
In most cases the potential new schools below relate to housing developments not yet fully permitted, and there is, therefore, a greater degree of uncertainty over the scale and timing of need.

Location	Type of school	Planned opening date	Sponsor
Eynsham	2 primary schools with nursery classes, size dependent on population growth, and a secondary school	Housing dependent, not expected before mid/late 2020s	To be decided: Eynsham Partnership Academy has submitted a case to the RSC to run at least part of the provision as a satellite expansion of Bartholomew School
South East Bicester	2-form entry primary school with nursery classes	Housing dependent, not expected before mid/late 2020s	To be decided
North West Bicester	2 or 3 more primary schools with nursery classes, dependent on housing growth, and a secondary school	Housing dependent, not expected before late 2020s	To be decided
Banbury	Secondary school, size dependent on population growth	Housing dependent, not expected before late 2020s	To be decided
Grove Airfield	2-form entry primary school with nursery classes (in addition to the all-through school above)	Housing dependent, not expected before late 2020s	To be decided
Didcot North West Valley Park	One primary school with nursery classes, size dependent on population growth	Housing dependent, not expected before late 2020s.	To be decided
Witney – north/east	1 primary school with nursery classes, size dependent on population growth	Housing dependent, not expected before late 2020s	To be decided

Chipping Norton	1 primary school with nursery classes, size dependent on population growth	Housing dependent, not expected before late 2020s	To be decided
Kingston Bagpuize/Southmoor	1 primary school with nursery classes	Housing dependent, not expected before late 2020s	To be decided
Cherwell Local Plan site: Begbroke	1 or 2 primary schools, with nursery classes, and a secondary school	Housing dependent, not expected before late 2020s	To be decided
Cherwell Local Plan site: North of Oxford	1 primary school with nursery classes	Housing dependent, not expected before late 2020s	To be decided
VOWH Local Plan site: Dalton Barracks (near Abingdon)	1 primary schools with nursery classes in the first instance	Housing dependent, not expected before late 2020s	To be decided
SODC Local Plan site: Culham	2 primary schools with nursery classes and a secondary school	Housing dependent, not expected before late 2020s	To be decided
SODC Local Plan site: Berinsfield	1 primary school with nursery classes	Housing dependent, not expected before late 2020s	To be decided
SODC Local Plan site: Chalgrove Airfield	2 primary schools with nursery classes. The Acer Academy Trust has been granted outline RSC approval to run the necessary new secondary provision as a relocation and expansion of Icknield Community College	Housing dependent, not expected before late 2020s	To be decided
SODC Local Plan site: Grenoble Road	1 primary school with nursery classes	Housing dependent, not expected before late 2020s	To be decided
SODC Local Plan site: Northfield	1 primary school with nursery classes	Housing dependent, not expected before late 2020s	To be decided
SODC Local Plan site: Bayswater Brook	1 primary school with nursery classes	Housing dependent, not expected before late 2020s	To be decided

Major planned growth areas in Oxfordshire

The main areas of planned housing growth across Oxfordshire are shown in the map below, taken from the Oxfordshire Infrastructure Strategy (OxIS) at oxfordshireopenthought.org, which provides a long-term framework for Oxfordshire to identify the priorities for investing in our strategic infrastructure.



3.4 Funding of school growth

The county council aims to join up different funding streams for schools to ensure effective and efficient use of resources.

Government funding

Government funding for school places is mainly through annual “Basic Need” allocations. These are based on data collected from local authorities in the annual School Capacity Survey (SCAP). This collects information on the capacities of schools in each planning area (as shown in this Plan), and local authorities’ forecasts of pupil numbers for several years ahead. Special schools are not included in the calculations, although local authorities are able to spend the funding on special schools.

Basic Need funding is allocated on the basis of a comparison of forecast mainstream pupil numbers with mainstream school capacity in each planning area, with shortfalls in capacity attracting funding. Adjustments are made to account for school places for which central government funding has already been provided, including through free schools, or which will be funded from developer contributions, where they are not yet fully reflected by the data collected through SCAP.

In the latest round of allocations, announced in February 2021, for the 3-year period 2020/21 to 2022/23, Oxfordshire was allocated £3,411,477 in Basic Need funding.

Although there is no similar regular funding stream for special school places, for the period 2018/19-2020/21 the government made annual funding allocations to local authorities to make capital investments in provision for pupils with special educational needs and disabilities through a “Special provision fund”. The total allocated to Oxfordshire through this fund was £4,166,884. This was followed in 2021 by a High Needs Provision Capital Allocations funding stream, through which Oxfordshire has been allocated a further £3,520,938 for 2021/22. The funding mechanism and amounts for 2022/23 or beyond have not yet been confirmed

Academies can also submit bids to the DfE Condition Improvement Fund (CIF). This is an annual bidding round for eligible academies and sixth-form colleges to apply for capital funding. The priority for the fund is to address significant condition need, keeping academy and sixth-form college buildings safe and in good working order. This includes funding projects to address health and safety issues, building compliance and poor building condition. CIF also supports a small proportion of expansion projects. These are for academies and sixth-form colleges rated good or outstanding by Ofsted that can demonstrate a need to expand.

New academies created through applications directly to the DfE – “wave” free schools - can be an important contribution towards ensuring sufficient school places. Their capital costs are separately funded by the DfE, but this funding would be expected to result in reduced Basic Need funding in the longer term, as a result of the additional capacity they provide. Where they are to meet the needs of housing development, developers are expected to contribute towards their cost.

Housing development and funding for school places

Updated guidance on *Securing developer contributions for education* was published by the government in November 2019. This sets out a clear expectation that local authorities should seek developer contributions towards school places that are created to meet the need arising from housing development. Central government basic need grant, the DfE free schools programme and other capital funding do not negate housing developers’ responsibility to mitigate the impact of their development

on education. When the DfE free schools programme is delivering a new school for a development, the DfE expects the developer to make an appropriate contribution to the cost of the project, allowing DfE to secure the school site on a peppercorn basis and make use of developer contributions towards construction. There should be an initial assumption that both land and funding for construction will be provided for new schools planned within housing developments.

Oxfordshire's Access to Learning team is consulted on all significant housing developments, and advises on the likely impact on local schools, and the measures which would be required from developers in mitigation. Typically, this will include seeking financial contributions towards the cost of expanding local schools, if there are not expected to be sufficient places available.

New residential development is also expected to increase demand for early education places. Developer contributions will be sought towards increasing capacity in the early education market, either through expanding existing provision or through new facilities. Where larger developments are required to provide new primary schools, it is expected that these schools will include nursery classes for the 2-4 age range. It may also be necessary for large housing developments to incorporate into any community facilities provided accommodation suitable for delivery of additional early education and childcare by the private, voluntary or independent sector.

There are now two types of developer contributions relevant to school capacity - Section 106 (S106) contributions and the Community Infrastructure Levy (CIL).

S106 contributions are subject to legal restrictions under the Community Infrastructure Levy Regulations 2010, and can only be required if they are:

- necessary to make the development acceptable in planning terms;
- directly related to the development;
- fairly and reasonably related in scale and kind to the development.

Contributions cannot be required if, even with the development, there would still be spare school places. Developers cannot be required to pay for improvements which are not related to their development. From September 2019, the "pooling limit" of a maximum of five S106 agreements towards each infrastructure project has been lifted, allowing the cost of infrastructure to be spread across more developments.

S106 contributions are paid directly to the county council to enable it to meet its statutory duty to secure sufficient school and early years places. The county council, working with local schools and providers, will identify the most appropriate way to increase capacity to meet the needs of the development.

The Community Infrastructure Levy is also operational in Oxford City, South Oxfordshire and Vale of White Horse, and may be introduced in the other districts in due course. Under the CIL, charges are set by the district council, based on the size and type of the new development. The money raised from the community infrastructure levy can be used to support development by funding infrastructure that the council, local community and neighbourhoods want, like new or safer road schemes, park improvements or a new health centre. The precise details of how CIL works in each area are determined by the relevant district councils. The county council works closely with each district council to identify the school infrastructure required as a result of development, and how it can best be funded.

The operation of CIL has been amended by regulation 11 of The Community Infrastructure Levy (Amendment) (England) (No. 2) Regulations 2019, which omits regulation 123 of the Community Infrastructure Levy Regulations 2010 so there is now no legislative restriction on planning obligations being sought towards infrastructure and projects that are on a Planning Authority's Regulation 123 List. The practical effect of this is that, even if a CIL authority lists education as one of the types of infrastructure on which CIL can be spent, it is now possible to also seek a S106 contribution where the three "CIL tests" are met, and it is the county council's expectation to seek such funding for additional school capacity where this is necessary to meet the needs of housing development.

Full details of how developer funding is sought towards education provision are available in the [Guide to developer contributions](#) available on the OCC website.

4. SCHOOL PLACE PLANNING DATA

This section of the plan indicates the following information for each school planning area:

- The area's context for school planning, its issues and current strategies for ensuring sufficient school places.
- The schools in each area, their capacities and pupil numbers as of May 2021.

The school place planning data is set out in this document following the alphabetical order of school planning areas as listed below.

- **Abingdon**
- **Banbury**
- **Bicester**
- **Bloxham**
- **Burford**
- **Carterton**
- **Chipping Norton**
- **Cumnor**
- **Didcot**
- **Eynsham**
- **Faringdon**
- **Henley**
- **Kidlington**
- **Oxford**
- **Sonning Common**
- **Thame**
- **Wallingford**
- **Wantage**
- **Watlington**
- **Wheatley**
- **Witney**
- **Woodcote**
- **Woodstock**

Glossary

TERM	DEFINITION
School code	Also known as the “DfE number” this is a number unique to each school and is used for identification purposes. [Where schools are referred to in the strategy sections, the code is shown in square brackets.]
Type of school	
COM	Community: the local authority owns the school’s land and buildings, funds the school and employs the staff, but the governing body is responsible for running the school.
VC	Voluntary Controlled: mainly religious or “faith” schools. Some/all of the land and buildings are usually owned by a charitable trust, which also appoints some members of the governing body, but the local authority funds the school and employs the staff.
VA	Voluntary Aided: mainly religious or “faith” schools. The land and buildings are usually owned by a charitable trust. Capital works are funded by the Diocesan Board of Education. The governing body employs the staff and sets the admissions criteria.
ACA	Academy: Academies are publicly-funded independent schools, operating outside the local authority framework, accountable directly to the Secretary of State. The Pupil Place Plan may not hold all the information for Academies that it does for other types of school, as Academies are not obliged to provide this for the county council. Schools can choose to convert to academies at any time of the year, and more schools may have converted since the publication of this Plan. This plan includes data as at November 2021; it will not show schools still at the informal consultation stage.
Free School	The term “free school” was initially used for non-profit making, independent, state-funded academies set up since 2010 by a wide range of proposers – including charities, universities, businesses, educational groups, visionary teachers or committed parents - in response to demand within a local area for a greater variety of schools, but outside of local authority school planning processes. Since May 2015, “free school” has broadened to become the DfE’s term for any new provision academy, including those resulting from the local authority-led “presumption” process. To reflect this change, free schools are now shown as “ACA” in this plan.
STU	Studio school: Small schools for 300 students. With year-round opening and a 9-5 working day, they feel more like a workplace than a school. Working closely with local employers, Studio Schools will offer a range of academic and vocational qualifications including GCSEs in English,

UTC	<p>Maths and Science, as well as paid work placements linked directly to employment opportunities.</p> <p>University Technical College: These specialise in subjects that need modern, technical, industry-standard equipment such as engineering and construction, teaching these disciplines alongside business skills and the use of ICT. They are sponsored by a local university and employers, and often work in partnership with FE colleges and established academy trusts. They are usually for 500-800 students.</p>
Nursery places Part Time Equivalent (PTE)	<p>Nursery places are for pre-Reception 4-year olds or younger.</p> <p>School nursery capacity is always shown in part time equivalent places with 1 PTE place equalling 15 hours a week, term time only. Schools may however offer both universal and extended entitlement places. An extended entitlement place would take up 2 PTE of capacity.</p>
Published Admission Number (PAN)	<p>This is the maximum number of pupil places which MUST be offered if there are enough applications. For primary schools this is for 4-year-olds. For secondary schools there is an admission number for Year 7 pupils and may be a separate admission number for Year 12 ("Sixth Form") pupils; the latter is set by the governing body, and not shown in this Plan. Schools can agree to admit more than this number.</p> <p>The PAN for 2020/21 is shown for the purpose of comparing to actual year group numbers; the PAN for 2021 is also shown for the purpose of comparing to applications and allocations data for the 2021 intake. At the time of collating this Plan, confirmed actual intakes for 2021 are not available.</p>
Pupil numbers by year group 2020/21	<p>Number of pupils on the school roll as at the school census in May 2021. Reception is the first year group in a primary school, for children of compulsory school age of 4 or 5. Comparing this to the PAN shows how full the school is in the youngest year group. Likewise, comparing Year 7 pupils (the first year of secondary school) to the PAN shows how full a secondary school is in the youngest year group. Years 12 and 13 are often collectively referred to as "sixth form". At the time of collating this Plan, confirmed numbers on roll for 2021/22 are not available.</p>
Total pupil numbers 2020/21	<p>Number of pupils on the school roll as at the school census in May 2021. Nursery pupils are not included. Comparing this to the capacity shows how full the school is overall. At the time of collating this Plan, confirmed numbers on roll for 2021/22 are not available.</p>
Capacity of school as at May 2021	<p>For non-academy schools, this is the "net capacity" assessed by a DfE methodology to show the number of pupil places available. For primary schools, the net capacity is calculated based on the number and size of spaces designated as 'class bases' for Years Reception - 6.</p>

	<p>Nursery classrooms are excluded from the number shown. For secondary schools, the net capacity is based on the number, size and type of teaching spaces and the age range of the school.</p> <p>Net capacity measurement at Academies is replaced by the number of places agreed as part of their funding agreement with the Secretary of State for Education, unless this is known to be out of date.</p>
1st preference applications for 2021/22	Number of applications received where the school is listed as the first preference by the parent(s) / guardian. This is an indication of how popular the school is. If this is higher than the published admission number, the school is over-subscribed.
Allocations for September 2021 (at June 2021)	This is the number of places allocated for children arriving at primary school, or transferring to secondary school, in September 2021. The actual number of pupils arriving in September may be higher than this – if there were late applications – or lower – if parents do not take up the place offered (for example they move away). In some areas there can be significant numbers of late applications, particularly for primary schools. At the time of collating this Plan, confirmed actual intakes for 2021 are not available.
Nursery school	While nursery classes are included within many primary schools, there are also seven local authority maintained nursery schools, that provide a range of structured educational experiences based on learning through play for under-5s.
Resource Bases	Specialist provision for children with Special Educational Needs & Disabilities (SEND) e.g. hearing impairment or autism, based on the sites of mainstream schools.
Special schools	Schools providing education for children with Special Educational Needs & Disabilities (SEND).
MSOA	A Middle Layer Super Output Area (MSOA) is a geographic area used for reporting small area statistics in England and Wales. Middle Layer Super Output Areas are built from groups of contiguous Lower Layer Super Output Areas
Multi Academy Trust (MAT)	All academies in a MAT are governed by one trust and a single board of directors. The board of directors is responsible for decisions relating to how each academy is run, from the curriculum to staffing. The MAT can establish a local governing body for each of its academies, to which it can delegate some of its functions. The MAT remains accountable for these functions.
Umbrella Trust (UT)	Each academy has its own trust, but all the schools in the UT can share governance and procurement of services. If a group of schools wants to convert as part of a UT, each school converts separately, but will set up an umbrella trust to join together. The schools can agree that the UT will appoint governors or members of the trusts in each of the schools, and set a joint vision.

School year groups

Age	Sector	Year Group	Stage
2–4	Early years	Nursery years	Foundation Stage
4–5	Early years	Reception year	Foundation Stage
5–7	Infant	Years 1 and 2	Key Stage 1
7–11	Junior	Years 3, 4, 5, 6	Key Stage 2
11–14	Secondary	Years 7, 8, 9	Key Stage 3
14–16	Secondary	Years 10 and 11	Key Stage 4
16–19	Sixth Form	Years 12 and 13	Key Stage 5

Alphabetical list of primary schools

For school planning purposes, Oxfordshire is divided into 23 learning communities, which are defined by secondary schools and their feeder primary schools; towns which have more than one secondary school are treated as a single learning community – e.g. Witney. The data and strategy sections of this Pupil Place Plan are organised by learning community, and pupil forecast have been provided at this level.

Some learning communities are then divided into smaller planning sub-areas, based on criteria set out by the Department for Education including the geographic characteristics of the area, distances between schools and parental preference patterns. For example, Witney is divided into Witney North and Witney South based on the designated areas of the two secondary schools. Within each area strategy section, comments are provided at planning sub-area level.

School	Learning Community	Planning sub-area (where relevant)
Abbey Woods Academy	Abingdon	Abingdon East
All Saints Church of England (Aided) Primary School	Didcot	Didcot North
Appleton Church of England (A) Primary School	Cumnor	N/A
Ashbury with Compton Beauchamp CE (A) Primary School	Faringdon	N/A
Aston & Cote Church of England Primary School	Witney	Witney South
Aston Rowant Church of England Primary School	Thame	Thame Villages
Aureus Primary School	Didcot	Didcot South Town
Badgemore Primary School	Henley	N/A
Bampton Church of England Primary School	Burford	Burford South
Barley Hill Primary School	Thame	Thame Town
Barton Park Primary School	Oxford	Oxford East
Bayards Hill Primary School	Oxford	Oxford East
Beckley Church of England Primary School	Wheatley	N/A
Benson CE Primary School	Wallingford	N/A
Bishop Carpenter Church of England Aided Primary School	Bloxham	Bloxham West
Bishop Loveday Church of England Primary School	Banbury	Banbury South
Bladon Church of England Primary School	Woodstock	N/A
Bletchingdon Parochial Church of England Primary School	Woodstock	N/A
Blewbury Endowed Church of England Primary School	Didcot	Didcot South Villages
Bloxham Church of England Primary School	Bloxham	Bloxham East

Botley School	Cumnor	N/A
Brightwell-Cum-Sotwell CE Primary School	Wallingford	N/A
Brize Norton Primary School	Burford	Burford South
Brookside Primary School	Bicester	Bicester South West
Buckland Church of England Primary School	Faringdon	N/A
Bure Park Primary School	Bicester	Bicester North Town
Burford Primary School	Burford	Burford North
Caldecott Primary School	Abingdon	Abingdon South
Carswell Community Primary School	Abingdon	Abingdon South
Carterton Primary School	Carterton	N/A
Chadlington Church of England Primary School	Chipping Norton	Chipping Norton South
Chalgrove Community Primary School	Watlington	N/A
Charlbury Primary School	Chipping Norton	Chipping Norton South
Charlton Primary School	Wantage	Wantage South
Charlton-On-Otmoor Church of England Primary School	Bicester	Bicester South East
Checkendon Church of England Primary School	Woodcote	N/A
Cherry Fields Primary School	Banbury	Banbury North East
Chesterton Church of England Primary School	Bicester	Bicester South West
Chilton County Primary School	Didcot	Didcot South Villages
Cholsey Primary School	Wallingford	N/A
Christopher Rawlins CE Voluntary Aided Primary School	Bloxham	Bloxham East
Church Cowley St James CE Primary School	Oxford	Oxford South
Clanfield Church of England Primary School	Burford	Burford South
Clifton Hampden Church of England Primary School	Abingdon	Abingdon East
Combe Church of England Primary School	Woodstock	N/A
Cropredy Church of England Primary School	Banbury	Banbury North East
Crowmarsh Gifford Church of England School	Wallingford	N/A
Cumnor Church of England School	Cumnor	N/A
Cutteslowe Primary School	Oxford	Oxford North
Dashwood Banbury Academy	Banbury	Banbury North East
Deddington Church of England Primary School	Bloxham	Bloxham East

Didcot Primary Academy (previously called GEMS Didcot Primary Academy)	Didcot	Didcot South Town
Dorchester St Birinus Church of England School	Abingdon	Abingdon East
Dr Radcliffe's Church of England (Aided) Primary School	Bloxham	Bloxham East
Dr South's Church of England (Aided) Primary School	Kidlington	N/A
Drayton Community Primary School	Abingdon	Abingdon South
Dry Sandford Primary School	Abingdon	Abingdon West
Ducklington Church of England Primary School	Witney	Witney South
Dunmore Primary School	Abingdon	Abingdon North
East Oxford Primary School	Oxford	Oxford Central
Edith Moorhouse Primary School	Carterton	N/A
Edward Feild Primary School	Kidlington	N/A
Enstone Primary School	Chipping Norton	Chipping Norton South
Europa School UK	Abingdon	Abingdon East
Ewelme Church of England (Aided) Primary School	Watlington	N/A
Eynsham Community Primary School	Eynsham	N/A
Faringdon Infant School	Faringdon	N/A
Faringdon Junior School	Faringdon	N/A
Finmere Church of England Primary School	Bicester	Bicester North Villages
Finstock Church of England Primary School	Witney	Witney North
Fir Tree Junior School	Wallingford	N/A
Five Acres Primary School	Bicester	Bicester South East
Freeland Church of England Primary School	Eynsham	N/A
Fringford Church of England Primary School	Bicester	Bicester North Villages
Fritwell CE Voluntary Controlled Primary School	Bicester	Bicester North Villages
Gagle Brook Primary School	Bicester	Bicester North Town
Garsington Church of England Primary School	Wheatley	N/A
Gateway Primary School	Carterton	N/A
Wantage Primary Academy	Wantage	N/A
Glory Farm Primary School	Bicester	Bicester North Town
Goring Church of England Aided Primary School	Woodcote	N/A
Great Milton Church of England Primary School	Wheatley	N/A
Great Rollright Church of England (Aided) Primary School	Chipping Norton	Chipping Norton North

Great Tew Primary School	Chipping Norton	Chipping Norton South
Grove Church of England School	Wantage	Wantage North
Hagbourne Church of England Primary School	Didcot	Didcot South Villages
Hailey Church of England Primary School	Witney	Witney North
Hanborough Manor Church of England School	Eynsham	N/A
Hanwell Fields Community School	Banbury	Banbury West
Hardwick Community School	Banbury	Banbury West
Harriers Banbury Academy	Banbury	Banbury South
Harwell Community Primary School	Didcot	Didcot South Villages
Heyford Park Free School	Bicester	Bicester North Villages
Hill View Primary School	Banbury	Banbury West
Holy Trinity Catholic Primary School	Chipping Norton	Chipping Norton North
Hook Norton Church of England Primary School	Chipping Norton	Chipping Norton North
Hornton Primary School	Bloxham	Bloxham West
Horspath Church of England Primary School	Wheatley	N/A
John Blandy Voluntary Controlled Primary School	Faringdon	N/A
John Hampden Primary School	Thame	Thame Town
John Henry Newman Academy	Oxford	Oxford South
Kidmore End Church of England (Aided) Primary School	Sonning Common	N/A
Kingham Primary School	Chipping Norton	Chipping Norton North
King's Meadow School	Bicester	Bicester South West
Kirtlington Church of England School	Woodstock	N/A
Ladygrove Park Primary School	Didcot	Didcot North
Langford Village Community Primary School	Bicester	Bicester South East
Larkrise Primary School	Oxford	Oxford Central
Launton Church of England School	Bicester	Bicester South East
Leafield Church of England (Controlled) Primary School	Burford	Burford North
Lewknor (Church of England) Primary School	Watlington	N/A
Little Milton Church of England Primary School	Wheatley	N/A
Long Furlong Primary School	Abingdon	Abingdon North
Long Wittenham (Church of England) Primary School	Didcot	Didcot North
Longcot & Fernham Church of England School	Faringdon	N/A

Longfields Primary School	Bicester	Bicester South East
Longford Park Primary School	Banbury	Banbury South
Longworth Primary School	Faringdon	N/A
Madley Brook Community Primary School	Witney	Witney North
Manor School	Didcot	Didcot South Town
Marcham Church of England Primary School	Abingdon	Abingdon West
Marsh Baldon Church of England Controlled School	Wheatley	N/A
Middle Barton School	Chipping Norton	Chipping Norton South
Mill Lane Community Primary School	Thame	Thame Villages
Millbrook Primary School	Wantage	Wantage North
Nettlebed Community School	Woodcote	N/A
New Hinksey Church of England Primary School	Oxford	Oxford Central
New Marston Primary School	Oxford	Oxford East
North Hinksey Church of England Primary School.	Cumnor	N/A
North Kidlington School	Kidlington	N/A
North Leigh Church of England Primary School	Witney	Witney North
Northbourne Church of England Primary School	Didcot	Didcot South Town
Orchard Fields Community School	Banbury	Banbury West
Orchard Meadow Primary School	Oxford	Oxford South
Our Lady of Lourdes Catholic Primary School, Witney	Witney	Witney South
Our Lady's Catholic Primary School	Oxford	Oxford Central
Pegasus Primary School	Oxford	Oxford South
Peppard Church of England Primary School	Sonning Common	N/A
Queen Emma Community Primary School	Witney	Witney South
Queensway School	Banbury	Banbury South
Radley Church of England Primary School	Abingdon	Abingdon North
Rose Hill Primary School	Oxford	Oxford South
Royal Air Force Benson Community Primary School	Watlington	N/A
Rush Common School	Abingdon	Abingdon North
Sacred Heart Catholic Primary School, Henley-on-Thames	Henley	N/A
Sandhills Community Primary School	Wheatley	N/A
Shellingford Church of England (Voluntary Aided) School	Faringdon	N/A

Shenington Church of England Primary School	Bloxham	Bloxham West
Shiplake Church of England Primary School	Henley	N/A
Shrivenham CE (Controlled) Primary School	Faringdon	N/A
Sibford Gower Endowed Primary School	Bloxham	Bloxham West
Sonning Common School	Sonning Common	N/A
South Moreton School	Didcot	Didcot South Villages
South Stoke Primary School	Woodcote	N/A
Southwold Primary School	Bicester	Bicester North Town
St Aloysius' Catholic Primary School	Oxford	Oxford North
St Amand's Catholic (VA) Primary School, East Hendred	Wantage	Wantage South
St Andrew's Church of England Primary School	Oxford	Oxford East
St Andrew's Church of England Primary School, Chinnor	Thame	Thame Villages
St Barnabas' Church of England (Aided) Primary School	Oxford	Oxford North
St Blaise Church of England Primary School	Abingdon	Abingdon South
St Christopher's Church of England Primary School	Oxford	Oxford Central
St Christopher's CE Primary School, Langford	Burford	Burford South
St Ebbe's Church of England Primary School	Oxford	Oxford Central
St Edburg's Church of England (VA) School, Bicester	Bicester	Bicester South West
St Edmund's Catholic (VA) Primary School, Abingdon	Abingdon	Abingdon North
St Francis Church of England Primary School	Oxford	Oxford Central
St Frideswide CE Primary School	Oxford	Oxford Central
St James Church of England Primary School, Hanney	Wantage	Wantage North
St John Fisher Catholic Primary School, Oxford	Oxford	Oxford South
St John the Evangelist Church of England Primary School	Carterton	N/A
St John's Catholic Primary School	Banbury	Banbury South
St John's Primary School	Wallingford	N/A
St Joseph's Catholic Primary School, Banbury	Banbury	Banbury West
St Joseph's Catholic Primary School, Carterton	Carterton	N/A
St Joseph's Catholic Primary School, Oxford	Oxford	Oxford East

St Joseph's Catholic Primary School, Thame	Thame	Thame Town
St Kenelm's Church of England (VC) Primary School	Burford	Burford North
St Laurence Church of England Primary School	Wallingford	N/A
St Leonard's Church of England Primary School	Banbury	Banbury North East
St Mary's Catholic Primary School, Bicester	Bicester	Bicester South West
St Mary's CE (Aided) Primary School, Chipping Norton	Chipping Norton	Chipping Norton North
St Mary's CE (Controlled) Infant School, Witney	Witney	Witney South
St Mary's CE (VC) Primary School, Banbury	Banbury	Banbury North East
St Michael's CE Aided Primary School, Oxford	Oxford	Oxford East
St Mary and St John Church of England Primary School	Oxford	Oxford Central
St Michael's Church of England Primary School, Steventon	Abingdon	Abingdon South
St Nicholas C of E Infants' School & Foundation Stage	Wallingford	N/A
St Nicholas CE Primary School, East Challow	Wantage	Wantage South
St Nicholas' Primary School	Oxford	Oxford East
St Nicolas Church of England Primary School, Abingdon	Abingdon	Abingdon North
St Peter's Church of England (VA) Primary School	Burford	Burford South
St Peter's Church of England Primary School, Cassington	Eynsham	N/A
St Philip and St James' CE Voluntary Aided Primary School	Oxford	Oxford North
St Swithun's Church of England Primary School	Cumnor	N/A
St Thomas More Catholic Primary School	Kidlington	N/A
Stadhampton Primary School	Watlington	N/A
Standlake (Church of England) Primary School	Eynsham	N/A
Stanford-In-The-Vale Church of England Primary School	Wantage	Wantage North
Stanton Harcourt Church of England Primary School	Eynsham	N/A
Stephen Freeman Community School	Didcot	Didcot South Town
Stockham Primary School	Wantage	Wantage South
Stoke Row Church of England Primary School	Woodcote	N/A
Stonesfield Primary School	Woodstock	N/A

Sunningwell Church of England Primary School	Abingdon	Abingdon West
Sutton Courtenay Church of England Primary School	Abingdon	Abingdon South
Tackley Church of England Primary School	Woodstock	N/A
Tetsworth Primary School	Thame	Thame Villages
Thameside Primary School	Abingdon	Abingdon South
The Batt Church of England Aided Primary School, Witney	Witney	Witney South
The Blake Church of England (Aided) Primary School	Witney	Witney North
The Grange Community Primary School	Banbury	Banbury South
The Hundreds Church of England Primary School	Wantage	Wantage South
The Ridgeway CE Primary School, Childrey	Wantage	Wantage South
Thomas Reade Primary School	Abingdon	Abingdon North
Tower Hill School	Witney	Witney South
Trinity Church of England Primary School	Henley	N/A
Tyndale Community School	Oxford	Oxford Central
Uffington Church of England Primary School	Wantage	Wantage North
Valley Road School	Henley	N/A
Wantage Church of England Primary School	Wantage	Wantage South
Wantage Primary Academy	Wantage	Wantage South
Watchfield Primary School	Faringdon	N/A
Watlington Primary School	Watlington	N/A
West Kidlington Primary School	Kidlington	N/A
West Oxford Community Primary School	Cumnor	N/A
West Witney Primary School	Witney	Witney South
Wheatley Church of England Primary School	Wheatley	N/A
Whitchurch Primary School	Woodcote	N/A
William Fletcher Primary School	Woodstock	N/A
William Morris School	Banbury	Banbury West
Willowcroft Community School	Didcot	Didcot South Town
Windale Primary School	Oxford	Oxford South
Windmill Primary School	Oxford	Oxford East
Windrush CE Primary School	Witney	Witney South
Witney Community Primary School	Witney	Witney North
Wolvercote Primary School	Oxford	Oxford North
Wood Farm Primary School	Oxford	Oxford East

Woodcote Primary School	Woodcote	N/A
Woodstock Church of England Primary School	Woodstock	N/A
Wootton St Peter Church of England School	Abingdon	Abingdon West
Wootton-by-Woodstock CE (Aided) Primary School	Woodstock	N/A
Wroxton Church of England Primary School	Bloxham	Bloxham West
Wychwood Church of England Primary School	Burford	Burford North

Alphabetical list of secondary schools

Aureus School	Didcot
Bartholomew School	Eynsham
Blessed George Napier Catholic School	Banbury
Burford Secondary School	Burford
Carterton Community College	Carterton
Cheney School	Oxford
Chiltern Edge School	Sonning Common
Chipping Norton School	Chipping Norton
Didcot Girls' School	Didcot
Europa School UK	Abingdon
Faringdon Community College	Faringdon
Fitzharrys School	Abingdon
Futures Institute Banbury	Banbury
Gillotts School	Henley
Gosford Hill School	Kidlington
Heyford Park Free School	Bicester
Icknield Community College	Watlington
John Mason School	Abingdon
King Alfred's Academy	Wantage
Langtree School	Woodcote
Larkmead School	Abingdon
Lord Williams's School	Thame
Matthew Arnold School	Cumnor
North Oxfordshire Academy	Banbury
Oxford Academy	Oxford
Oxford Spires Academy	Oxford
St Birinus School	Didcot
St Gregory the Great Catholic School	Oxford
The Bicester School	Bicester
The Cherwell School	Oxford
The Cooper School	Bicester
The Henry Box School	Witney
The Marlborough Church of England School	Woodstock
The Swan School	Oxford
The Warriner School	Bloxham
University Technical College (UTC) Oxfordshire	Didcot
Wallingford School	Wallingford
Wheatley Park School	Wheatley
Whitelands Academy	Bicester
Wood Green School	Witney
Wykham Park Academy	Banbury

Pupil forecasts by area

	ACTUAL	FORECASTS				
Year	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Abingdon						
R	677	694	684	726	744	746
1	685	663	684	679	721	734
2	669	678	662	683	681	718
3	644	653	664	652	672	668
4	672	645	655	669	659	675
5	709	658	636	647	661	650
6	596	708	662	643	654	667
7	475	472	544	527	507	519
8	535	479	479	550	535	513
9	502	540	489	491	561	545
10	455	472	510	463	469	533
11	453	444	463	502	458	462
12	257	224	224	232	249	230
13	204	229	201	202	208	222
Banbury						
R	647	683	713	657	659	696
1	662	650	674	704	657	663
2	654	671	655	678	710	670
3	647	663	674	661	686	721
4	673	647	658	670	661	687
5	676	671	641	654	668	663
6	680	677	669	640	655	672
7	483	525	521	517	493	495
8	520	493	531	527	526	504
9	531	524	494	531	530	532
10	491	526	516	490	526	528
11	475	487	519	511	487	524
12	204	217	222	234	234	227
13	202	183	191	195	207	209
Bicester						
R	635	694	628	699	706	748
1	633	648	692	638	708	718
2	593	643	651	697	649	720
3	585	606	647	660	706	664
4	626	592	604	647	664	709
5	650	637	599	614	657	678
6	609	654	633	601	617	662
7	572	572	605	584	563	581
8	557	583	576	614	593	577
9	525	554	579	576	615	597
10	494	530	555	584	583	625
11	471	496	530	557	593	594
12	175	191	203	217	229	249
13	150	154	167	178	191	202

	ACTUAL	FORECASTS				
Year	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Bloxham						
R	205	217	229	209	212	222
1	226	208	218	230	212	214
2	209	232	214	224	236	218
3	212	210	231	215	225	236
4	204	217	214	234	219	228
5	230	210	218	215	236	221
6	226	230	209	216	213	233
7	280	280	284	268	274	283
8	284	282	280	284	270	274
9	259	284	279	278	283	269
10	253	266	287	282	282	288
11	225	253	264	285	280	281
12	73	72	80	83	90	88
13	66	69	68	75	78	84
Burford						
R	181	160	181	201	194	194
1	183	181	162	182	202	194
2	179	186	185	165	185	204
3	185	183	190	189	170	188
4	181	184	182	189	188	169
5	178	179	182	179	186	185
6	179	183	184	186	184	190
7	246	265	265	267	267	259
8	246	249	267	267	269	268
9	241	248	252	269	268	270
10	271	237	244	248	263	261
11	222	265	233	239	243	257
12	106	123	144	129	132	133
13	109	100	117	136	122	124
Carterton						
R	197	185	204	222	204	206
1	181	182	172	191	206	192
2	210	171	174	166	181	196
3	203	193	160	163	155	170
4	191	186	178	149	152	145
5	179	177	172	167	139	143
6	180	161	160	156	151	126
7	116	113	103	104	105	101
8	96	112	109	102	102	103
9	119	87	101	99	92	93
10	86	105	76	90	88	82
11	97	85	103	76	89	87
12	22	23	20	25	18	22
13	27	18	19	17	21	16

Pupil forecasts by area

Year	ACTUAL	FORECASTS	2022/23	2023/24	2024/25	2025/26
Year	2020/21	2021/22				
Chipping Norton						
R	223	204	212	244	233	242
1	241	232	211	219	251	242
2	213	248	238	218	226	258
3	227	216	250	239	220	228
4	237	225	213	247	236	218
5	247	238	226	215	247	237
6	228	254	244	232	221	254
7	179	171	187	181	169	163
8	154	180	171	187	181	170
9	172	156	179	172	187	181
10	138	175	159	181	175	190
11	140	137	172	156	178	172
12	91	82	81	98	91	102
13	87	87	78	77	93	87
Cumnor						
R	199	188	213	174	180	176
1	217	199	190	213	179	182
2	215	217	199	191	217	180
3	213	212	214	198	193	214
4	230	213	213	217	203	195
5	225	228	213	212	219	202
6	210	224	227	213	215	219
7	210	194	210	210	197	198
8	211	206	192	208	209	194
9	210	216	212	199	216	214
10	211	203	210	205	196	211
11	182	214	206	214	210	199
12	142	123	143	139	145	141
13	132	135	118	137	134	138
Didcot						
R	590	602	581	564	551	583
1	566	606	602	583	566	561
2	557	570	601	596	578	568
3	563	566	570	601	594	583
4	573	569	562	566	596	595
5	527	580	570	564	568	603
6	460	539	579	570	561	571
7	541	581	685	696	700	689
8	615	561	592	695	703	713
9	614	630	574	601	701	714
10	578	668	683	625	653	762
11	522	582	663	678	622	652
12	252	253	279	315	322	298
13	199	227	228	251	282	288

Year	ACTUAL	FORECASTS	2022/23	2023/24	2024/25	2025/26
Year	2020/21	2021/22				
Eynsham						
R	119	140	126	120	109	117
1	118	130	151	134	125	117
2	124	127	139	159	140	133
3	150	135	136	145	164	146
4	152	160	145	143	150	170
5	168	157	164	148	145	153
6	148	173	162	167	150	146
7	211	211	240	228	227	211
8	209	217	218	245	230	231
9	210	216	223	224	248	235
10	204	217	222	228	227	253
11	210	207	220	224	228	228
12	131	139	139	148	149	150
13	108	130	137	137	145	147
Faringdon						
R	289	266	285	280	286	285
1	258	286	271	288	283	285
2	265	262	287	276	289	283
3	263	263	265	288	276	285
4	253	265	268	272	291	277
5	247	239	255	259	261	276
6	263	249	240	258	262	260
7	253	280	275	267	282	289
8	262	253	280	277	268	280
9	232	268	260	288	284	273
10	209	224	258	252	278	274
11	230	206	220	254	248	271
12	85	99	89	97	110	107
13	80	82	96	87	94	105
Henley						
R	117	145	121	108	104	105
1	135	124	149	128	114	108
2	110	137	126	151	129	115
3	125	117	140	131	155	132
4	134	128	120	142	132	155
5	137	134	127	122	141	130
6	143	140	135	130	124	140
7	177	194	191	179	174	169
8	200	183	199	197	182	176
9	177	198	181	198	194	177
10	175	179	197	182	197	192
11	164	180	182	202	184	199

Pupil forecasts by area

	ACTUAL	FORECASTS				
Year	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Kidlington						
R	168	144	159	163	162	168
1	180	167	145	159	162	162
2	160	174	161	142	154	158
3	174	160	174	162	143	155
4	173	167	154	166	155	138
5	185	170	165	153	163	155
6	177	181	167	162	150	161
7	102	141	144	135	130	125
8	152	102	139	143	135	132
9	141	149	101	137	142	136
10	144	137	145	100	134	141
11	160	145	139	146	102	138
12	55	64	59	56	60	43
13	40	49	57	53	51	55
Oxford						
R	1266	1175	1189	1153	1157	1175
1	1245	1263	1181	1192	1166	1168
2	1292	1205	1221	1148	1163	1137
3	1304	1242	1161	1176	1117	1129
4	1336	1274	1217	1141	1162	1105
5	1429	1317	1259	1205	1140	1159
6	1349	1436	1326	1270	1222	1161
7	1160	1198	1279	1179	1132	1090
8	1251	1150	1184	1266	1175	1128
9	1046	1222	1127	1160	1244	1155
10	1081	1023	1191	1102	1136	1217
11	1070	1065	1009	1174	1090	1122
12	712	758	759	735	840	795
13	638	602	618	618	601	695
Sonning Common						
R	88	83	92	78	76	76
1	83	95	89	98	83	80
2	92	87	96	92	99	84
3	90	94	88	97	93	99
4	95	93	96	90	98	94
5	102	96	94	96	90	97
6	101	106	99	97	99	92
7	80	91	92	59	59	59
8	76	70	78	79	52	51
9	61	68	62	69	69	47
10	61	48	52	48	53	53
11	77	61	48	52	47	52

	ACTUAL	FORECASTS				
Year	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Thame						
R	273	290	288	259	251	257
1	270	292	303	298	272	263
2	266	284	299	307	305	278
3	253	282	293	306	315	313
4	256	264	288	296	311	319
5	286	269	271	293	303	316
6	261	297	275	274	299	307
7	333	337	363	342	341	365
8	321	339	341	366	346	344
9	326	325	338	338	364	344
10	351	329	325	336	336	362
11	319	356	330	325	337	337
12	282	264	288	268	267	274
13	245	257	238	260	243	242
Wallingford						
R	252	227	258	242	245	256
1	235	261	233	266	253	254
2	226	236	258	233	267	253
3	224	228	236	259	236	268
4	206	223	225	235	258	236
5	193	208	222	226	238	259
6	189	199	211	226	231	244
7	218	201	212	222	235	237
8	226	223	206	219	230	241
9	195	231	226	211	225	237
10	205	194	227	223	212	225
11	193	212	199	235	230	221
12	150	144	157	149	173	167
13	122	139	133	147	139	161
Wantage						
R	376	387	378	384	400	422
1	368	401	399	394	400	415
2	371	398	421	422	418	423
3	377	385	403	429	431	425
4	344	397	396	415	443	444
5	401	356	400	401	421	449
6	342	419	368	414	412	430
7	239	282	337	300	338	332
8	260	246	286	341	306	342
9	249	277	255	297	354	315
10	261	235	256	236	277	329
11	283	264	235	257	237	277
12	197	180	166	151	164	152
13	152	181	162	150	138	150

Pupil forecasts by area

	ACTUAL	FORECASTS				
Year	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Watlington						
R	125	107	146	143	145	157
1	117	130	113	151	147	150
2	131	119	130	117	152	149
3	114	132	120	132	120	154
4	125	112	128	120	130	120
5	121	118	106	124	116	126
6	116	120	116	105	123	116
7	142	146	150	148	139	154
8	151	146	150	156	153	146
9	138	150	144	150	156	154
10	158	138	148	144	150	157
11	137	156	136	147	143	151
Wheatley						
R	174	173	153	150	147	153
1	168	173	174	152	150	149
2	182	166	172	172	151	152
3	176	171	158	160	162	145
4	179	175	170	156	158	162
5	209	170	166	160	147	151
6	159	203	167	162	157	145
7	179	162	196	167	162	159
8	181	180	165	195	168	165
9	181	179	178	162	192	169
10	183	177	176	173	159	190
11	163	181	176	174	172	160
12	122	88	98	95	94	94
13	83	106	77	85	82	82
Witney						
R	395	393	398	413	392	396
1	396	418	415	420	434	408
2	393	411	431	428	432	443
3	427	399	416	435	430	432
4	463	439	408	427	442	436
5	411	464	441	410	426	438
6	416	422	473	452	419	432
7	391	388	392	436	415	385
8	401	398	395	399	441	418
9	400	410	406	404	408	447
10	326	405	414	412	409	411
11	378	330	409	418	415	411
12	204	183	162	199	202	200
13	170	190	171	152	186	188

	ACTUAL	FORECASTS				
Year	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Woodcote						
R	103	114	113	93	91	95
1	117	108	117	117	97	96
2	108	119	109	117	118	99
3	112	106	115	107	114	115
4	120	114	108	116	109	116
5	123	119	111	106	113	108
6	115	124	120	111	106	113
7	120	118	120	121	112	110
8	144	123	120	123	123	114
9	118	145	124	122	124	125
10	119	119	144	124	122	124
11	120	124	122	148	127	126
Woodstock						
R	172	152	166	150	152	169
1	158	176	156	172	158	162
2	174	160	179	159	177	165
3	165	176	163	182	165	186
4	156	165	176	166	186	171
5	182	156	163	176	166	189
6	164	185	160	169	183	176
7	182	174	192	173	178	191
8	179	184	176	195	177	184
9	178	181	183	178	197	182
10	180	183	186	189	184	205
11	179	186	188	193	193	191
12	85	80	83	85	87	88
13	58	72	68	71	73	76

Area context, issues and strategy: ABINGDON

Planning context	<p>This area is affected by the planning policies of both the Vale of White Horse (VOWH) and South Oxfordshire (SODC) District Councils.</p> <p>The main proposed housing developments affecting this area are:</p> <ul style="list-style-type: none">• 1,150 homes across two sites at North and North West Abingdon• Dalton Barracks, to the west of the town, where the VOWH Local Plan includes 1,200 new homes; a planning application is expected a larger development, and there may be proposals for further growth beyond the time period of the current Local Plan.• Culham Science Centre, where the SODC Local Plan includes 3,500 new homes• Berinsfield, where 1,700 new homes are planned as part of a regeneration-led Garden Village. <p>There are also some housing developments within the surrounding villages which, while smaller-scale, will have a significant impact on the local primary schools.</p> <p>Abingdon has an MoD base, and therefore numbers are subject to volatility related to personnel redeployments.</p>
Abingdon North Primary	<p>Demand for primary school places in North Abingdon has fluctuated significantly in recent years, but the last of previous "bulge" classes left in 2019.</p> <p>Pupil forecasts indicate growth in demand for school places in Radley relating to planned housing development, while intakes at the town schools in this area are forecast to be more constant. However, the large-scale housing growth located in North and North West Abingdon is on the border of the Abingdon West and Abingdon North planning areas. The current forecast shows most of this affecting Abingdon West pupil numbers, but it is likely that the impact will be more evenly distributed.</p> <p>Expansion of Radley Primary School [3238] from 0.5fe to 1fe is underway in response to the permitted housing growth. This is forecast to provide sufficient capacity for the Abingdon North area.</p>
Abingdon East Primary	<p>Abingdon East comprises mostly village schools, which have significant spare capacity, the exception being the Europa School, a bilingual all-through free school, which is oversubscribed. Although shown in the Abingdon East planning area, the Europa School draws pupils from a wider area due to the bilingual education it provides. It could particularly affect the other Abingdon planning areas, as well as the Oxford, Didcot, Faringdon and Wantage areas.</p> <p>The Culham and Berinsfield strategic developments lie within this area.</p> <p>Reception numbers are forecast to increase gradually over the next few years, before the large-scale housing growth at Berinsfield and Culham generate rapid population growth later in the decade.</p> <p>Recent changes in school capacity in this area:</p> <ul style="list-style-type: none">• Europa [4002] has increased its admission number from 84 to 90 in 2019.

- Culham Parochial CE Primary School closed in March 2020, and was merged with Clifton Hampden CE Primary School [3183]. This resulted in a net decrease in admission numbers across the two schools of 5 places, and a net decrease in capacity of 30.
- Abbey Woods Academy [2007] has determined a reduction in PAN from 45 to 30 for 2022 onwards. The academy is rationalising its use of accommodation.

In the longer term (beyond 2025) new schools will be required for the Culham development; this is likely to comprise two 2-form entry primary schools, and one 8-form secondary school with sixth form. Further investigation will be required into how this provision relates to the current Europa School.

A new primary school and/or a significant expansion of Abbey Woods Academy will also be needed at Berinsfield.

Abingdon South Primary

Following previous sustained increases in demand, most schools in this area have now expanded or taken bulge classes. Apparent spare capacity will be eroded as new housing is completed and occupied. Allocations for the September 2021 intake are higher than expected, as the expansion of St Blaise Primary School is changing patterns of movement, making it difficult to forecast the next few years. Forecasts currently show a dip in intake for 2022, but it is likely that the actual intake will again exceed the forecast, as the forecasting model will not yet have fully adjusted to the expansion of capacity.

The area has generally seen small-medium scale housing growth, having a significant impact where this occurs in village locations which have not had a history of growth previously.

Schools in this planning area (particularly Sutton Courtenay, St Blaise, St Michael's) are close to the Didcot area, and could be affected by housing development there; they could also be affected by new schools opening in Didcot. In particular, the expansion of St Blaise ahead of village housing growth is attracting pupils from the Didcot area, given that parts of Didcot are experiencing a shortage of places due to rapid housing development.

Recent/ongoing expansions in the area:

- St Blaise [3260] - from 0.5fe to 1fe, from 2021
- Sutton Courtenay [3243]; Drayton [2560] – both expanded in 2017 to 1fe.

No further changes in school capacity are currently planned for this area.

Abingdon West Primary

Abingdon West comprises small village schools. Current spare capacity is forecast to fall due to housing growth, both within the village of Marcham, and the strategic housing growth underway on the north western edge of Abingdon. A further large strategic housing development is planned at Dalton Barracks. Both sets of developments are located on the border of the Abingdon West and Abingdon North planning areas. The current forecasts show most of this affecting Abingdon West pupil numbers, but it is likely that the impact will be more evenly distributed.

Recent/ongoing expansions in the area:

- Marcham [3235] has expanded to 1FE to provide capacity for local housing growth.

A site for a new primary school has been secured within the large housing development on the north western edge of Abingdon; sites for new schools will also be secured within the Dalton Barracks development, proportionate to the scale of the development permitted.

Abingdon Secondary

Across the three secondary schools within the town there has previously been some surplus capacity. The cohorts due to transfer from primary to secondary schools from 2022 onwards are significantly larger than previous cohorts, which will gradually reduce surplus capacity. The allocations for the September intake exceed the pupil forecast. It is possible, therefore, that the forecast is under-estimating demand for places in this area, perhaps due to significant fluctuations in popularity between schools in this and surrounding areas.

There is significant movement out of this planning area into other secondary schools, including in the private sector: changes in the relative popularity of the Abingdon and adjoining schools could quickly lead to over-subscription. The main direction of movement is into Didcot; however this will change as the Didcot population grows.

Although shown in the Abingdon planning area, the Europa School [4002] draws pupils from a wider area due to the bilingual education it provides. It could particularly affect the other Abingdon planning areas, as well as the Oxford, Didcot, Faringdon and Wantage areas.

The Europa School [4002] (an all-through free school) completed its takeover of the former European School just outside Abingdon in September 2017 and now teaches the whole primary and secondary age range. They have increased their Reception admission number to 90, and this will feed through to the secondary age range in due course.

The large-scale housing growth due at Dalton Barracks and Culham is expected to eventually require at least one new secondary school in this area, but this is not currently expected to be required before the end of the decade.

Abingdon

Schools	Planning Sub-area	School code	Sector	Type of school	Published admission number	Nursery places (PTE)	2020/21 (data correct as of May 2021)												2021/22				
							Total pupil numbers			Total capacity			Allocations		First preference applications		Published admission number						
Europa School	Abingdon East Primary & Abingdon Secondary	4002	All-through	ACA	0	90	90	84	84	84	84	60	60	56	56	50	43	29	926	1192	90	139	90
Abbey Woods Academy	Abingdon East Primary	2007	Primary	ACA	16	45	19	25	21	28	22	32	28	0	0	0	0	0	175	280	45	17	19
Cadecott Primary School	Abingdon South Primary	2605	Primary	COM	110	60	54	59	60	55	58	49	49	0	0	0	0	0	384	420	60	58	60
Carswell Community Primary School	Abingdon South Primary	2595	Primary	COM	40	30	30	27	30	28	29	29	35	0	0	0	0	0	208	249	30	34	29
Clifton Hampden Church of England Primary School	Abingdon East Primary	3183	Primary	VC	0	15	14	15	13	13	13	17	16	0	0	0	0	0	101	105	15	17	15
Dorchester St Birinus Church of England School	Abingdon East Primary	3186	Primary	VC	0	15	13	6	7	15	7	18	8	0	0	0	0	0	74	105	15	8	11
Drayton Community Primary School	Abingdon South Primary	2560	Primary	COM	0	30	29	29	30	28	30	30	24	0	0	0	0	0	200	210	30	36	30

Schools		2020/21 (data correct as of May 2021)													2021/22						
		Allocations			First preference applications			Published admission number			Total capacity		Total pupil numbers								
Dry Sandford Primary School	Abingdon West Primary	2565	Primary	COM	0	20	15	16	17	8	22	15	12	0	0	0	105	140	20	17	18
Dunmow Primary School	Abingdon North Primary	3861	Primary	COM	60	60	60	59	60	54	57	60	60	0	0	0	410	420	60	43	48
Long Furlong Primary School	Abingdon North Primary	2602	Primary	COM	26	30	27	28	30	28	32	31	25	0	0	0	201	210	30	40	30
Marcham Church of England (Voluntary Controlled) Primary School	Abingdon West Primary	3235	Primary	VC	0	30	22	30	30	22	24	23	21	0	0	0	172	207	30	25	25
Radley Church of England Primary School	Abingdon North Primary	3238	Primary	VC	48	15	19	14	17	12	15	16	13	0	0	0	106	105	30	12	12
Rush Common School	Abingdon North Primary	2574	Primary	ACA	0	60	57	56	58	60	55	60	50	0	0	0	396	420	60	44	54

Abingdon

Schools	Planning Sub-area	School code	Sector	Published admission number	2020/21 (data correct as of May 2021)												2021/22				
					Total pupil numbers			Total capacity			Allocations			First preference applications			Published admission number				
St Blaise CofE Primary School	Abingdon South Primary	3260	Primary	VC	0	15	13	15	14	14	16	16	10	0	0	0	98	105	30	21	29
St Edmund's Catholic Primary School	Abingdon North Primary	3856	Primary	VA	52	30	30	22	25	22	24	25	28	0	0	0	176	210	30	21	28
St Michael's CofE Primary School, Steventon	Abingdon South Primary	3241	Primary	VC	52	30	23	30	17	22	16	27	17	0	0	0	152	210	30	32	30
St Nicolas Church of England Primary School, Abingdon	Abingdon North Primary	3247	Primary	VC	0	60	59	58	60	58	60	64	56	0	0	0	415	420	60	51	57
Sunningwell Church of England Primary School	Abingdon West Primary	3242	Primary	VC	0	15	14	15	11	7	16	15	11	0	0	0	89	105	15	9	11
Sutton Courtenay Church of England Primary School	Abingdon South Primary	3243	Primary	ACA	52	30	24	29	21	26	20	32	14	0	0	0	166	210	30	23	26

Abingdon

Schools		2021/22																					
		Allocations			First preference applications			Published admission number			Total capacity												
Total pupil numbers		Year 13 pupils			Year 12 pupils			Year 11 pupils			Year 10 pupils												
Year 13 pupils		Year 12 pupils			Year 11 pupils			Year 10 pupils			Year 9 pupils												
Year 12 pupils		Year 11 pupils			Year 10 pupils			Year 9 pupils			Year 8 pupils												
Year 11 pupils		Year 10 pupils			Year 9 pupils			Year 8 pupils			Year 7 pupils												
Year 10 pupils		Year 9 pupils			Year 8 pupils			Year 7 pupils			Year 6 pupils												
Year 9 pupils		Year 8 pupils			Year 7 pupils			Year 6 pupils			Year 5 pupils												
Year 8 pupils		Year 7 pupils			Year 6 pupils			Year 5 pupils			Year 4 pupils												
Year 7 pupils		Year 6 pupils			Year 5 pupils			Year 4 pupils			Year 3 pupils												
Year 6 pupils		Year 5 pupils			Year 4 pupils			Year 3 pupils			Year 2 pupils												
Year 5 pupils		Year 4 pupils			Year 3 pupils			Year 2 pupils			Year 1 pupils												
Year 4 pupils		Year 3 pupils			Year 2 pupils			Year 1 pupils			Reception pupils												
Year 3 pupils		Year 2 pupils			Year 1 pupils			Reception pupils			Published admission number												
Year 2 pupils		Year 1 pupils			Reception pupils			Published admission number			Nursery places (PTE)												
Year 1 pupils		Reception pupils			Published admission number			Nursery places (PTE)			Type of school												
Reception pupils		Published admission number			Nursery places (PTE)			Type of school			Sector												
Published admission number		Nursery places (PTE)			Type of school			Sector			School code												
Nursery places (PTE)		Type of school			Sector			School code			Planning Sub-area												
Planning Sub-area		School code			Sector			School code			Planning Sub-area												
Thameside Primary School	Abingdon South Primary	2598	Primary	ACA	52	30	25	29	26	21	30	23	21	177	210	30	21	41	30	24	24	692	444
Thomas Reade Primary School	Abingdon North Primary	2587	Primary	COM	15	30	30	24	29	26	29	31	13	13	0	0	0	0	0	0	0	724	432
Wootton St Peter's Church of England Primary School	Abingdon West Primary	3854	Primary	VA	0	16	10	9	9	9	13	13	12	11	0	0	0	0	0	0	0	786	630
Fitzharrys School	Abingdon Secondary	4127	Secondary	ACA	0	180	0	0	0	0	0	0	0	0	109	131	119	92	101	49	25	453	455
John Mason School	Abingdon Secondary	4126	Secondary	ACA	0	180	0	0	0	0	0	0	0	0	179	176	172	175	162	89	105	1058	1040
Larkmead School	Abingdon Secondary	4125	Secondary	ACA	0	180	0	0	0	0	0	0	0	0	127	168	155	132	140	76	45	843	1060
Primary/Nursery Total																							
Secondary Total																							

2020/21 (data correct as of May 2021)

Area context, issues and strategy: BANBURY

Planning context	<p>This area is affected by the planning policies of Cherwell District Council.</p> <p>Banbury is a major focus for housing growth in the Cherwell Local Plan, with large developments planned or underway to the south, north and west of the town, as well as some redevelopment proposals within the town centre.</p> <p>For several years, pupil intakes at primary schools in this area rose significantly faster than previously forecast, and some schools were required to create "bulge" classes at short notice. Population growth stabilised in recent years, but demand for primary school places started to grow again in 2019, and is forecast to increase further in future years, focussed on the large housing developments.</p> <p>Births data indicates that young families are being attracted to the new developments, with births in some more established parts of the town falling sharply. As a result, spatial patterns of demand for school places are changing. Pupil census data shows a particular pattern of in-year growth in both primary and secondary pupil numbers in the last two years, indicative of families moving into the new housing from outside the area.</p>
Banbury North East Primary	<p>Demand for places in this area is forecast to grow as the housing development at Southam Road populates. At the same time, there has been a fall in births in the established community of Grimsbury.</p> <p>The 1 form entry Cherry Fields Primary School [2036] opened in 2020. Opening a new school inevitably creates some short-term surplus capacity, until the population growth catches up with the expansion of capacity, but this will decline over the next few years.</p> <p>In response to falling demand for school places in the Grimsbury area, St Leonard's CE Primary School [3262] has reduced its admission number from 60 to 45 for 2022.</p>
Banbury South Primary	<p>The south of Banbury is seeing the bulk of the town's housing growth. Longford Park in the south east is well underway, and will continue building out for the rest of the decade. Further large Local Plan allocations south of Salt Way have started. This will result in significant growth in pupil numbers over the coming years.</p> <p>Longford Park Primary School [2017] opened in 2017, initially built as a 1.5 form entry school but expected to expand to 2 forms of entry as the local population grows.</p> <p>A further new school is expected in the development south of Salt Way. Current forecasts indicate that this may be required in 2025 or 2026.</p> <p>St John's Catholic School [2035] has reduced its admission number for 2022 from 45 to 30 in response to a fall in demand for Catholic school places in this area.</p>
Banbury West Primary	<p>A number of small-medium housing developments are underway or planned for the western edge of Banbury, which will increase demand for school places. At the same time, more established areas of Banbury such as Neithrop have seen falling births.</p>

There has already been expansion of school capacity in this area, with Hanwell Fields Primary School [3837] and Hill View Primary School [2056] having been extended. William Morris Primary School [2019] has now embarked on a building programme which will slightly increase capacity and replace aging temporary classrooms.

As young families appear to be migrating to the newer housing developments, some areas of surplus capacity are appearing in older parts of town, and reductions in admission numbers at some schools may be appropriate to provide greater stability until the local population grows again.

Banbury Secondary As well as three secondary schools in Banbury there is a studio school, Futures Institute [4006] which opened in 2014 to provide more specialist technology education for the 14-18 age range. This is accommodated in buildings previously used by Banbury School (now Wykham Park Academy, 4000), reducing the physical capacity of that school.

The increase in pupil numbers already evident in local primary schools will in due course increase secondary pupil numbers. The full impact of the local housing growth in secondary school numbers will not be felt until well beyond the current pupil forecast period.

Some of the demand for secondary school places in this area is absorbed by The Warriner School [4007] in the adjoining Bloxham area. This has previously been expanded, reducing pressure on places in Banbury.

Blessed George Napier RC School [4600] has been approved to expand by 2 forms of entry, with new buildings due to complete in 2023.

Wykham Park Academy is reducing its admission number from 210 to 180 for 2022 onwards.

Given the scale of local housing growth, the need for a new school is expected in the longer term, and a site for this school is identified in the Local Plan. It is not currently expected that this school will be needed before the end of the decade.

Banbury																	2021/22							
Schools		2020/21 (data correct as of May 2021)															2021/22							
		Published admission number			Total capacity			Allocations			First preference applications			Published admission number			Total pupil numbers							
		Year 13 pupils	Year 12 pupils	Year 11 pupils	Year 10 pupils	Year 9 pupils	Year 8 pupils	Year 7 pupils	Year 6 pupils	Year 5 pupils	Year 4 pupils	Year 3 pupils	Year 2 pupils	Year 1 pupils	Reception pupils	Published admission number	Nursery places (PTE)	Type of school	Sector	School code	Planning Sub-area			
Bishop Loveday CoE Primary School	Banbury South Primary	3351	Primary	ACA	0	60	60	57	49	44	61	64	60	0	0	0	0	0	0	395	420	60	53	54
Cherry Fields Primary School	Banbury North East Primary	2036	Primary	ACA	44	30	13	0	0	0	0	0	0	0	0	0	0	0	0	13	210	30	21	22
Croftedy CoE Primary School	Banbury North East Primary	3000	Primary	VC	0	30	30	25	23	25	22	23	26	0	0	0	0	0	0	174	210	30	24	25
Dashwood Banbury Academy	Banbury North East Primary	2003	Primary	ACA	84	60	46	60	60	44	59	56	53	0	0	0	0	0	0	378	420	60	61	60
Hanwell Fields Community School	Banbury West Primary	3837	Primary	ACA	52	60	60	60	56	56	58	60	60	0	0	0	0	0	0	410	420	60	70	60
Hardwick Primary School	Banbury West Primary	2060	Primary	ACA	24	30	27	30	30	30	30	29	30	0	0	0	0	0	0	206	210	30	38	30
Harriers Banbury Academy	Banbury South Primary	2053	Primary	ACA	32	60	41	56	46	49	60	58	60	0	0	0	0	0	0	370	420	60	64	60
Hill View Primary School	Banbury West Primary	2056	Primary	ACA	40	90	59	60	59	80	67	79	73	0	0	0	0	0	0	477	630	90	43	51
Longford Park Primary School	Banbury South Primary	2017	Primary	ACA	78	45	32	30	30	23	0	0	0	0	0	0	0	0	0	115	315	45	43	43

Schools		2020/21 (data correct as of May 2021)																	2021/22			
		Published admission number			Total capacity			Total pupil numbers			First preference applications			Allocations								
Planning Sub-area	Sector	Type of school	Published admission number	Reception pupils	Year 1 pupils	Year 2 pupils	Year 3 pupils	Year 4 pupils	Year 5 pupils	Year 6 pupils	Year 7 pupils	Year 8 pupils	Year 9 pupils	Year 10 pupils	Year 11 pupils	Year 12 pupils	Year 13 pupils	Total pupil numbers	Published admission number	Total capacity	First preference applications	Allocations
Orchard Fields Community School	Banbury West Primary	2055	Primary	COM	60	60	45	36	51	51	50	45	37	0	0	0	0	315	420	60	46	47
Queensway School	Banbury South Primary	2057	Primary	COM	0	60	58	54	52	60	59	59	54	0	0	0	0	396	420	60	54	55
St John's Catholic Primary School	Banbury South Primary	2035	Primary	ACA	0	45	19	20	30	27	27	26	37	0	0	0	0	186	315	45	18	18
St Joseph's Catholic Primary School, Banbury	Banbury West Primary	3825	Primary	ACA	60	30	25	26	26	30	28	30	31	0	0	0	0	196	210	30	31	30
St Leonard's CoE Primary School	Banbury North East Primary	3262	Primary	VC	120	60	43	48	44	42	54	43	57	0	0	0	0	331	420	60	41	41
St Mary's CoE Primary School, Banbury	Banbury North East Primary	3022	Primary	ACA	52	30	22	30	28	25	26	29	29	0	0	0	0	189	210	30	16	18
The Grange Community Primary School	Banbury South Primary	2058	Primary	COM	0	45	45	45	45	39	50	50	46	0	0	0	0	315	45	31	30	

Banbury													2021/22			
Schools	2020/21 (data correct as of May 2021)															
	Allocations		25		25		25		25		25		25			
	First preference applications		28		169		n/a		682		531					
	Published admission number		25		150		75		820		615					
	Total capacity		175		847		300		5740		3597					
	Total pupil numbers		168		888		113		4639		2906					
	Year 13 pupils		0		77		12		202							
	Year 12 pupils		0		87		5		204							
	Year 11 pupils		0		139		47		475							
	Year 10 pupils		0		140		71		66		491					
	Year 9 pupils		0		146		113		300		180		221			
	Year 8 pupils		0		150		1012		1150		210		141			
	Year 7 pupils		0		149		178		172		166		180			
	Year 6 pupils		0		0		181		71		41		47			
	Year 5 pupils		0		0		0		0		0		676			
	Year 4 pupils		0		0		0		0		0		483			
	Year 3 pupils		0		0		0		0		0		520			
	Year 2 pupils		0		0		0		0		0		680			
	Year 1 pupils		0		0		0		0		0		673			
	Reception pupils		0		0		0		0		0		647			
	Published admission number		25		0		0		0		0		654			
	Nursery places (PTE)		0		75		0		0		0		662			
	Type of school		26		150		0		0		0		647			
	Planning Sub-area		0		0		0		0		0		820			
	School code		4600		0		0		0		0		672			
	Sector		Primary		ACA		2019		Banbury West Primary		Banbury Secondary		Banbury Secondary			
	Primary/Nursery Total															
	Secondary Total															
William Morris Primary School	Banbury West Primary	2019	Primary	ACA	26	22	25	25	0	0	0	0	0	0	669	540
Blessed George Napier Catholic School and Sixth Form	Banbury Secondary	4600	Secondary	ACA	0	0	150	0	0	0	0	0	0	0	682	531
Futures Institute Banbury	Banbury Secondary	4006	Secondary	STU	0	75	0	0	0	0	0	0	0	0	475	127
North Oxfordshire Academy	Banbury Secondary	6905	Secondary	ACA	0	180	0	0	0	0	0	0	0	0	221	180
Wykham Park	Banbury Secondary	4000	Secondary	ACA	0	210	0	0	0	0	0	0	0	0	141	210
Primary/Nursery Total																
Secondary Total																

Area context, issues and strategy: BICESTER

Planning context	<p>This area is affected by the planning policies of Cherwell District Council.</p> <p>Bicester is the largest focus for housing growth in the Cherwell Local Plan, with major developments planned or underway, particularly to the south and west of the town, requiring significant expansion of school capacity through both school expansions and new schools.</p> <p>Across Bicester there was a dip in births in 2017, resulting in a forecast dip in demand for primary school places in 2022. Beyond that, however, the demand for primary school places is forecast to recover and then continue growing.</p> <p>Births data indicates that young families are being attracted to the new developments, in particular the Kingsmere development in South West Bicester, with births in some more established parts of the town, especially to the north, falling sharply. As a result, spatial patterns of demand for school places are changing.</p>
Bicester North Town Primary	<p>Demand for places in this area is forecast to continue growing after a dip in 2022, but this growth is largely being driven by the North West Bicester development, which has made slower progress than previously planned. At the same time, there has been a fall in births in the more established part of town.</p> <p>Gagle Brook Primary School [2014] opened in 2018 as the first phase of providing school capacity for the North West Bicester development; initially built as 1-form entry, in due course it will be expanded to 2 forms of entry. Pupil numbers have grown more slowly than expected due to delays with delivering the North West Bicester housing. As the development progresses there are expected to be two or three further new primary schools, (as well as a secondary school). Current pupil forecasts indicate that additional capacity will be needed for North West Bicester by 2027, but whether at this stage this is through expansion of Gagle Brook or the opening of the next new school will depend on how the wider development progresses, as the timing for expanding Gagle Brook is dependent on when the adjoining parcel of development, which includes additional site area for the school, comes forward.</p> <p>Bure Park Primary School [2610] has reduced its admission number from 70 to 60 for 2021 onwards, to enable the removal of temporary classrooms previously provided to manage high demand for places in the local area.</p> <p>Southwold Primary School [2607] is reducing its admission number from 60 to 45 for 2022 onwards to protect space for the creation of a special education resource base, due to open early 2022; a further resource base will open at Gagle Brook.</p>
Bicester North Villages Primary	<p>This rural area contains three small village primary schools, and an all-through school within the strategic growth area of Heyford Park. Nearly all housing growth in this area is centred on Heyford Park, resulting in very rapid growth in population and births. The surrounding villages have experienced the volatility in local population common to small village schools, but in recent years there has been no consistent trend.</p> <p>Heyford Park School opened in 2013 to serve the growing community as a former US airbase was redeveloped. In the first instance it provided more</p>

capacity than needed for the immediate local area, and attracted pupils from surrounding villages who would otherwise have attended one of the existing schools. This reduced pupil numbers in the surrounding schools, but numbers have stabilised in recent years.

Further planned growth at Heyford Park will require additional primary school capacity in due course. Current forecasts indicate this would be needed by 2026 or 2027.

**Bicester
South East
Primary**

The large-scale planned housing developments in this area are Graven Hill, which is underway, and the 1,500 home Wretchwick Green. These will in due course generate significant additional pupils in this area.

Pupil numbers at Five Acres Primary School [2200] in Ambrosden are affected by military personal movements at the local garrisons, with approximately a third of pupils being from Service families. This can result in a high degree of pupil movement into and out of the area.

Longfields Primary and Nursery School [2207] was previously expanded to 2 forms of entry to provide replacement town centre school capacity when St Edburg's CE Primary School [3505] relocated to the Kingsmere development.

New schools are planned for both Graven Hill and Wretchwick Green. As is always the case with new schools within housing developments, their timing is dependent on the progress of the host development. The new school for Graven Hill is currently expected to open in 2023. Based on current forecasts the new Wretchwick Green school would not be expected to open until towards the end of the decade.

**Bicester
South West
Primary**

This area of Bicester has seen the most housing growth in recent years, and the Kingsmere housing development has attracted young families, rapidly increasing demand for places at St Edburg's CE Primary School [3505], which relocated here from central Bicester in 2016.

To meet the continued growth of population in the Kingsmere area, St Edburg's CE Primary School has been approved to expand from 2 form entry to 3 form entry. This will be achieved by expanding onto a satellite site, with early years and Key Stage 1 pupils moving to new accommodation, and the current site becoming the Key Stage 2 base. This is due to complete in 2023.

Chesterton CE Primary School [3082] expanded to 1 form entry in 2020.

At this stage, no further expansion of primary school capacity is expected in this area.

**Bicester
Secondary**

Within the town there are two established 11-18 schools, The Bicester School [4011] and The Cooper School [4032], and a new 11-16 school, Whitelands Academy [4017] which opened in 2020. Also in this area is the all-age Heyford Park School [4018] which opened in 2013. Since 2020 the delivery of courses for post-16 pupils at Heyford Park has transferred to Bartholomew School in Eynsham, which is in the same multi-academy trust.

In 2021 The Bicester School fully merged with the adjacent Bicester Technology Studio [4012] which had provided specialist education for the 14-18 age range since 2016. There will continue to be a Technology specialism available at the

school for Year 10 and above, and students can transfer from other schools at this stage.

The increase in pupil numbers already evident in local primary schools will in due course increase secondary pupil numbers. The full impact of the local housing growth in secondary school numbers will not be felt until well beyond the current pupil forecast period.

Although two new schools have already opened in this area to serve housing growth, given the scale of local housing growth, the need for another new school is expected in the longer term, and a site for this school is identified within the North West Bicester development. Based on current forecasts, this school will be needed in the second half of the decade.

In addition, as planned housing numbers at Heyford Park have increased since the school initially opened, that school is expected to need to expand to meet local population growth.

Bicester

Schools	Planning Sub-area	Sector	School code	Type of school	2020/21 (data correct as of May 2021)												2021/22								
					Published admission number			Total capacity			Total pupil numbers			First preference applications			Allocations								
Heyford Park School	Bicester North Villages Primary & Bicester Secondary	4018	All-through	ACA	0	60	32	42	31	34	32	37	48	47	58	62	51	47	0	0	521	840	60	43	47
Barkside Primary School	Bicester South West Primary	2202	Primary	COM	52	45	41	42	44	41	45	44	45	45	0	0	0	0	0	0	302	315	45	36	43
Bure Park Primary School	Bicester North Town Primary	2610	Primary	COM	60	70	67	67	42	56	61	63	60	0	0	0	0	0	0	416	480	60	45	48	
	Bicester South East Primary	3081	Primary	VC	20	15	8	8	16	11	6	10	7	0	0	0	0	0	0	66	105	15	12	12	
	Bicester South West Primary	3082	Primary	VA	0	30	30	24	20	16	21	23	15	0	0	0	0	0	0	149	210	30	37	30	
Finmere CE Primary School	Bicester North Villages Primary	3090	Primary	ACA	0	7	3	10	11	6	7	8	8	0	0	0	0	0	0	53	70	10	4	7	

Bicester

Schools	Planning Sub-area	Sector	School code	2020/21 (data correct as of May 2021)															2021/22			
				Published admission number			Total capacity			Total pupil numbers			First preference applications			Allocations						
Five Acres Primary School	Bicester South East Primary	Primary	2200	COM	60	60	43	55	43	42	52	42	58	0	0	0	0	335	420	60	48	49
Fringford CE Primary School	Bicester North Villages Primary	Primary	3083	VC	0	15	15	15	15	15	12	16	8	0	0	0	0	96	105	15	19	15
Fritwell CE Primary School	Bicester North Villages Primary	Primary	3065	VC	15	30	21	17	12	23	22	23	12	0	0	0	0	130	180	30	18	19
Gagle Brook Primary School	Bicester North Town Primary	Primary	2014	ACA	52	30	14	20	15	0	0	0	0	0	0	0	0	49	210	30	22	24
Glory Farm Primary School	Bicester North Town Primary	Primary	2211	ACA	52	60	42	35	44	42	60	59	56	0	0	0	0	338	420	60	45	48
King's Meadow Primary School	Bicester South West Primary	Primary	2210	COM	72	60	60	59	50	54	58	61	60	0	0	0	0	402	420	60	57	60
Langford Village Community Primary School	Bicester South East Primary	Primary	2608	COM	52	60	52	56	60	58	53	58	51	0	0	0	0	388	420	60	69	60
Launton CE Primary School	Bicester South East Primary	Primary	3085	VC	20	20	21	15	16	24	8	27	23	0	0	0	0	134	157	20	24	25
Longfields Primary and Nursery School	Bicester South East Primary	Primary	2207	COM	52	60	56	49	52	43	56	54	49	0	0	0	0	359	420	60	43	50
Southwold Primary School	Bicester North Town Primary	Primary	2607	ACA	84	60	39	30	36	34	35	43	43	0	0	0	0	260	420	60	46	48

Bicester															2021/22		
Schools	2020/21 (data correct as of May 2021)																
	Allocations																
	First preference applications		81		60		18		27		60		672		518		
	Published admission number		60		45		18		667		507		780		640		
	Total capacity		420		315		45		5507		4093						
	Total pupil numbers		370		228		315		4331		2944						
	Year 13 pupils		0		0		0		150								
	Year 12 pupils		0		0		0		175								
	Year 11 pupils		0		0		0		471								
	Year 10 pupils		0		0		0		494								
	Year 9 pupils		0		0		0		525								
	Year 8 pupils		0		0		0		557								
	Year 7 pupils		0		0		0		572								
	Year 6 pupils		34		32		0		609								
	Year 5 pupils		49		33		32		650								
	Year 4 pupils		52		46		32		626								
	Year 3 pupils		54		49		33		585								
	Year 2 pupils		60		60		32		593								
	Year 1 pupils		60		29		26		633								
	Reception pupils		0		0		0		635								
	Published admission number		61		30		787		715								
	Nursery places (PTE)		52		45		643										
	Type of school																
	Planning Sub-area																
	Sector																
	School code																
	Primary/Nursery Total																
	Secondary Total																
St Edburg's CE (VA) School	Bicester South West Primary	3505	Primary	VA	52	60	61	60	60	60	60	60	60	60	60	60	
St Mary's Catholic Primary School, Bicester	Bicester South West Primary	3824	Primary	VA	0	45	30	29	26	32	46	33	32	32	32	32	
Bicester Technology Studio	Bicester Secondary	4012	Secondary	STU	0	75	0	0	0	0	0	0	0	0	0	0	
The Bicester School	Bicester Secondary	4011	Secondary	ACA	0	240	0	0	0	0	0	0	0	0	0	0	
The Cooper School	Bicester Secondary	4032	Secondary	ACA	0	220	0	0	0	0	0	0	0	0	0	0	
Whitelands Academy	Bicester Secondary	4017	Secondary	ACA	0	120	0	0	0	0	0	0	0	0	0	0	
Primary/Nursery Total																	
Secondary Total																	

Area context, issues and strategy: Bloxham

Planning context	This area is affected by the planning policies of Cherwell District Council. This is a very rural area comprising small and medium sized villages, but directly adjoins the large town of Banbury; there is a pattern of movement of pupils out of Banbury into primary and secondary schools in this area.
Bloxham East Primary	<p>The east of the Bloxham area contains a number of larger villages which have been the main focus for local housing development in recent years. Schools in this area also attract pupils from Banbury or the Heyford direction.</p> <p>Christopher Rawlins [3453] expanded by 0.5 form entry from September 2017 to meet the needs of housing growth in Adderbury and the adjacent village of Deddington, not all of which is yet complete. The expansion of neighbouring Hook Norton Primary School (Chipping Norton planning area) provides flexibility given persistent excess demand for places at Bloxham Primary School.</p> <p>These expansions have currently provided sufficient capacity, but intakes are forecast to exceed capacity again by 2026. However, given the proximity of this area to large housing developments south of Banbury, it is expected that the additional school capacity planned for Banbury will prevent shortages occurring in Bloxham villages.</p>
Bloxham West Primary	In the absence of significant local housing development, schools in the western half of the planning area are very dependent on attracting Banbury children. Despite this, the area has surplus school places which are forecast to persist.
	Sibford Gower Primary School has revised its admission number from 20 to 15 for 2021 onwards.
Bloxham Secondary	<p>The secondary school in the area (The Warriner School) is at capacity, but this is partly due to it being a 1st preference school for out-of-catchment (Banbury) pupils. Despite its current expansion, the school is still over-subscribed.</p> <p>Population growth in Banbury is likely to increase demand for places in the short-term, however expansion of capacity within Banbury should ultimately reduce the pressure on places at The Warriner.</p> <p>The Warriner School [4007] has expanded by 2 forms of entry in two phases (2017 and 2019), largely to meet population growth in Banbury. It previously added a sixth form. The Warriner is explicitly part of the solution for Banbury growth.</p>

Schools		2020/21 (data correct as of May 2021)																	2021/22					
		Published admission number			Total capacity			Total pupil numbers			First preference applications			Allocations										
Planning Sub-area	School code	Sector	Type of school	Published admission number	Nursery places (PTE)	Reception pupils	Year 1 pupils	Year 2 pupils	Year 3 pupils	Year 4 pupils	Year 5 pupils	Year 6 pupils	Year 7 pupils	Year 8 pupils	Year 9 pupils	Year 10 pupils	Year 11 pupils	Year 12 pupils	Year 13 pupils	Total pupil numbers	Published admission number	Total capacity	First preference applications	Allocations
Bishop Carpenter CoE Aided Primary School	Bloxham West Primary	3302	Primary	ACA	0	16	15	11	15	12	13	16	16	0	0	0	0	0	0	98	112	16	16	16
Bloxham CoE Primary School	Bloxham East Primary	3064	Primary	VC	0	60	60	58	60	53	57	67	60	0	0	0	0	0	0	415	420	60	57	58
Christopher Rawns CoE (VA) Primary School	Bloxham East Primary	3453	Primary	ACA	52	45	36	45	31	37	29	32	32	0	0	0	0	0	0	242	315	45	33	38
Deddington CoE Primary School	Bloxham East Primary	3452	Primary	ACA	0	30	30	27	27	31	25	30	34	0	0	0	0	0	0	204	210	30	40	31
Dr Radcliffe's CoE Primary School	Bloxham East Primary	3828	Primary	ACA	0	30	19	30	24	30	28	30	30	0	0	0	0	0	0	191	210	30	39	31
Hornton Primary School	Bloxham West Primary	2001	Primary	ACA	40	15	7	16	14	8	8	16	8	0	0	0	0	0	0	77	105	15	9	10
Shenington CoE Primary School	Bloxham West Primary	5200	Primary	VA	0	15	13	15	11	12	16	17	12	0	0	0	0	0	0	96	105	15	11	11
Sibford Gower Endowed Primary School	Bloxham West Primary	3005	Primary	ACA	0	20	12	12	16	17	17	11	19	0	0	0	0	0	0	104	140	15	10	10

		2020/21 (data correct as of May 2021)										2021/22
		Allocations		9		214		284				
		First preference applications		8		294		223		294		
		Published admission number		15		284		241		284		
		Total capacity		105		1580		1722		1580		
		Total pupil numbers		85		1440		1512		1440		
		Year 13 pupils		0		66		73		66		
		Year 12 pupils		0		225		73		73		
		Year 11 pupils		0		259		253		225		
		Year 10 pupils		0		253		259		253		
		Year 9 pupils		0		259		259		259		
		Year 8 pupils		0		284		284		284		
		Year 7 pupils		0		280		280		280		
		Year 6 pupils		15		0		226		226		
		Year 5 pupils		11		0		230		230		
		Year 4 pupils		11		0		204		204		
		Year 3 pupils		12		0		212		212		
		Year 2 pupils		11		0		209		209		
		Year 1 pupils		12		0		226		226		
		Reception pupils		13		0		205		205		
		Published admission number		15		284		246		284		
		Nursery places (PTE)		0		284		92		92		
		Type of school										
		Sector										
		School code		3004		Primary		ACA		284		
		Planning Sub-area										
		Schools										
		Wroxton CoE Primary School		Bloxham West Primary		3004		Primary		ACA		
		The Warriner School		Bloxham Secondary		4007		Secondary		ACA		
		Primary Total										
		Secondary Total										

Area context, issues and strategy: Burford

Planning context	<p>This area is affected by the planning policies of West Oxfordshire District Council. The Burford planning area is very rural, with mostly small village primary schools, and a large secondary school that serves a wide area. There are no large areas of housing growth in the planning area, although even relatively small-scale housing can have a significant impact in the village context.</p>
	<p>This area adjoins the town of Carterton, where there is currently spare capacity, but significant planned housing growth. There are established patterns of pupil movement from Carterton into Burford area schools, which therefore frequently have more pupils than would be expected purely on local population</p>
	<p>This area is affected by MoD movements in Carterton, so numbers are volatile, and difficult to forecast.</p>
Burford North Primary	<p>Schools in this area are generally full, and the dip in Reception applications in 2021 is expected to be temporary. Village housing developments are expected to result in rising intakes, and from 2023 in particular there are expected to be very few spare Reception places.</p>
	<p>Following a recent development in Burford being approved on appeal, the county council worked with the Oxford Diocese to expand Burford Primary School from an admission number of 15 to one of 20 from September 2020. The school's site would not support further expansion. The site areas of the other schools in this area would also not support expansion.</p>
Burford South Primary	<p>Schools in this area are generally full, and the dip in Reception allocations in 2021 is expected to be temporary; from 2023 in particular there are expected to be very few spare Reception places. In this area Bampton has been the main focus of housing development, but the proximity to Carterton (where there is large-scale housing growth planned) will affect other schools in this area.</p>
	<p>In response to housing growth in Bampton, the village primary school [3131] expanded to 1 form entry in 2017. There is the possibility to expand the school further to 1.5fe in the longer term, should the local population continue to grow.</p>
Burford & Carterton Secondary	<p>For the purposes of planning secondary school capacity, Burford and Carterton are considered jointly, given that Burford's catchment area surrounds Carterton.</p> <p>Across the two schools, demand for places has risen in recent years, and there is forecast to be a low level of spare Year 7 places over the coming years. Burford School [4040] has proved consistently popular, and has reorganised how it uses its accommodation and installed temporary classrooms to increase its capacity to approximately 1,500 places (pending an updated capacity assessment). Carterton Community College [4041] has a previous history of significant spare places, but intakes are showing a rising trend.</p> <p>It is expected that Carterton Community College will need to expand to meet the significant housing growth in the town. The timescale for this depends on the progress of local housing development, and how quickly this affects secondary school numbers, and expansion may be several years from being required.</p>

Burford

Schools	Planning Sub-area	Sector	2020/21 (data correct as of May 2021)													2021/22	
			Total pupil numbers			Total capacity			Allocations			First preference applications			Published admission number		
Bampton CofE Primary School	Burford South Primary	3131	Primary	ACA	30	30	31	22	24	26	26	24	25	0	0	178	210
Brize Norton Primary School	Burford South Primary	2250	Primary	ACA	0	20	20	20	20	19	19	17	20	0	0	135	140
Burford Primary School	Burford North Primary	2251	Primary	ACA	30	20	20	14	12	16	17	12	16	0	0	107	140
Clanfield CofE Primary School	Burford South Primary	3100	Primary	VC	0	15	14	13	14	16	14	15	16	0	0	102	105
Leafield Church of England Primary School	Burford North Primary	3124	Primary	ACA	0	15	15	15	13	14	14	15	15	0	0	101	105
St Christopher's Church of England School	Burford South Primary	3555	Primary	ACA	0	22	15	20	23	19	19	14	20	0	0	130	150
St Kenelm's Church of England (VC) School	Burford North Primary	3125	Primary	VC	0	20	20	16	16	13	15	17	15	0	0	112	140

Area context, issues and strategy: Carterton

Planning context	<p>The Carterton planning area is confined to the town of Carterton, but is surrounded by the very rural planning area of Burford. There are established patterns of pupil movement from Carterton into Burford area schools, and Carterton schools therefore frequently have fewer pupils than would be expected purely on local population</p> <p>This area is strongly affected by MoD movements at the Brize Norton RAF base, so numbers are volatile, and difficult to forecast. The regular turnover of personnel distorts the usual patterns of cohorts moving up through the school years. This pattern of population change may change as more civilian housing development is built in the town.</p>
Carterton Primary	<p>This area is affected by the planning policies of West Oxfordshire District Council. The Local Plan allocates several large sites for housing development, including 700 homes at East Carterton (underway); 500 homes across the REEMA sites; and 270 across two other strategic sites. Much of the impact on pupil numbers of these developments will be beyond the time period covered by current pupil forecasts.</p> <p>Following a period of growth in primary school intakes, intakes dipped in 2019, since when intakes have been variable. Current forecasts indicate rising demand for Reception places over the next few years.</p>
Burford & Carterton Secondary	<p>A site for a new primary school has been secured within the East Carterton strategic housing development. Some of the existing schools also have potential to expand. The timescale for expansion of primary school capacity is kept under review as the local population grows.</p> <p>For the purposes of planning secondary school capacity, Burford and Carterton are considered jointly, given that Burford's catchment area surrounds Carterton.</p> <p>Across the two schools, demand for places has risen in recent years, and there is forecast to be a low level of spare Year 7 places over the coming years. Carterton Community College [4041] has a previous history of significant spare places, but intakes are showing a rising trend. Burford School [4040] has proved consistently popular and is operating at above its formal capacity as approved by the DfE in its academy funding agreement.</p> <p>It is expected that Carterton Community College will need to expand to meet the significant housing growth in the town. The timescale for this depends on the progress of local housing development, and how quickly this affects secondary school numbers, and expansion may be several years from being required.</p>

Carterton

Area context, issues and strategy: Chipping Norton

Planning context	<p>This area is affected by the planning policies of West Oxfordshire and Cherwell District Councils. The Chipping Norton planning area comprises the market town of Chipping Norton and its surrounding villages. Significant housing growth is planned for the town.</p> <p>In addition to primary and secondary schools, this area includes a maintained nursery school, The Ace Centre Nursery School [1019].</p>
Chipping Norton North Primary	<p>This area includes the town of Chipping Norton, as well as villages to the north. The town currently has surplus school places, but pupil numbers are forecast to grow as a result of significant planned housing development within Chipping Norton. Based on current forecasts, additional capacity may be required by 2026.</p> <p>Hook Norton Primary School [3044] expanded by 0.5 forms of entry to 1.5 form entry from 2015. This school has a catchment which overlaps that of Bloxham Primary School, and the expansion was partly to address housing development in Bloxham village, which could not be accommodated there.</p> <p>St Mary's CoE Primary School [3858] has reduced its admission number from 60 to 45 for 2021 onwards to better reflect the constraints of its physical accommodation.</p> <p>Further expansion of capacity in the area will be required due to the district's housing plans, including a large strategic development in the town, which is expected to include a new primary school.</p>
Chipping Norton South Primary	<p>This area comprises mostly small villages, where the demand for school can fluctuate significantly. While in recent years there have been some shortages of places at individual schools, and schools are mostly quite full, pupil forecasts indicate some surpluses of capacity may emerge in the coming years.</p>
Chipping Norton Secondary	<p>Intakes to Chipping Norton School are rising, but despite planned housing growth in the area, the forecast increase in demand for places is not expected to exceed the school's capacity. Some pupils from this area attend the Cotswold Academy outside the county (in Cirencester).</p>

Chipping Norton

Schools	Planning Sub-area	2020/21 (data correct as of May 2021)													2021/22			
		Allocations			First preference applications			Published admission number			Total capacity							
Total pupil numbers			Year 13 pupils			Year 12 pupils			Year 11 pupils			Year 10 pupils			Year 9 pupils			
The Ace Centre Nursery School	Chipping Norton Nursery	1019	Nursery	LA nursery school	78	n/a	0	0	0	0	0	0	0	0	0	n/a	n/a	n/a
Chadlington CE Primary School	Chipping Norton South Primary	3043	Primary	VC	0	15	15	15	14	15	11	16	14	0	0	100	105	15
Chadbury Primary School	Chipping Norton South Primary	2030	Primary	ACA	0	30	29	29	23	24	31	30	25	0	0	191	210	30
Enstone Primary School	Chipping Norton South Primary	2103	Primary	COM	0	15	12	13	7	19	16	16	13	0	0	96	105	15
Great Rollright CE (A) Primary School	Chipping Norton North Primary	3408	Primary	VA	0	15	15	19	12	15	16	15	12	0	0	104	105	15
Great Tew County Primary School	Chipping Norton South Primary	2104	Primary	COM	0	15	14	13	15	15	10	14	12	0	0	93	102	15
Holy Trinity Catholic School, Chipping Norton	Chipping Norton North Primary	3420	Primary	ACA	0	30	28	30	30	27	30	30	30	0	0	205	210	30

Chipping Norton

Area context, issues and strategy: Cumnor

Planning context	<p>This area is affected by the planning policies of both the Vale of White Horse District Council (VOWH) and Oxford City Council.</p> <p>This area has a lower concentration of housing growth than many in the county, although there are locally significant developments in Botley, Kennington and also in Southmoor (on the border of this planning area with Faringdon). In addition, schools here will be affected by significant housing growth planned in adjoining areas, in particular:</p> <ul style="list-style-type: none">• to the north of Abingdon;• in Eynsham, where there has historically been some pupil movement between the catchments of Bartholomew School and Matthew Arnold School;• Oxford City, given the proximity and easy access to schools in this area.
Cumnor Primary	<p>A number of primary schools in this area have previously increased their capacity and/or admission numbers in response to shortages of places in this area, and permitted housing developments, and for a time spare capacity remained below the county council's target levels.</p> <p>Additional pressure on places in this area has been caused by a previous shortage of places within Oxford; this is being alleviated as more school capacity is provided within the city, but a siblings legacy remains.</p> <p>Forecasts now indicate the recent decline in demand is expected to broadly continue. This may result in some surplus capacity.</p>
Cumnor Secondary	<p>Demand has risen sharply in this area, resulting in the need for Matthew Arnold School to expand by 1 form of entry in September 2017, increasing its annual admission number to 210; the necessary building work completed in 2019. Despite this expansion, Matthew Arnold School is at capacity for the 2021 Year 7 intake, with actual allocations above that forecast.</p> <p>Further expansion of another 1 form of entry may be required in future, but this will be kept under review, in the light of complex interactions between local planning areas, where large scale housing developments and recent or planned new schools will have a changing impact on pupil movements over the coming years.</p>

Area context, issues and strategy: DIDCOT

Planning context	<p>This area is affected by the planning policies of both the Vale of White Horse (VOWH) and South Oxfordshire (SODC) District Councils.</p> <p>Didcot has been a designated growth area since 1979 and has been the main focus for housing growth in South Oxfordshire (and also one of the foci in Vale of White Horse). The next 20 years are due to see 16,000 new homes created in the area. Didcot was granted Garden Town status by the government in 2015 to help plan for this growth. Northern and western extensions to the town are included in the SODC Core Strategy, with a further western extension included in the VOWH Local Plan, which has been recently adopted.</p> <p>There are also some housing developments within the surrounding villages which, while smaller-scale, will have a significant impact on the local primary schools.</p> <p>In addition to primary and secondary schools, this area includes a maintained nursery school, Lydalls Nursery [1017].</p>
Didcot North Primary	<p>Didcot is bisected by a major railway line, which hinders movement around the town, and pupils living north of the railway line nearly all choose to attend the two primary schools in this area of the town, All Saints CoE Primary School [3859] and Ladygrove Park Primary School [2609], although in some recent years these schools have been full, resulting in some families having to travel further. In addition, this area includes the small village school of Long Wittenham [3223].</p> <p>A large extension to Didcot is being built at NE Didcot, and some other housing developments are also planned or proposed for this area.</p> <p>To meet the needs of the housing growth in this area, the NE Didcot development includes sites for two primary schools and a secondary school. The first primary school is expected to open in 2023 or 2024, and the process to identify an academy sponsor has commenced. The timing of the second primary school will depend on the speed of housing delivery and the consequent population growth.</p>
Didcot South Town Primary	<p>This part of Didcot has seen large-scale housing growth in recent years at the Great Western Park development, with further growth due at the recently permitted Valley Park development, planned to deliver over 4,000 homes. In addition this area covers central Didcot where there are a number of redevelopment proposals.</p> <p>Great Western Park has particularly attracted young families, and the child population profile is currently heavily weighted towards younger primary and pre-school children. As the population matures, there will be continued growth in demand for primary school places, and then secondary school places. Due to sustained over-subscription at some town schools, some families in this area choose schools in the surrounding villages, including St Blaise CE Primary School [3260] listed in the Abingdon area.</p> <p>Two new primary schools have already opened in the Great Western Park development: Didcot Primary Academy [2012] in 2016 and Aureus Primary School [2011] in 2018. At least two further schools are expected to be required</p>

in the developments planned as further western extensions to Didcot, but no timescale for this is yet confirmed. Based on current pupil forecasts, the first school would be expected to be required by 2026 or 2027.

Manor School [2597] has reduced their admission number from 75 to 60, and therefore has an operational capacity of 420 rather than the 525 places stated in its funding agreement.

**Didcot
South
Villages
Primary**

Some villages in this area have also seen locally significant scales of housing growth, especially Chilton and Harwell, and some schools in this area have been repeatedly oversubscribed, with particular pressure currently experienced at Harwell, where there has been an accumulation of small-medium developments. These are largely now built, and it is hoped that pressure on school places will soon ease.

Chilton County Primary School [2555] has previously expanded from 1 form entry to 1.5 form entry. An assessment was made of the feasibility of expanding Harwell Primary School [3249], but this identified significant barriers to expansion. As such, no additional capacity is currently planned for this area, but new schools in the Valley Park development will in due course provide additional alternatives for this area.

**Didcot
Secondary**

Following on from the rapid population growth already seen in the local primary schools, demand for secondary places has risen rapidly in recent years in the Didcot area, and is forecast to continue to rise after a temporary lull in 2020/2021.

Until 2017 this area was served by two single sex schools, Didcot Girls' School [4139] and St Birinus School [4139], which effectively serve a wider area as the only single-sex options in the county. These did not have sufficient potential to expand to meet the very significant housing development which is planned and underway, although St Birinus School is increasing its admission number from 180 to 210 in 2022.

The opening of a co-educational school (Aureus School [4004]) in 2017 has created a temporary surplus of capacity, but this will fill as the local population grows and matures. It is also changing patterns of pupil movement, as previously pupils needed to travel to schools outside of Didcot if they wanted to attend a co-educational school. This has complicated the task of forecasting secondary pupil numbers in Didcot schools until the new patterns of movement become established.

In addition to Aureus Secondary School, a University Technical College, UTC Oxfordshire [4008] opened in 2015 providing specialist education to the 14-18 age range.

Another new secondary school is planned for the North East Didcot development; timescales are yet to be confirmed, but current forecasts indicate it may be required by 2026 or 2027.

Didcot

Schools	Planning Sub-area	School code	Sector	Type of school	2020/21 (data correct as of May 2021)															2021/22		
					Published admission number			Total capacity			Allocations			First preference applications			Published admission number			n/a		
Lydalls Nursery School	Didcot South Town Nursery	1017	Nursery	LA nursery school	136	n/a	1	0	0	0	0	0	0	0	0	0	1	n/a	n/a	n/a	n/a	
All Saints CE (A) Primary School	Didcot North Primary	3859	Primary	VA	52	60	53	55	49	54	59	60	56	0	0	0	0	386	420	60	53	57
Aureus Primary School	Didcot South Town Primary	2011	Primary	ACA	60	60	60	60	58	23	29	0	0	0	0	0	0	230	420	60	56	60
Blewbury CE Primary School	Didcot South Villages Primary	2031	Primary	ACA	0	25	12	5	21	24	17	23	17	0	0	0	0	119	175	25	9	12
Chilton County Primary School	Didcot South Villages Primary	2555	Primary	COM	26	45	44	42	34	46	40	29	24	0	0	0	0	259	315	45	37	43
Didcot Primary Academy	Didcot South Town Primary	2012	Primary	ACA	52	60	61	60	60	60	60	30	29	0	0	0	0	360	420	60	106	60
Hagbourne CE Primary School	Didcot South Villages Primary	3249	Primary	VC	0	30	30	30	29	30	30	30	30	0	0	0	0	209	204	30	37	30

Didcot

Schools		2020/21 (data correct as of May 2021)																2021/22		
		Allocations		First preference applications		Published admission number		Total capacity		Total pupil numbers		Year 11 pupils		Year 12 pupils		Year 13 pupils				
Page 150	Planning Sub-area	Sector		Type of school		Year 7 pupils		Year 8 pupils		Year 9 pupils		Year 10 pupils		Year 11 pupils		Year 12 pupils		Year 13 pupils		
		School code	Primary	COM	0	30	32	30	27	29	30	31	21	0	0	0	0	0	0	
		Harwell Primary School	Didcot South Villages Primary	2563	Primary	COM	0	30	32	30	27	29	30	31	21	0	0	0	0	0
		Lady Grove Park Primary School	Didcot North Primary	2609	Primary	ACA	26	60	60	59	58	57	59	60	56	0	0	0	0	0
		Long Wittenham CE Primary School	Didcot North Primary	3233	Primary	VC	0	15	9	15	9	11	11	15	12	0	0	0	0	0
		Manor Primary School	Didcot South Town Primary	2028	Primary	ACA	0	60	55	30	40	60	59	61	52	0	0	0	0	0
		Northbourne CE Primary School	Didcot South Town Primary	3852	Primary	ACA	52	45	45	45	44	44	45	45	39	0	0	0	0	0
		South Moreton Primary School	Didcot South Villages Primary	2566	Primary	ACA	0	25	11	21	19	13	21	25	15	0	0	0	0	0
		Stephen Freeman Community Primary School	Didcot South Town Primary	2594	Primary	COM	52	60	59	57	52	53	58	60	57	0	0	0	0	0

Didcot

2020/21 (data correct as of May 2021)																	2021/22			
Schools	Allocations																			
	First preference applications			Published admission number			Total capacity			Total pupil numbers			Year 13 pupils			Year 12 pupils				
Willowcroft Community School	Didcot South Town Primary	3912	Primary	ACA	78	60	59	57	57	59	55	58	52	0	0	397	420	60	48	52
Aureus School	Didcot Secondary	4004	Secondary	ACA	0	240	0	0	0	0	0	0	0	100	169	177	76	0	522	1200
Didcot Girls' School	Didcot Secondary	4139	Secondary	ACA	0	270	0	0	0	0	0	0	0	269	269	297	262	254	93	1593
St Birinus School	Didcot Secondary	4129	Secondary	ACA	0	180	0	0	0	0	0	0	0	172	177	140	135	170	51	1428
UTC Oxfordshire	Didcot Secondary	4008	Secondary	UTC	0	150	0	0	0	0	0	0	0	566	591	635	840	600	150	n/a
Primary/ Nursery Total					78	60	59	57	57	59	55	58	52	0	0	534	594	635	577	554
Secondary Total																		810	4821	

Area context, issues and strategy: Eynsham

Planning context	This area is affected by the planning policies of West Oxfordshire District Council. Many villages in this area have seen housing growth in recent years, in some cases of a scale significant to the village. Longer term, there is planned large-scale growth at Eynsham, with a new Garden Village due to be built alongside the village, and a major extension of the village planned to the west.
Eynsham Primary	<p>Births in this area have fluctuated in recent years, but there has been a downward trend in the Cassington area, and a distinct upward trend since 2018 in the Hanboroughs and Freeland area, where there is ongoing large-scale housing development. Eynsham town itself had a sharp dip in births in 2014, which is related to current Key Stage 1 numbers being lower than Key Stage 2, but births have since increased, followed in due course by Reception intakes.</p> <p>Demand for primary school places in this area is forecast to start growing strongly after 2024.</p> <p>Some village schools in the area have previously expanded due to pressure on places in rural areas: most recently, in 2021, Hanborough Manor Primary School [3147] expanded from 1 form entry to 1.5 form entry, and Stanton Harcourt [3130] expanded from an admission number of 15 to one of 20.</p> <p>The scale of development in Eynsham town is expected to require two new primary schools, which current forecasts indicate may be needed from 2028 onwards, but this timescale will depend on the progress of the housing development.</p>
Eynsham Secondary	<p>Bartholomew School [4054] is consistently popular and oversubscribed. The school has already expanded by one form of entry as the first phase of meeting the need which will be generated by local population growth. As this is ahead of the bulk of the impact from housing growth, in the meantime it has had space to accommodate some non-catchment children. As the local population grows, non-catchment applicants are likely to be displaced back into their local schools. The school is now accommodating post-16 students from Heyford Park School, following that school's movement into the same Trust (see Bicester area).</p> <p>Bartholomew has previously expanded to the limit the Trust considers compatible with their site area, which comprises a constrained main site and a detached sports pitch. The Garden Village development next to Eynsham will require significant additional capacity, and the Trust has applied to the Regional Schools Commissioner to expand onto a satellite site within the Garden Village, the timing of which will depend on the delivery of the related housing.</p>

2020/21 (data correct as of May 2021)															2021/22	
Schools		Planning Sub-area		Sector		Type of school		Total pupil numbers		Total capacity		Allocations		First preference applications		
Eynsham Community Primary School	Eynsham Primary	2013	Primary	ACA		Year 13 pupils	301	420	52	52	132	132	132	132	132	217
Freeland Church of England Primary School	Eynsham Primary	3208	Primary	ACA	0	Year 12 pupils	60	60	52	52	130	130	130	130	130	236
Hanborough Manor CofE School	Eynsham Primary	3147	Primary	ACA	0	Year 11 pupils	148	148	60	60	181	181	181	181	181	210
St Peter's Church of England Primary School, ^{Page 153} Seacington	Eynsham Primary	3651	Primary	ACA	15	Year 10 pupils	204	204	157	157	210	210	210	210	210	27
Stanlake Church of England Primary School	Eynsham Primary	3127	Primary	ACA	26	Year 9 pupils	96	96	15	15	14	14	14	14	14	27
Stanton Harcourt CofE Primary School	Eynsham Primary	3130	Primary	ACA	20	Year 8 pupils	123	123	15	15	15	15	15	15	15	27
Bartholomew School	Eynsham Secondary	4054	Secondary	ACA	0	Year 7 pupils	209	209	105	105	105	105	105	105	105	27
Primary/ Nursery Total						Year 6 pupils	108	108	157	157	210	210	210	210	210	27
Secondary Total						Year 5 pupils	210	210	210	210	210	210	210	210	210	27
						Year 4 pupils	204	204	210	210	210	210	210	210	210	27
						Year 3 pupils	204	204	210	210	210	210	210	210	210	27
						Year 2 pupils	209	209	210	210	210	210	210	210	210	27
						Year 1 pupils	211	211	211	211	211	211	211	211	211	27
						Reception pupils	148	148	148	148	148	148	148	148	148	27
						Published admission number	168	168	168	168	168	168	168	168	168	27
						Nursery places (PTE)	152	152	152	152	152	152	152	152	152	27
							150	150	150	150	150	150	150	150	150	27
							124	124	124	124	124	124	124	124	124	27
							118	118	118	118	118	118	118	118	118	27
							119	119	119	119	119	119	119	119	119	27
							210	210	210	210	210	210	210	210	210	27

Area context, issues and strategy: Faringdon

Planning context	<p>This area is affected by the planning policies of the Vale of White Horse District Council (VOWH).</p> <p>This area comprises Faringdon and surrounding villages, where in recent years there have been significant local concentrations of housing growth, which is still continuing.</p> <p>In addition to housing growth, Shrivenham and Watchfield primary schools and Faringdon Community College have been affected by RAF personnel movements resulting from the closure of RAF Lyneham, with families being rehoused in this area until sufficient accommodation could be provided close to RAF Brize Norton (Carterton planning area). These schools are also subject to high pupil turnover as they serve overseas students at the Defence Academy, on 1-2 year courses, many of whom bring their families with them. As students arrive after initial allocations, it is vital that some spare capacity is maintained at these schools, but this has been increasingly challenging in years when the local population has grown.</p>
Faringdon Primary	<p>Due to local concentrations of housing development, especially in Faringdon, Shrivenham and Kingston Bagpuize with Southmoor, demand for school places is rising.</p> <p>Within Faringdon town itself, places at the Infant and Junior Schools [2561, 2562] were reduced in recent years due to problems with accommodation, now rectified.</p> <p>Conversion of the Infant and Junior schools to primary schools was approved by the Regional Schools Commissioner in April 2021. A new school is being built within a large housing development for the Infant School to move into, allowing it to extend its age range to be a primary school; at the same time the Junior School will also become a primary school, increasing the combined capacity from 3 forms of entry to 4 forms of entry. The schools will change their names to Folly View Primary School (on the new site) and The Elms Primary School (on the current junior school site).</p> <p>John Blandy Primary School [3230] in the village of Kingston Bagpuize with Southmoor expanded from 1 form entry to 1.5 form entry in 2020. Despite this, forecasts indicate continued pressure on school places as a result of local housing development. Some of this pressure can be met through the expansion to 0.5 form entry in 2020 of Longworth Primary School [3234] in an adjoining village. Further expansion of capacity in this area would not be possible without acquiring more school site area.</p> <p>The county council is working closely with the Faringdon Learning Trust (the multi-academy trust responsible for most schools in this area) to relocate Shrivenham CE Primary School [3239] onto a new site within a housing development, which would enable it to expand from 1 form entry to 1.5 form entry. It is hoped this will be completed in 2023/24. The school is currently on a very constrained site, with no dedicated playing field.</p>

Previous expansion of capacity in this area includes:

- Longcot & Fernham [3232] increased in admission number from 17 to 20 in 2017 using space freed up when a preschool relocated off-site.

- Watchfield [2572] was expanded from 1.5 form entry to 2 form entry, and in addition a 'bulge' class was required in 2017 as demand for places fluctuates due to proximity to the Defence Academy.

Faringdon Secondary

Secondary pupil numbers in this area are rising, and demand is forecast to continue to grow. Despite the expansion of Faringdon Community College it is expected to be over-subscribed, but some of this demand is currently from outside the local area. As the local population grows as a result of housing development, pupils from outside the catchment area will be less able to secure a place at the school, and pressure will be displaced to other schools. Of particular relevance is the planned opening of a new school in the Wantage planning area at Grove Airfield (secondary phase due to open 2024), which will become an alternative choice for some villages which have previously looked towards Faringdon for secondary education.

The school also currently attracts some pupils from Swindon, where there is major housing growth planned, but sufficient additional school capacity will need to be provided in Swindon as the school's capacity is only expected to be sufficient for its local area.

Faringdon Community College opened a new building in September 2018, which enabled the school to expand to 9 form entry in 2019. This capacity is currently partly dependent on temporary accommodation, for which funding is being sought to replace with permanent. The school may potentially increase again to 10 form entry in the longer term, but its site and location may make this difficult.

Faringdon															2021/22										
Schools		2020/21 (data correct as of May 2021)													Allocations										
		Published admission number			First preference applications			Total capacity			Allocations			Allocations											
Planning Sub-area	Sector	School code	Type of school	Nursery places (PTE)	Published admission number	Reception pupils	Year 1 pupils	Year 2 pupils	Year 3 pupils	Year 4 pupils	Year 5 pupils	Year 6 pupils	Year 7 pupils	Year 8 pupils	Year 9 pupils	Year 10 pupils	Year 11 pupils	Year 12 pupils	Year 13 pupils	Total pupil numbers	Published admission number	First preference applications	Total capacity	Allocations	Allocations
Ashbury with Compton Beauchamp CoE (A) Primary School	Faringdon Primary	3851	Primary	VA	0	15	21	6	9	12	6	14	12	0	0	0	0	0	0	80	90	15	7	7	
Buckland CE Primary School	Faringdon Primary	3222	Primary	ACA	11	15	16	16	15	18	15	15	12	0	0	0	0	0	0	107	105	15	17	15	
Faringdon Infant School	Faringdon Primary	2561	Primary	ACA	52	75	75	74	88	0	0	0	0	0	0	0	0	0	0	237	270	90	77	60	
Faringdon Junior School	Faringdon Primary	2562	Primary	ACA	0	90	0	0	0	82	80	86	89	0	0	0	0	0	0	337	360	90	3	17	
John Blandy Primary School	Faringdon Primary	3230	Primary	ACA	0	45	44	44	30	27	32	30	32	0	0	0	0	0	0	239	315	45	38	38	
Longcot and Fernham CE Primary School	Faringdon Primary	3232	Primary	ACA	16	20	20	20	20	21	20	19	19	0	0	0	0	0	0	139	140	20	18	20	
Longworth Primary School	Faringdon Primary	3234	Primary	VC	0	10	10	13	4	7	11	12	11	0	0	0	0	0	0	68	105	15	12	12	
Shellingford CE (VA) School	Faringdon Primary	3853	Primary	VA	0	15	15	14	15	15	12	12	15	0	0	0	0	0	0	98	105	15	19	15	
Shrivenham CE Controlled School	Faringdon Primary	3239	Primary	ACA	0	30	31	25	30	29	20	22	28	0	0	0	0	0	0	185	210	30	28	30	
Watchfield Primary School	Faringdon Primary	2572	Primary	ACA	26	60	57	46	54	52	57	37	45	0	0	0	0	0	0	348	420	60	43	43	

		2021/22	
	Allocations	268	257 268
	First preference applications	262	262 262
	Published admission number	270	395 270
	Total capacity	1550	2120 1550
	Total pupil numbers	1351	1838 1351
	Year 13 pupils	80	80
	Year 12 pupils	85	85
	Year 11 pupils	230	230
	Year 10 pupils	209	209
	Year 9 pupils	232	232
	Year 8 pupils	262	262
	Year 7 pupils	253	253
	Year 6 pupils	0 263	263
	Year 5 pupils	0 247	247
	Year 4 pupils	0 253	253
	Year 3 pupils	0 263	263
	Year 2 pupils	0 265	265
	Year 1 pupils	0 258	258
	Reception pupils	0 289	289
	Published admission number	270 375	375 270
	Nursery places (PTE)	0 105	105
	Type of school		
Schools			
Faringdon Community College	Faringdon Secondary	4141	Secondary
	Sector		
	School code		
	Planning Sub-area		

Area context, issues and strategy: Henley

Planning context	<p>This planning area comprises the market town of Henley and the nearby village of Shiplake. While there is some housing development approved or planned in this area, delivery of house building has been slower than previously projected.</p> <p>This area is affected by the planning policies of South Oxfordshire District Council, but also adjoins Buckinghamshire and Wokingham.</p>
Henley Primary	<p>Births in this area have been falling overall since 2016, and this, combined with slow housing delivery, has resulted in a forecast of declining demand for primary school places after 2021, and of sustained surplus capacity in this area. However, pupil forecasting in this area has previously been complicated by a pattern of families moving out from London into the existing housing stock, which can increase pupil numbers living in the area faster than would be forecast based on housing growth and births data.</p> <p>Following several years when there was a shortage of Reception places in Henley, Badgemoor Primary School [2513] was expanded. Demand for places in Henley then fell, creating surplus capacity. If the local pupil population does not rise, action may be required to address the surplus places at some schools.</p>
Henley Secondary	<p>The pupil numbers in the cohorts due to transfer over the next few years from local feeder primary schools are forecast to decline, but Gillotts School [4055] attracts from outside its catchment, and in some cases from outside the county, and overall demand is forecast to remain high.</p> <p>As some pupils currently travel from Reading, Gillotts School may be affected by the planned new secondary school in Reading. There is inevitably uncertainty over the scale of impact that the new school will have but the current forecast is that demand for places will fall slightly after 2023, but that the school will stay close to full capacity.</p> <p>The school is not expected to expand, but the academy trust has an ambitious planned programme of building works to improve the condition and suitability of its accommodation.</p>

Henley

Schools	2020/21 (data correct as of May 2021)															2021/22		
	Allocations			First preference applications			Published admission number			Total capacity			Total pupil numbers					
Badgmore Primary School	Henley Primary	2513	Primary	COM	0	30	14	20	0	101	210	210	155	16	27	139	200	
Sacred Heart Catholic Primary School	Henley Primary	3820	Primary	VA	0	30	21	25	19	21	29	0	0	0	0	144	223	
Shiplake CE School	Henley Primary	3810	Primary	VA	0	28	21	15	11	18	26	31	26	0	0	163	180	
Trinity CE Primary School	Henley Primary	3254	Primary	VC	0	45	45	45	44	43	41	43	46	0	0	45	59	
Valley Road School	Henley Primary	2512	Primary	COM	0	30	16	30	29	30	29	30	26	0	0	35	30	
Gillotts School	Henley Secondary	4055	Secondary	ACA	0	180	0	0	0	0	0	0	0	0	0	180	223	
Primary/ Nursery Total																		
Secondary Total																		
Planning Sub-area																		
School code																		
Sector																		

Area context, issues and strategy: Kidlington

Planning context	<p>This area is affected by the planning policies of Cherwell District Council. This area has seen little housing growth in recent years, and at the same time births have been falling; as a result schools have been experiencing falling demand for places. In the Cherwell Local Plan there is now large-scale housing growth allocated for the edges of this area, between the south of Kidlington and north Oxford, and extending into Yarnton and Begbroke (Woodstock planning area). This will have some effect on primary schools in this area and significant effects for the secondary school, but the full effect will not be felt until beyond the time period covered by current pupil forecasts.</p>
Kidlington Primary	<p>There is currently some surplus capacity in schools in this area due to recent lower birth rates. Intakes at some schools have fluctuated significantly year-to-year.</p> <p>During an earlier period of high demand for school places, Edward Feild Primary School was approved to expand to 2 forms of entry. When the local population dipped, this school reduced its admission number back to 45 temporarily. The expected pupil generation from the housing now planned at South East Kidlington (430 homes) and Stratfield Farm (120 homes) would be accommodated by completing Edward Feild's expansion, which requires further building work.</p>
Kidlington Secondary	<p>This area has seen falling demand for secondary school places in recent years. Gosford Hill School [4060] has been well located to address past pressure on secondary school places in surrounding areas, but the opening in recent years of new secondary schools in Bicester and Oxford has resulted in those areas now having sufficient school places. As a result, the school currently has surplus capacity. The concentration of planned housing growth around Kidlington will in due course significantly increase demand for secondary school places, but this will inevitably take some time, and the impact will not be felt on pupil numbers until beyond the time period covered by current forecasts.</p> <p>Gosford Hill School has reduced its admission number from 180 to 150 for 2021 onwards, until the local secondary pupil population grows again.</p> <p>Longer term, the expected pupil generation from the large scale of housing planned across Kidlington, north of Oxford, Yarnton and Begbroke will be met through a combination of increasing pupil numbers at Gosford Hill and new school accommodation, with a secondary school site included within the Begbroke development area. (Expansion of Marlborough School in Woodstock, which currently serves Begbroke, would also be required for Woodstock housing growth in the West Oxfordshire Local Plan). As this and the wider area has a complex pattern of housing growth and school capacity expansion, at this stage the timing and exact scale of necessary school capacity expansion cannot be confirmed, but any new school is unlikely to be required before the end of the decade.</p>

Kidlington

Area context, issues and strategy: OXFORD

Planning context

This area is affected by the planning policies of the Oxford City Council. The Local Plan 2016-2036 includes 11,000 new homes dispersed across the city, with the largest concentrations in Barton and Wolvercote. However, so far housing delivery has not been fast enough to outweigh a sustained fall in births across the city.

The scale of housing growth which can be accommodated within the city boundaries does not meet all of Oxford's identified needs. The surrounding districts include further significant housing growth aimed at meeting Oxford's unmet housing need. In Cherwell district and South Oxfordshire, some of these sites adjoin the city boundary and will affect schools in this planning area.

Schools on the edge of the city in surrounding planning areas accommodate some city children, and have been vital in helping to meet the demand for places in recent years, in particular Botley Primary School [3223], West Oxford Primary School [2533] and St Swithun's Primary School [3258] (Cumnor area); and Sandhills Primary School [2401] and village schools in the Wheatley area.

As well as primary, secondary and special schools, Oxford includes four maintained Nursery Schools: Comper Foundation Stage School [1005]; Grandpont Nursery School [1010]; Headington Quarry Nursery School [1006]; and Slade Nursery School [1011].

Oxford Central Primary

Demand for Reception places in this area has fallen in recent years. In addition, there has been a pattern of movement out of the area affecting older cohorts. These trends have combined to result in surplus school capacity. Pupil forecasts do not show growth in this part of Oxford, although due to the concentration of schools in Oxford, changing patterns of parental preference can lead to unforeseen changes in the rolls of individual schools.

In addition to several expansions in the mid-2010s, further primary capacity was created by using redundant LA office accommodation adjoining St Gregory the Great (secondary) School [4014] to add a primary phase to the school in 2013. This primary school has now split from the secondary phase and become St Frideswide's CE Primary School [2037]. A free school, Tyndale Community School [2008] also opened 2013.

New Hinksey Primary School [3213] has revised its admission number from 28 to 25, and St Francis Church of England Primary School [3253] has revised its admission number from 40 to 30, in both cases for 2022 onwards to better reflect the constraints of their physical accommodation. Further reductions in admission numbers at some schools may be appropriate to provide greater stability until the local population grows again.

Oxford East Primary

Following a period of falling demand for school places in this area, demand is now forecast to grow again, as this area has one of the main concentrations of housing growth in the city. In the meantime, there has been some surplus capacity, which is being managed by Bayards Hill School and New Marston Primary School reducing their admission numbers from 60 to 30 for 2022 onwards. Current forecasts indicate that this will provide sufficient Reception places until 2027, but the situation will be reviewed annually as the impact of local housing development unfolds.

There were numerous school expansions in the period up to 2016, since when there has been sufficient capacity overall. The schools physically capable of permanent expansion have already been expanded.

Barton Park Primary School [2034] opened in 2020 to serve a large new housing development. With an initial intake of 15 children per year, its accommodation will accommodate 45 children per year. The site provides potential for the school to grow to an intake of 60 if required by local population growth.

St Andrew's School [3211] previously took "bulge" classes at the height of the pressure on primary school places in Oxford, which was accommodated by using off-site accommodation for the Reception class, but now intends to return to a constant admission number of 30. When the current bulge class leaves the school, it will return to a capacity of 210 in 2024/25.

There is significant planned housing growth in South Oxfordshire adjoining this area, at Bayswater and Northfield, and planning for school capacity will take into account the potential for existing schools to support this growth.

Oxford North Primary

There have been some significant fluctuations in demand for school places in this area over recent years, but growth is now forecast due to significant housing development to the north of Oxford, which will not have had its full impact on schools during the current forecast period.

Cutteslowe [2004] and Wolvercote [2534] Schools have both previously been expanded to meet the increase in demand for places in this area. The potential for further expansion of Wolvercote to 2fe has been explored and may require a split site.

Based on the current expected speed of delivery of housing in this area, additional primary school capacity may be required by the end of the decade, but the timing of this will be kept under review as further data becomes available. In the short term there is expected to be some surplus capacity, and it may be appropriate for this to be managed through reduced admission numbers at some schools until the local population grows.

There is significant planned housing growth in the Cherwell district adjoining this area, which is expected to require a new primary school just north of Oxford, as the existing schools are not expected to have any significant scope for meeting the resulting population growth.

Oxford South Primary

Demand for Reception places in this area has fallen in recent years. In addition, there has been a pattern of movement out of the area affecting older cohorts. These trends have combined to result in surplus school capacity. Pupil forecasts show only gradual growth in this part of Oxford, although this area has experienced high levels of turnover of pupils in the past, and can therefore be difficult to forecast.

Several local schools were expanded in the early-mid 2010s. Since experiencing falling intakes, Windale Primary School [2025] has reduced their PAN from 60 to 30. Further reductions in admission numbers at some schools may be appropriate to provide greater stability until the local population grows again.

There is significant planned housing growth in South Oxfordshire adjoining this area, and planning for school capacity will take into account the potential for existing schools to support this growth.

Oxford Secondary

There has been rising demand for secondary school places in Oxford in recent years, as the population growth which previously created pressure in primary schools ages. Secondary transfers are expected to peak in 2022, after which there will be a lull as the more recent fall in birth rates feeds through. In the longer term, housing growth in and around Oxford will push secondary pupil numbers back up, but this will be beyond the time frame of the current pupil forecast.

Large gaps in popularity between the city's secondary schools have meant that pupils not getting their first preference school have often travelled out of the city, e.g. to Kidlington, Cumnor and Eynsham, but these patterns are changing due to increased availability of places within the city.

To meet the needs of the growing population, Cheney School [4120] has previously expanded by 1fe to a PAN of 270, with capital investment, and Oxford Spires Academy [6907] has increased its admission number from 210 to 220 in its existing accommodation.

The Swan School opened with a 4-form entry intake in temporary accommodation in September 2019, but has now occupied its permanent site and has expanded to take 6 forms of entry from 2021 onwards.

St Gregory the Great School [4014] has reduced its admission number from 210 to 150 for 2022 onwards, following its conversion from an all-through school to a secondary-only school.

Current school capacity is expected to be sufficient for the scale of housing growth within the city's boundaries, but the large-scale growth around the city is expected to require a new secondary school on the outskirts of Oxford.

Oxford

Schools	Planning Sub-area	2020/21 (data correct as of May 2021)														2021/22		
		Total capacity			Allocations			First preference applications			Published admission number			n/a				
Total pupil numbers			Year 13 pupils			Year 12 pupils			Year 11 pupils			Year 10 pupils			Year 9 pupils			
Year 8 pupils			Year 7 pupils			Year 6 pupils			Year 5 pupils			Year 4 pupils			Year 3 pupils			
Year 2 pupils			Year 1 pupils			Reception pupils			Published admission number			Nursery places (PTE)			Sector			
Nursery			Type of school			Sector			Published admission number			Nursery			School code			
Schools			Type of school			Sector			Published admission number			Nursery			School code			
Comper Foundation Stage School	Oxford Central Nursery	1005	Nursery	LA nursery school	78	n/a	0	0	0	0	0	0	0	0	0	n/a	n/a	n/a
Grandparent Nursery School	Oxford Central Nursery	1010	Nursery	LA nursery school	140	n/a	0	0	0	0	0	0	0	0	0	n/a	n/a	n/a
Headington Quarry Foundation Stage School	Oxford East Nursery	1006	Nursery	LA nursery school	146	n/a	0	0	0	0	0	0	0	0	0	n/a	n/a	n/a
Slade Nursery School	Oxford East Nursery	1011	Nursery	LA nursery school	156	n/a	0	0	0	0	0	0	0	0	0	n/a	n/a	n/a
Barton Park Primary School	Oxford East Primary	2034	Primary	ACA	n/a	15	14	5	5	0	0	0	0	0	0	0	24	315
Bayards Hill School	Oxford East Primary	2015	Primary	ACA	0	60	31	45	39	30	55	54	47	0	0	0	301	420
Church Cowley St James CE Primary School	Oxford South Primary	3210	Primary	VC	100	60	60	59	56	53	60	56	59	0	0	0	403	420
Cuttleslowe Primary School	Oxford North Primary	2004	Primary	ACA	142	60	35	53	36	42	44	47	45	0	0	0	302	420

Oxford

Schools	Planning Sub-area	Sector	Published admission number	Type of school	Published admission number	Nursery places (PTE)	Reception pupils	Year 1 pupils	Year 2 pupils	Year 3 pupils	Year 4 pupils	Year 5 pupils	Year 6 pupils	Year 7 pupils	Year 8 pupils	Year 9 pupils	Year 10 pupils	Year 11 pupils	Year 12 pupils	Total pupil numbers	Published admission number	First preference applications	Allocations	2021/22		
Oxford Primary School	Oxford Central Primary	2525	Primary	COM	52	45	40	35	44	31	36	43	34	0	0	0	0	0	0	0	0	263	315	45	25	27
John Henry Newman Academy	Oxford South Primary	2000	Primary	ACA	64	60	52	44	41	32	43	43	45	0	0	0	0	0	0	0	0	300	420	60	30	32
Larkrise Primary School	Oxford Central Primary	2027	Primary	ACA	52	60	50	50	52	55	53	60	58	0	0	0	0	0	0	0	0	378	420	60	56	59
New Hinksey CE Primary School	Oxford Central Primary	3213	Primary	VC	20	28	18	21	25	17	22	22	17	0	0	0	0	0	0	0	0	142	175	28	21	23
New Marston Primary School	Oxford East Primary	2020	Primary	ACA	0	60	31	31	43	29	48	61	48	0	0	0	0	0	0	0	0	291	420	60	28	37
Orchard Meadow Primary School	Oxford South Primary	2024	Primary	ACA	52	60	26	27	37	42	44	42	50	0	0	0	0	0	0	0	0	268	420	60	30	30
Our Lady's Roman Catholic Primary School	Oxford Central Primary	3836	Primary	ACA	52	45	45	36	38	28	39	44	44	0	0	0	0	0	0	0	0	274	315	45	35	40
Pegasus School	Oxford South Primary	2593	Primary	ACA	94	60	50	59	60	57	57	58	61	0	0	0	0	0	0	0	0	402	420	60	47	47
Rose Hill Primary School	Oxford South Primary	2023	Primary	ACA	78	60	33	36	28	42	29	48	41	0	0	0	0	0	0	0	0	257	420	60	26	27

Oxford

Oxford

Schools	Planning Sub-area	2020/21 (data correct as of May 2021)															2021/22																										
		Total capacity			Allocations			First preference applications			Published admission number			2021/22																													
Total pupil numbers		Year 13 pupils		Year 12 pupils		Year 11 pupils		Year 10 pupils		Year 9 pupils		Year 8 pupils		Year 7 pupils		Year 6 pupils		Year 5 pupils		Year 4 pupils		Year 3 pupils		Year 2 pupils		Year 1 pupils		Reception pupils		Published admission number		Nursery places (PTE)		Type of school		Sector		School code		Planning Sub-area		Schools	
St Joseph's Catholic Primary School, Oxford	Oxford East Primary	3838	Primary	VA	0	60	52	55	60	56	60	59	55	0	0	0	0	0	0	0	0	0	0	0	0	0	0	397	416	60	54	60											
St Mary and John CE Primary School	Oxford Central Primary	3834	Primary	VA	0	60	57	58	60	60	53	60	58	0	0	0	0	0	0	0	0	0	0	0	0	0	0	406	420	60	59	60											
St Michael's CofE Primary School	Oxford East Primary	3216	Primary	VA	0	30	30	26	30	25	29	27	27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	194	210	30	26	27											
St Nicholas' Primary and Nursery School	Oxford East Primary	2352	Primary	COM	72	60	46	49	58	59	59	59	51	0	0	0	0	0	0	0	0	0	0	0	0	0	0	381	420	60	44	45											
St Philip and James' CE (A) Primary School	Oxford North Primary	3835	Primary	VA	0	60	59	58	60	56	53	59	59	0	0	0	0	0	0	0	0	0	0	0	0	0	0	404	420	60	55	56											
Tyndale Community School	Oxford Central Primary	2008	Primary	ACA	0	60	38	50	57	58	51	61	51	0	0	0	0	0	0	0	0	0	0	0	0	0	0	366	420	60	40	45											
Windale Primary School	Oxford South Primary	2025	Primary	ACA	78	30	19	23	28	25	24	42	29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	190	420	30	21	20											
Windmill Primary School	Oxford East Primary	2527	Primary	COM	0	90	88	88	89	90	89	88	87	0	0	0	0	0	0	0	0	0	0	0	0	0	0	619	630	90	130	90											

Oxford

2020/21 (data correct as of May 2021)															2021/22					
Schools		Planning Sub-area		Sector		Type of school		Published admission number		Nursery places (PTE)		Published admission number		Allocations						
														First preference applications	Published admission number					
														Total capacity						
Wolvercote Primary School	Oxford North Primary	2534	Primary	ACA	39	45	44	42	43	45	40	43	0	0	301	315	45	45		
WoodTerm Primary School	Oxford East Primary	2589	Primary	COM	0	60	59	53	59	57	58	60	55	0	0	401	420	60	37	52
Cheney School	Oxford Secondary	4120	Secondary	ACA	0	270	0	0	0	0	0	0	0	270	269	270	230	285	1081	1227
Oxford Spires Academy	Oxford Secondary	6907	Secondary	ACA	0	220	0	0	0	0	0	0	0	221	219	214	222	122	1331	1350
St Gregory the Great	Oxford Secondary	4014	Secondary	ACA	0	210	0	0	0	0	0	0	0	76	149	73	118	159	57	65
The Cherwell School	Oxford Secondary	4116	Secondary	ACA	0	270	0	0	0	0	0	0	0	271	285	284	285	269	378	305
The Oxford Academy	Oxford Secondary	4019	Secondary	ACA	0	210	0	0	0	0	0	0	0	206	200	196	152	35	41	1036
The Swan School	Oxford Secondary	4016	Secondary	ACA	0	120	0	0	0	0	0	0	0	116	120	0	0	0	0	236
Primary/ Nursery Total																				
Secondary Total																				

Area context, issues and strategy: Sonning Common

Planning context	<p>This rural area comprises a number of small-medium sized villages. Levels of housing growth in this area are generally low.</p> <p>This area is affected by the planning policies of South Oxfordshire District Council, but also adjoins the border with Reading, across which there is significant cross-border pupil movement, especially in the secondary age range. Changes in school provision in Reading and Wokingham, for example new schools or housing growth, could affect demand for places in this area.</p>
Sonning Common Primary	<p>As is typical with small village schools, intakes can fluctuate significantly from year to year. The level of births has fluctuated in this area, with a relative peak in 2017 which is forecast to increase primary school intakes in 2022. In general, however, there is surplus primary school capacity in this area.</p> <p>No additional capacity is currently required in this area. The current layout and suitability of Sonning Common Primary School's [2506] accommodation restricts its ability to provide the necessary curriculum spaces in line with its admission number.</p> <p>Peppard Primary School [3205] has developed a scheme to relocate to a new site, subject to capital funding becoming available.</p>
Sonning Common Secondary	<p>Maiden Erlegh Chiltern Edge [4013] plays a key role in providing secondary school places for families living within the Caversham and Emmer Green area in north Reading and from September 2012 the area of Reading which is north of the River Thames (Caversham) has been in the designated area of Maiden Erlegh. There is a current shortage of secondary school places in the north of Reading, which results in increased allocations of pupils to Maiden Erlegh. Despite this, Maiden Erlegh currently has significant surplus places.</p> <p>A new secondary school is due to open in Reading in 2023, which will in part serve the north Reading area, and is expected to reduce the need for Reading pupils to travel to Maiden Erlegh. There is inevitably uncertainty over the scale of impact that the new school will have, but it is expected that demand for places at Maiden Erlegh from Reading families could fall significantly.</p>

Sonning Common

Schools	2020/21 (data correct as of May 2021)										2021/22	
	Allocations		First preference applications		Published admission number		Total capacity		Total pupil numbers			
Kidmore End Church of England Primary School	Sonning Common Primary	3807	Primary	ACA	0	30	29	23	25	25	182	210
Peppard Church of England Primary School	Sonning Common Primary	3205	Primary	VC	0	15	7	14	15	16	94	105
Sonning Common Primary School	Sonning Common Primary	2506	Primary	COM	0	60	52	46	52	49	375	409
Maiden Erleigh Chiltern Edge	Sonning Common Secondary	4013	Secondary	ACA	0	120	0	0	0	0	355	355
Primary/ Nursery Total											651	724
Secondary Total											0	980

Area context, issues and strategy: Thame

Planning context	This area is affected by the planning policies of South Oxfordshire District Council, and also adjoins Buckinghamshire, which has a particular impact on secondary school places. The South Oxfordshire Core Strategy allocates 775 homes to Thame by 2027, sites for which have been allocated in the Thame Neighbourhood Plan which was adopted in 2013. The next Neighbourhood Plan is expected to allocate sites for a further 339 new homes. In addition, the village of Chinnor has seen significant housing growth.
Thame Town Primary	The south of the town has seen the bulk of housing completions so far, and births here have been rising since 2016, although this is partly balanced by slightly falling births across the rest of the town. As a result, primary school pupil numbers have been rising in recent years, and by 2022 the town's primary schools are expected to have little or no spare Reception capacity. GP data indicates that since 2019 births have fallen in the town, which should reduce pressure on primary schools, but this trend needs to be confirmed when the Office for National Statistics releases full 2020 births data.
Thame Villages Primary	In recent years, to meet planned housing growth, John Hampden Primary School [2591] has been expanded to 2 forms of entry, with Barley Hill Primary School [2462] increasing its intake to 90 in previously built accommodation. It is not thought that the town's schools have potential for further expansion of capacity, and therefore until local population growth subsides, there could be pressure on primary school places.
Thame Secondary	The largest village in this area, Chinnor, has seen significant housing growth which has attracted many young families to the village, resulting in a rapid rise in primary school numbers. Births data indicates a peak in births in 2019 which is likely to put particular pressure on school places in due course. GP data indicates that 2020 may have seen fewer births, but this trend needs to be confirmed when the Office for National Statistics releases full 2020 births data. There is forecast to be sustained pressure on places in this area. In 2019, St Andrew's Chinnor [3182] expanded from 1.5 form entry to 2 form entry, since when nearly all spaces have been filled. Mill Lane Community Primary School [2465] is almost mostly full. The small village school of Tetsworth [2456] is exploring options to grow slightly despite a very cramped site.

The Academy is expanding to a permanent annual intake of 350 pupils, and a total capacity of 2,250, subject to approval by the Regional Schools Commissioner.

It is not expected that Lord Williams's would expand further than already planned; given the growth in the catchment population, this is expected to limit the ability of future non-catchment pupils to secure places at the school.

Thame

Schools	Planning Sub-area	School code	Sector	2020/21 (data correct as of May 2021)																2021/22				
				Allocations				First preference applications				Published admission number				Total capacity								
Total pupil numbers				Year 13 pupils				Year 12 pupils				Year 11 pupils				Year 10 pupils				Year 9 pupils				
Year 8 pupils				Year 7 pupils				Year 6 pupils				Year 5 pupils				Year 4 pupils				Year 3 pupils				
Year 2 pupils				Year 1 pupils				Reception pupils				Published admission number				Nursery places (PTE)				Type of school				
Primary/ Nursery Total				Sector				School code				Planning Sub-area				Schools				Page 74				
Secondary Total																								
Aston Rowant CE Primary School	Thame Villages Primary	3180	Primary	VC	0	15	15	11	6	15	6	11	6	15	6	10	8	8	6	12	15	14		
Barley Hill Primary School	Thame Town Primary	2463	Primary	COM	0	90	66	74	73	59	64	86	84	0	0	0	0	0	0	0	506	1865		
John Hampden Primary School	Thame Town Primary	2591	Primary	COM	52	60	60	59	60	57	60	60	60	0	0	0	0	0	0	0	416	2177		
Mill Lane Community Primary School	Thame Villages Primary	2465	Primary	COM	52	30	30	30	31	30	28	30	23	0	0	0	0	0	0	0	202	2177		
St Andrew's CE Primary School	Thame Villages Primary	3182	Primary	VC	0	60	60	60	54	61	61	60	52	0	0	0	0	0	0	0	408	1865		
St Joseph's Catholic Primary School, Thame	Thame Town Primary	3826	Primary	ACA	0	30	30	30	30	23	29	29	30	0	0	0	0	0	0	0	201	2177		
Tetsworth Primary School	Thame Villages Primary	2456	Primary	COM	15	8	12	6	12	8	8	10	6	0	0	0	0	0	0	0	62	1865		
Lord Williams's School	Thame Secondary	4580	Secondary	ACA	0	350	0	0	0	0	0	0	0	0	0	0	0	0	0	0	350	1865		

Area context, issues and strategy: Wallingford

Planning context	<p>This planning area comprises the market town of Wallingford and surrounding villages. It is affected by the planning policies of South Oxfordshire District Council.</p> <p>As well as a concentration of housing growth in Wallingford town, there is a locally significant scale of housing underway or planned in Benson, Cholsey and Crowmarsh Gifford.</p>
Wallingford Primary	<p>Primary school capacity has been under pressure in this area for several years, requiring a number of school expansions. Demand is forecast to continue to rise due to recent and proposed housing developments.</p> <p>Within Wallingford town, the county council is working with the Oxford Diocesan Schools Trust to relocate St Nicholas CE Infant School [3244] as part of a major housing development, and extend the age ranges of both this and Fir Tree Junior School [2578] to become full primary schools. The current target completion date for the new school building is 2024.</p> <p>In the villages, in 2020 Cholsey Primary School [2596] expanded from 1.5 form entry to 2 form entry. Benson CE Primary School [3181] expanded in 2019 from 1 form entry to 1.5 form entry, for which an additional playing field has been secured from an adjoining housing development.</p>
Wallingford Secondary	<p>Recent rapid growth in local primary numbers, along with planned/permited housing growth, has required secondary school expansion. Wallingford School's catchment overlaps that of Icknield Community College in Watlington.</p> <p>Wallingford School [4140] is expanding in line with local population. The school's admission number increased from 190 to 216 in 2019, and will increase again to 242 on completion of their accommodation in 2022. The school is not expected to be able to expand further, and current forecasts indicate there may be a shortage of places from 2026 onwards. The planned new secondary school in north east Didcot may help address any pressure on places in this area.</p>

Wallingford

Wallingford												2021/22																						
												Allocations																						
												First preference applications	29	2021/22																				
												Published admission number	45	2021/22																				
												Total capacity																						
												Total pupil numbers																						
												Year 13 pupils	0	2021/22																				
												Year 12 pupils	0	2021/22																				
												Year 11 pupils	0	2021/22																				
												Year 10 pupils	0	2021/22																				
												Year 9 pupils	0	2021/22																				
												Year 8 pupils	0	2021/22																				
												Year 7 pupils	0	2021/22																				
												Year 6 pupils	0	2021/22																				
												Year 5 pupils	0	2021/22																				
												Year 4 pupils	0	2021/22																				
												Year 3 pupils	0	2021/22																				
												Year 2 pupils	0	2021/22																				
												Year 1 pupils	0	2021/22																				
												Reception pupils	0	2021/22																				
												Published admission number	0	2021/22																				
												Nursery places (PTE)	0	2021/22																				
												Type of school	0	2021/22																				
												Sector	0	2021/22																				
												School code	0	2021/22																				
												Planning Sub-area	0	2021/22																				
												Page	0	2021/22																				
												Benson CE Primary School	Wallingford Primary	3181	Primary	ACA	32	45	40	43	30	30	30	30	29	0	232	315	45	29	32			
												Brightwell-Cum-Sotwell CE Primary School	Wallingford Primary	3221	Primary	ACA	0	20	17	25	19	14	17	14	15	0	0	0	0	121	140	30	22	25
												Cholsey Primary School	Wallingford Primary	2596	Primary	ACA	0	60	60	40	48	49	35	33	33	0	0	0	0	298	420	60	38	42
												Crowmarsh Gifford CE School	Wallingford Primary	3200	Primary	VC	0	30	30	30	30	30	28	29	31	0	0	0	0	208	210	30	33	30
												Fir Tree Junior School	Wallingford Primary	2578	Primary	ACA	0	60	0	0	56	56	47	47	0	0	0	0	206	240	60	n/a	n/a	
												St John's Primary School	Wallingford Primary	2567	Primary	ACA	0	30	30	30	28	30	30	24	27	0	0	0	0	199	210	30	43	29
												St Laurence CE (A) School	Wallingford Primary	3760	Primary	VA	0	15	15	15	15	15	10	16	7	0	0	0	0	93	105	15	11	13

Wallingford

												2021/22					
												Allocations	48	207	219	207	
												First preference applications	42	210	218	210	
												Published admission number	60	216	330	216	
												Total capacity					
												Total pupil numbers	168	180	1322	1820	1322
												Year 13 pupils	0	122			
												Year 12 pupils	0	150			
												Year 11 pupils	0	193			
												Year 10 pupils	0	205			
												Year 9 pupils	0	195			
												Year 8 pupils	0	226			
												Year 7 pupils	0	218			
												Year 6 pupils	0	218			
												Year 5 pupils	0	193			
												Year 4 pupils	0	206			
												Year 3 pupils	0	224			
												Year 2 pupils	0	226			
												Year 1 pupils	52	56			
												Reception pupils	60	60			
												Published admission number	0	252			
												Nursery places (PTE)	21	60	320	216	
												Type of school	0	53			
												Sector					
												School code					
												Planning Sub-area					
												Schools					

Area context, issues and strategy: Wantage

Planning context	This area is affected by the planning policies of Vale of White Horse District Council. The Wantage planning area comprises the market town of Wantage in the south, the large and rapidly growing village of Grove in the north, and the smaller villages surrounding both. It has been, and continues to be, a major focus for housing growth in the area, with large developments at Grove Airfield, north of Grove, and NE of Wantage, as well as smaller developments which collectively are having a significant impact on schools.
Wantage North Primary	<p>Demand for primary school places is forecast to grow rapidly in this area due to large scale housing growth around Grove, as well as smaller but locally significant developments at East and West Hanney to the north and Stanford in the Vale to the east. To meet this growth a mixture of new and expand primary schools are required.</p> <p>The Grove Airfield development is intended to total 2,500 homes; an all-through primary and secondary “free school”, to be called the St John’s Academy, has been approved for this development, provisionally due to open in 2023 for the primary phase and 2024 for the secondary phase. The primary phase will have 2 forms of entry; a second primary school is also planned within the development, but current forecasts indicate this will not be needed until the end of the decade, although this may change based on the speed of delivery of new housing.</p> <p>Grove CE Primary School [3228] has previously expanded from 0.5 form entry to 1 form entry; to expand further additional site area was required, and this has now been secured via a Section 106 legal agreement relating to the adjacent Monks Farm housing development. This provides sufficient site area for the school to expand to 2 forms of entry as required by local population growth.</p> <p>Stanford in the Vale Primary School [3240] is expected to have insufficient capacity to meet the needs of local housing growth, but its constrained site has complicated expansion planning, and acquisition of additional land is required.</p> <p>St James, East Hanney [3225] has previously expanded from 0.5 form entry to 1 form entry, and is not expected to expand further.</p>
Wantage South Primary	<p>Demand for primary school places is forecast to grow rapidly in this area due to large scale housing growth centred on Wantage.</p> <p>A new school opened in 2020 in NE Wantage. Wantage Primary Academy [2033] within the Kingsgrove housing development. Operating in the first instance at 1 form entry, this will grow to 2 forms of entry in line with local population growth.</p> <p>The county council is working with the Vale Academy Trust on a capital project to provide additional accommodation at St Nicholas CE Primary School in East Challow.</p> <p>Other schools in this area have constrained sites which would make them difficult to expand if there were to be local population growth.</p>
Wantage Secondary	<p>There is currently one large secondary school in this area, King Alfred’s Academy [4142]. This was previously split across three sites but following a</p>

major ESFA/S106-funded site development programme it now operates across two sites. There needs to be a full review of capacity as a result, and it is expected that the new capacity will be approximately 1,740 places, in line with an admission number of 290.

As a result of the large-scale housing growth in this area, demand for secondary school places is forecast to grow rapidly over the coming years. In the short term this has been moderated by a new secondary school in Didcot, to the east, and expansion of Faringdon Community College, to the west, as these provide alternative options for villages in between these towns. As both Faringdon and Didcot are also major areas of growth, over time they will be less able to absorb pressure from the Wantage area.

To give local residents confidence that they would be able to secure a place at King Alfred's, in recent years the academy has been operating with an artificially high admission number. In the longer term the new all-through school at Grove Airfield will provide the necessary additional capacity. In the first instance, the new school's secondary phase will be 4 forms of entry, allowing King Alfred's to return to an admission number of 290. The new school is expected to need to expand to meet the full scale of local housing growth, but this is not currently expected to be required until towards the end of the decade.

The new school and King Alfred's will both be operated by the same multi-academy trust. The new school is not currently expected to include a sixth form, with post-16 provision instead being provided at King Alfred's.

Wantage

Schools	School code	Sector	2020/21 (data correct as of May 2021)													2021/22						
			Allocations			First preference applications			Published admission number			Total capacity										
Charlton Primary School	Wantage South Primary	2573	Primary	ACA	0	60	59	60	60	60	59	60	0	0	0	418	420	60	42	47		
Grove CE School	Wantage North Primary	3228	Primary	ACA	0	30	23	30	21	30	31	34	27	0	0	0	196	210	30	29	30	
Millbrook Primary School	Wantage North Primary	2016	Primary	ACA	52	60	56	56	58	62	46	60	56	0	0	0	394	420	60	52	55	
St Amand's Catholic Primary School	Wantage South Primary	3855	Primary	VA	0	28	18	11	12	23	16	28	17	0	0	0	125	150	28	11	13	
St James CE Primary School, Hanney	Wantage North Primary	3225	Primary	ACA	24	30	24	29	30	25	19	32	13	0	0	0	172	210	30	25	25	
St Nicholas CofE Primary School	Wantage South Primary	3224	Primary	ACA	13	15	15	11	16	15	8	17	5	0	0	0	0	87	105	15	15	15
Stanford In the Vale CofE Primary School	Wantage North Primary	3240	Primary	VC	0	30	30	30	30	30	27	30	28	0	0	0	0	205	210	30	22	24
Stockham Primary School	Wantage South Primary	2583	Primary	COM	0	30	29	30	29	30	30	30	30	0	0	0	0	208	210	30	48	30

Planning Sub-area

Wantage										2021/22	
Schools		Sector		Allocations		First preference applications		Published admission number		2021/22	
The Hendreds CE School	Wantage South Primary	3250	Primary	ACA	0	18	18	18	18	20	9
The Ridgeway CE (C) Primary School	Wantage South Primary	3231	Primary	VC	0	14	15	14	15	20	15
Uffington CE Primary School	Wantage North Primary	3251	Primary	VC	15	15	15	13	13	15	15
Wantage CE Primary School	Wantage South Primary	3246	Primary	ACA	60	60	50	60	59	60	59
Wantage Primary Academy	Wantage South Primary	2033	Primary	ACA	60	25	20	6	6	0	0
King Alfred's	Wantage Secondary	4142	Secondary	ACA	0	390	0	0	0	376	376
Primary/ Nursery Total						415	415	415	415	420	390
Secondary Total						224	224	224	224	2579	1641
2020/21 (data correct as of May 2021)											
Total capacity		126		144		94		105		15	
Year 13 pupils		0		0		0		0		152	
Year 12 pupils		0		0		0		0		197	
Year 11 pupils		0		0		0		0		283	
Year 10 pupils		0		0		0		0		261	
Year 9 pupils		0		0		0		0		249	
Year 8 pupils		0		0		0		0		260	
Year 7 pupils		0		0		0		0		239	
Year 6 pupils		0		0		0		0		342	
Year 5 pupils		0		0		0		0		401	
Year 4 pupils		0		0		0		0		344	
Year 3 pupils		0		0		0		0		377	
Year 2 pupils		0		0		0		0		371	
Year 1 pupils		0		0		0		0		368	
Reception pupils		0		0		0		0		376	
Published admission number		22		18		15		14		15	
Nursery places (PTE)		0		0		0		0		390	
Type of school											
School code											
Planning Sub-area											

Area context, issues and strategy: Watlington

Planning context	<p>This rural planning area comprises the small town of Watlington and a number of small-medium villages. There have been some locally-significant housing developments approved or planned in this area, especially at Watlington (sites for 238 homes identified in the Neighbourhood Plan) and Chalgrove (sites for 320 homes identified in the Neighbourhood Plan).</p> <p>The large village of Chinnor lies between Watlington and Thame. For school planning purposes Chinnor is included in the Thame planning area, but the village lies in the overlapping catchment areas of Icknield Community College in Watlington and Lord Williams's School in Thame. Chinnor has seen significant housing growth, not all of which is yet complete.</p> <p>The area also includes the RAF base at Benson, which means there can be high turnover and unpredictability of pupil numbers. Although this can mean there are sometimes space places at RAF Benson School, these cannot be considered available to meet growth pressures from outside the base, as the school needs to retain the ability to respond to short-notice influxes of families. As the school is within the secure boundary of the RAF base, this makes it more difficult for non-military families to attend the school.</p>
Watlington Primary	<p>This area is affected by the planning policies of South Oxfordshire District Council, whose Local Plan includes a strategic development site for 3,000 homes at Chalgrove Airfield.</p> <p>As is common in small village schools, intakes can vary significantly from year to year, although schools in this area have generally been more stable than many villages.</p> <p>Births in this area have been falling overall since 2015, although there was a sharp increase in 2018, followed by another dip in 2019. As a result, there has been some surplus capacity, but pupil numbers are forecast to start rising after 2021 as a result of the locally significant scale of housing growth. A shortage of Reception places is forecast from 2025 onwards, based on current admission numbers.</p> <p>Watlington Primary School reduced its admission number for 45 to 30 in 2021 to manage the dip in local population. The housing growth in the village is expected to result in a need for this admission number to soon go back up again, but the timing of this will depend on the speed of delivery of new housing.</p> <p>An initial options appraisal of the potential for Chalgrove Primary School to expand indicated that it would be challenging to do so, due to the school's site constraints. A local dip in births has reduced the urgency of expansion, which forecasts now indicate would not be needed until 2026. A decision on whether to proceed with expansion is on hold pending further clarity about the Chalgrove Airfield development.</p> <p>The strategic redevelopment of Chalgrove Airfield would be expected to require two new primary schools. The timing and size of these will depend on whether Chalgrove Primary School expands in the meantime, as well as on the progress of the Airfield development.</p>

Watlington Secondary

Icknield Community College in Watlington serves not only the schools in this planning area, but also those in Chinnor, which lies in an overlap of catchment areas with Lord Williams's School in Thame. Icknield has experienced rapid growth in pupil numbers in recent years, exceeding its previous capacity in 2019. Pupil numbers are forecast to continue to grow, but the speed and scale of growth will depend on the progress of local housing growth, especially that planned at Chalgrove Airfield.

To meet the needs of local housing growth, Icknield Community College was approved by the Regional Schools Commissioner in 2021 to expand from its previous capacity of 700 places to 850 places. In the first instance this is being achieved using temporary accommodation, until there is further clarity over the Chalgrove Airfield development. This has enabled the school to increase its admission number from 140 to 170 for 2021 onwards.

The school's current site area is under the recommended size for an 850-place school, and an additional playing field area is being sought as part of legal agreements with an adjoining housing development.

In the longer term, if the Chalgrove Airfield development progresses, the intention is to relocate Icknield Community College to the Chalgrove Airfield site, which would enable it to expand further, including adding a sixth form, and also resolve condition and suitability issues relating to its current accommodation. The expected size of the school in that case would be 1,500 places. The "in principle" approval of the Regional Schools Commissioner, on behalf of the Secretary of State, has already been granted for this, subject to the relocation being fully funded.

If the Chalgrove Airfield development does not make progress, a permanent accommodation solution for Icknield Community College on its current site would be required.

Watlington

2020/21 (data correct as of May 2021)													2021/22		
Schools	Allocations		First preference applications		Published admission number		Total capacity		Total pupil numbers		Year 13 pupils		Year 12 pupils		
	Chalgrove Community Primary School	Watlington Primary	2452	Primary	ACA	26	30	21	29	30	27	0	0	185	210
	Ewelme CofE Primary School	Watlington Primary	3752	Primary	VA	0	13	14	14	14	12	0	0	86	90
	Lea Knor CE Primary School	Watlington Primary	3184	Primary	VC	0	15	15	9	15	11	12	11	85	90
	RAF Benson Community Primary School	Watlington Primary	2450	Primary	COM	0	45	32	30	28	33	31	20	191	240
	Stadhampton Primary School	Watlington Primary	2455	Primary	ACA	0	15	15	3	14	12	14	13	85	105
	Watlington Primary School	Watlington Primary	2459	Primary	ACA	60	45	28	32	30	19	32	38	217	315
	Icknield Community College	Watlington Secondary	4082	Secondary	ACA	0	140	0	0	0	0	0	0	726	700
	Primary/ Nursery Total													849	726
	Secondary Total													1050	700

Area context, issues and strategy: Wheatley

Planning context	<p>This rural planning area comprises a number of small-medium villages, and also extends to the outskirts of Oxford at Sandhills. As such, the area is affected by not only the planning policies of South Oxfordshire District Council, but also some pupil movement into or out of Oxford.</p> <p>Significant housing growth is expected in Wheatley, largely through the redevelopment of the former Oxford Brookes University campus, but there is no significant housing growth in other parts of this area.</p> <p>In addition, this area has experienced falling births in recent years.</p>
Wheatley Primary	<p>In addition to primary and secondary schools, this area includes a maintained nursery school, Wheatley Nursery School [1031].</p> <p>As is common in small village schools, intakes can vary significantly from year to year. The combination of falling births and lack of housing growth has resulted in falling primary school intakes in recent years, and there is currently surplus primary school capacity in this area. This is forecast to be sustained, even after pupil numbers start to grow again, which is currently expected to be from 2024 onwards.</p> <p>Wheatley CE Primary School [2009] shares a site with Wheatley Nursery School and the primary phase of John Watson (special) School.</p> <p>Wheatley CE Primary School was previously expanded to 2 forms of entry, and as a result is expected to have sufficient capacity to meet the needs of the currently planned scale of housing growth in Wheatley.</p> <p>Sandhills Community Primary School [2022] has previously varied its admission number between 30 and 60 in order to respond to pressure on school places, in particular emerging from Oxford. Now that Oxford city has sufficient primary school places, the need for Sandhills to admit higher intakes has been removed.</p> <p>Given the expectation of sustained surplus capacity, reductions in admission numbers at some schools may be appropriate to provide greater stability until the local population grows again.</p>
Wheatley Secondary	<p>Wheatley Park School [4077] has a funding agreement capacity of 1,350, which is greater than required for its current admission number of 180. It has previously operated with an admission number of 210. It is likely that the school will be oversubscribed for the 2022 intake, as this corresponds to the peak cohort in primary schools. After that, the school's current admission number of 180 is expected to be sufficient for the period covered by current pupil forecasts.</p> <p>Based on current forecasts, there is no current need for this school to expand.</p>

Wheatley

Wheatley										2021/22	
Schools		2020/21 (data correct as of May 2021)									
		Allocation		First preference applications		Published admission number		Total capacity			
Sandhills Community Primary School	Wheatley Primary	2022	Primary	ACA	0	30	27	30	43	30	30
Wheatley CE Primary School	Wheatley Primary	2009	Primary	ACA	0	60	43	39	25	36	30
Wheatley Park School	Wheatley Secondary	4077	Secondary	ACA	0	180	0	0	0	174	180
Primary Nursery Total		180		180		180		180			
Secondary Total											
Planning Sub-area		Type of school									
Sector											
School code											

Area context, issues and strategy: Witney

Planning context	This area comprises the large market town of Witney and schools in surrounding villages. It is affected by the planning policies of West Oxfordshire District Council, and has long been the main focus for housing growth in the district. One large housing development (1,000 homes at West Witney) is underway, along with a number of smaller developments. The Local Plan allocates two further strategic development sites at East Witney (450 homes) and North Witney (1,400 homes). The delivery of these sites will extend well beyond the time period covered by current pupil forecasts.
Witney North Primary	Previous pressure on school places in the North Witney area has eased, and forecasts indicate that demand is expected to continue to fall until planned large-scale housing development in the area starts generating additional pupils in the second half of this decade.
	This area includes the planned 1,400 home development in NE Witney, where a new school is expected to be required. The timescale for this is not yet known.
	In the meantime, Madley Brook Primary School [2002] has reduced its annual intake from 45 to 30 to better reflect the changing local population profile.
Witney South Primary	This area has seen the bulk of Witney housing growth in recent years, and pupil numbers are forecast to grow over the coming years.
	Schools in this area include St Mary's Church of England Controlled Infant School [3207] which only covers the younger ages; at Year 3 pupils transfer to a primary school, in most cases going to The Batt Church of England Voluntary Aided Primary School [3605] which is therefore 1 form entry at Reception and Key Stage 1, and 2 form entry at Key Stage 2.
	West Witney Primary School [2601] was previously expanded from 1.5 form entry to 2 form entry to meet the need for places ahead of a new school opening in the large housing development on the west of Witney. That school, Windrush CE Primary School [2038], opened September 2021, built to accommodate 1.5 form entry in the first instance (accepting 1fe initially) but with site area sufficient for 2 form entry should this be required to meet local population growth. Due to slower than expected population growth, this area has some short-term surplus capacity, but this will reduce as the new housing is fully occupied.
Witney Secondary	Secondary pupil numbers in Witney are on a rising trend, and this will continue as the population moving into new housing matures. In the short term, demand for Year 7 places is forecast to peak in 2023, when there could be a shortage of places based on the school's current admission numbers. After that there is expected to be a temporary dip in local population before it rises again in the second half of the decade. However, the adjoining secondary school planning areas of Burford and Eynsham are forecast to be over-subscribed, which may result in greater pressure on places in Witney being sustained.
	A site for a potential new secondary school has been protected within the large development to the west of Witney. Based on the latest data, it is now expected that the local need for school places can be met through expansion of the existing schools' capacity, rather than requiring a new school.

Witney

Schools		2020/21 (data correct as of May 2021)																		2021/22																											
		Published admission number		First preference applications		Allocations																																									
Page 9	Planning Sub-area	Total capacity		Total pupil numbers		Year 13 pupils		Year 12 pupils		Year 11 pupils		Year 10 pupils		Year 9 pupils		Year 8 pupils		Year 7 pupils		Year 6 pupils		Year 5 pupils		Year 4 pupils		Year 3 pupils		Year 2 pupils		Year 1 pupils		Reception pupils		Published admission number		Nursery places (PTE)		Type of school		Sector		School code		Planning Sub-area		Witney	
		Aston and Cote CoE Primary School	Witney South Primary	3120	Primary	VC	0	25	22	29	22	31	23	18	15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	160	175	25	30	27													
		Ducklington Primary School	Witney South Primary	3122	Primary	VC	105	30	24	29	27	30	32	32	28	0	0	0	0	0	0	0	0	0	0	0	0	0	0	202	208	30	21	21													
		Finstock CE Primary School	Witney North Primary	3040	Primary	ACA	20	15	5	5	8	3	11	2	11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	45	105	15	4	4													
		Hailley CE Primary School	Witney North Primary	3123	Primary	VC	30	15	10	12	15	14	16	15	12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	94	105	15	20	15													
		Mealey Brook Community Primary School	Witney North Primary	2002	Primary	ACA	48	45	33	31	43	41	45	41	46	0	0	0	0	0	0	0	0	0	0	0	0	0	0	280	315	30	33	30													
		North Leigh CE (C) School	Witney North Primary	3128	Primary	ACA	0	30	26	25	27	29	29	27	23	0	0	0	0	0	0	0	0	0	0	0	0	0	0	186	210	30	19	20													
		Our Lady of Lourdes Catholic Primary School, Witney	Witney South Primary	3822	Primary	ACA	0	30	27	22	22	29	27	28	25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	180	210	30	26	28													
		Queen Emma's Primary School	Witney South Primary	2304	Primary	ACA	0	45	34	30	22	25	40	29	42	0	0	0	0	0	0	0	0	0	0	0	0	0	0	222	315	45	9	12													
		St Mary's CE Controlled Infant School	Witney South Primary	3207	Primary	ACA	0	30	28	30	27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	85	90	30	19	23														
		The Batt CE (VA) Primary School*	Witney South Primary	3605	Primary	ACA	0	30	27	30	29	58	58	60	56	0	0	0	0	0	0	0	0	0	0	0	0	0	0	318	316	30	39	30													
		The Blake CE Primary School	Witney North Primary	3600	Primary	ACA	0	60	45	35	46	59	64	55	61	0	0	0	0	0	0	0	0	0	0	0	0	0	0	365	420	60	48	48													

Witney

*Up to 30 additional children are admitted into Year 3 of The Batt CE (VA) Primary School each year to accommodate transfer from St Mary's CE Infants School

Area context, issues and strategy: Woodcote

Planning context	<p>This rural planning area comprises a number of small-medium sized villages which in most cases have seen only low levels of housing growth. The village of Goring is the main focus of growth with the Neighbourhood Plan allocating sites for approximately 94 new homes.</p> <p>This area is affected by the planning policies of South Oxfordshire District Council, but also adjoins West Berkshire and Reading.</p>
Woodcote Primary	<p>As is common in small village schools, intakes can vary significantly from year to year. Births in this area have been falling steadily since 2014, which has resulted in falling primary school intakes. As a result, there is currently surplus capacity. There has been some increase in births since 2017 in the southern part of this planning area – Goring, Whitchurch and Woodcote - and Reception intakes are forecast to grow slowly after 2024, but spare places in the area as a whole are forecast to be sustained.</p> <p>However, this area in the past has grown faster than forecasts based on housebuilding and births alone, as it can attract families moving out from London. Careful monitoring of pupil numbers is therefore necessary.</p> <p>Based on current pupil forecasts, there is no need for additional capacity in this area.</p>
Woodcote Secondary	<p>Langtree School is consistently oversubscribed and is operating above its funding agreement capacity of 591, with 621 pupils on roll in 2021.</p> <p>The academy has identified the need for another classroom to ease strain on its accommodation, and is developing a capital project to address this.</p> <p>Although the school is over-subscribed, there are spare places at schools in the wider area, and given the lack of forecast population growth, there is no current evidence that the school needs to expand further.</p>

Woodcote															2021/22			
Schools	2020/21 (data correct as of May 2021)																	
	Total pupil numbers			Allocations			First preference applications			Published admission number			Total capacity					
	Year 13 pupils	0	0	Year 13 pupils	0	0	Year 13 pupils	0	0	Year 13 pupils	0	0	Year 13 pupils	0	0	Year 13 pupils	0	0
	Year 12 pupils	0	0	Year 12 pupils	0	0	Year 12 pupils	0	0	Year 12 pupils	0	0	Year 12 pupils	0	0	Year 12 pupils	0	0
	Year 11 pupils	0	0	Year 11 pupils	0	0	Year 11 pupils	0	0	Year 11 pupils	0	0	Year 11 pupils	0	0	Year 11 pupils	0	0
	Year 10 pupils	0	0	Year 10 pupils	0	0	Year 10 pupils	0	0	Year 10 pupils	0	0	Year 10 pupils	0	0	Year 10 pupils	0	0
	Year 9 pupils	0	0	Year 9 pupils	0	0	Year 9 pupils	0	0	Year 9 pupils	0	0	Year 9 pupils	0	0	Year 9 pupils	0	0
	Year 8 pupils	0	0	Year 8 pupils	0	0	Year 8 pupils	0	0	Year 8 pupils	0	0	Year 8 pupils	0	0	Year 8 pupils	0	0
	Year 7 pupils	0	0	Year 7 pupils	0	0	Year 7 pupils	0	0	Year 7 pupils	0	0	Year 7 pupils	0	0	Year 7 pupils	0	0
	Year 6 pupils	0	0	Year 6 pupils	0	0	Year 6 pupils	0	0	Year 6 pupils	0	0	Year 6 pupils	0	0	Year 6 pupils	0	0
Checkendon CE (A) Primary School	Woodcote Primary	3801	Primary	VA	0	30	23	24	24	25	29	30	27	0	0	0	0	0
Goring CE Primary School	Woodcote Primary	3803	Primary	VA	0	20	15	25	20	21	12	18	15	0	0	0	0	0
Nettlebed Community School	Woodcote Primary	2504	Primary	COM	0	7	8	4	3	5	7	7	7	0	0	0	0	0
South Stoke Primary School	Woodcote Primary	2507	Primary	COM	0	15	15	9	14	11	10	16	10	0	0	0	0	0
Stoke Row CofE Primary School	Woodcote Primary	3206	Primary	VA	0	15	15	9	14	11	10	16	10	0	0	0	0	0
Whitchurch Primary School	Woodcote Primary	2208	Primary	COM	0	20	19	21	20	18	20	21	16	0	0	0	0	0
Woodcote Primary School	Woodcote Primary	2510	Primary	COM	0	30	18	27	22	24	28	22	30	0	0	0	0	0
Langtree School	Woodcote Secondary	4094	Secondary	ACA	0	120	0	0	0	0	0	0	0	120	0	0	0	0
Primary/ Nursery Total																		
Secondary Total																		
Planning Sub-area	School code	Sector	Type of school															

Area context, issues and strategy: Woodstock

Planning context	<p>This area is affected by the planning policies of West Oxfordshire District Council and Cherwell District Council.</p> <p>The area comprises the town of Woodstock, where there is housing growth planned in the West Oxfordshire Local Plan, some of which is already underway, and the surrounding villages, which have generally seen low levels of housing growth in recent years.</p> <p>In the Cherwell Local Plan there is now large-scale housing growth allocated for the south of this area, at Yarnton and Begbroke.</p>
Woodstock Primary	<p>Primary school intakes in many village schools have fluctuated – across the area as a whole there has been slight growth, but not evenly distributed. There is currently surplus capacity in some schools in this area, while others are at or close to full capacity. The main areas of housing growth now planned are at Woodstock, Yarnton and Begbroke.</p> <p>Woodstock CE Primary School [3145] has previously been expanded to 1.5 form entry, and a project has now started to further expand it to 2 forms of entry to meet the housing growth underway and planned for Woodstock town. The target date for expansion is 2023. One of the planned housing developments also lies in the catchment area for Wootton-by-Woodstock CE Primary School, which currently has surplus capacity.</p> <p>To meet the needs of an earlier housing development, William Fletcher Primary School [2354] in Yarnton was expanded to 1.5 form entry. Intakes at the school have since fluctuated as the housing development matured. The Cherwell Local Plan allocates a site for 540 new homes just north of the school site; to meet the school capacity needs which will be generated by this, William Fletcher will need to expand to 2 forms of entry, and additional site area for the school to enable this is identified in the Local Plan.</p> <p>The scale of growth planned at Begbroke will require one or two new primary schools. The timing and order of delivery of the new school(s) and the expansion of William Fletcher will depend on how the associated housing developments progress, and current pupil forecasts indicate that additional capacity will start to be required in the second half of this decade.</p>
Woodstock Secondary	<p>Bladon CE Primary School [3146] has previously seen small-scale expansion to be able to accommodate housing growth in the village, but is on a very constrained site and is not thought able to expand further.</p> <p>Bletchingdon Parochial CE Primary School [3141] relocated to a new site in order to expand in 2015. Intakes have fluctuated, as is common in small village schools, but there is some housing development still underway in the village which should increase the local pupil population.</p> <p>Stonesfield Primary School [2353] is reducing its admission number from 30 to 20 for 2022 onwards, to better reflect the constraints of its accommodation and local levels of demand.</p> <p>The Marlborough School [4560] has been consistently popular and has very little spare capacity. A particularly large pupil cohort in the local primary schools is</p>

due to transfer to secondary school in 2022, after which demand for secondary school places is expected to return to more usual levels, before the local housing development generates longer term growth.

As well as the housing developments in Woodstock town, the school also serves the Begbroke and Yarnton areas where there is larger scale housing included in the Cherwell Local Plan.

Marlborough CE School is working with the county council to plan a one-form expansion. In the first instance the academy will take a "bulge" class in 2022 to meet a spike in demand, ahead of developing plans for a more permanent expansion, which is subject to consultation and approval from the Regional Schools Commissioner and will require additional accommodation. The timing of this permanent expansion is not yet confirmed.

This expansion is related to the housing growth in the town, as set out in the West Oxfordshire Local Plan. It is not expected to be able to also meet the scale of growth in the Cherwell Local Plan at Yarnton and Begbroke (as well as between Kidlington and north Oxford). This will be met through a combination of increasing pupil numbers at Gosford Hill and new school accommodation, with a secondary school site included within the Begbroke development area. As this and the wider area has a complex pattern of housing growth and school capacity expansion, at this stage the timing and exact scale of the new provision at Begbroke cannot be confirmed, but it is unlikely to be required before the end of the decade.

Woodstock

Schools	Planning Sub-area	Sector	School code	2020/21 (data correct as of May 2021)															2021/22		
				Allocations			First preference applications			Published admission number			Total capacity			Total pupil numbers					
Bladon CE Primary School	Woodstock Primary	3146	Primary	VC	0	14	14	13	16	15	15	14	14	0	0	0	101	98	14	10	10
Bloxchingdon Parochial CE Primary School	Woodstock Primary	3141	Primary	VA	30	15	13	13	15	11	9	13	14	0	0	0	88	105	15	7	7
Combe CE Primary School	Woodstock Primary	3142	Primary	VC	0	15	15	16	17	17	17	17	14	0	0	0	113	105	15	18	17
Kirtlington CE Primary School	Woodstock Primary	3500	Primary	VA	0	15	13	15	5	10	6	14	7	0	0	0	70	105	15	15	15
Stonesfield Primary School	Woodstock Primary	2353	Primary	COM	0	30	11	16	14	15	15	17	12	0	0	0	100	140	30	13	13
Tackley CE Primary School	Woodstock Primary	3144	Primary	ACA	0	15	18	6	15	13	12	14	13	0	0	0	91	105	15	7	7
William Fletcher Primary School	Woodstock Primary	2354	Primary	COM	0	45	41	32	48	36	31	42	40	0	0	0	270	315	30	32	33
Woodstock CE Primary School	Woodstock Primary	3145	Primary	VC	52	45	45	45	41	45	45	44	44	0	0	0	309	315	45	43	44

Woodstock

		2021/22									
		Allocations		3		180		149		180	
		First preference applications		3		192		148		192	
		Published admission number		10		180		189		180	
		Total capacity		70		1138		1358		1138	
		Total pupil numbers		29		1041		1171		1041	
		Year 13 pupils		0		58		58		58	
		Year 12 pupils		0		85		85		85	
		Year 11 pupils		0		179		179		179	
		Year 10 pupils		0		180		180		180	
		Year 9 pupils		0		178		178		178	
		Year 8 pupils		0		179		179		179	
		Year 7 pupils		0		182		182		182	
		Year 6 pupils		6		0		164		164	
		Year 5 pupils		7		0		182		182	
		Year 4 pupils		6		0		156		156	
		Year 3 pupils		3		0		165		165	
		Year 2 pupils		3		0		174		174	
		Year 1 pupils		2		0		158		158	
		Reception pupils		0		172		172		172	
		Published admission number		180		204		180		180	
		Nursery places (PTE)		0		82		82		82	
		Type of school									
		Sector									
		School code									
		Planning Sub-area									
		Schools									
Page 196		Wootton-By-Woodstock CE Primary School		Woodstock Primary		3657		Primary		ACA	
		The Marlborough CE School		Woodstock Secondary		4560		Secondary		ACA	
		Planning Sub-area									
		School code									
		Nursery places (PTE)									
		Type of school									

6. SPECIAL EDUCATION PROVISION

Special Education & Disabilities Provision (SEND) is provided through a mixture of special schools and specialist resource provision units for children with a specific need, e.g. hearing impairment or autism, based on the sites of the mainstream schools. In addition to the maintained schools shown, a number of Further Education colleges and independent providers supply additional capacity.

Despite expansions of SEND capacity in recent years, demand for special school places has grown faster than supply, resulting in increasing dependence on the independent and non-maintained special school sector. Planning is now underway to significantly expand Oxfordshire's maintained provision for SEND, to not only keep up with population growth, but also ensure the High Needs budget is used more effectively to better meet the needs of children with Special Educational Needs & Disabilities.

<u>Categories of SEND</u>	
ASD	Autistic Spectrum Disorder
HI	Hearing Impairment
MLD	Moderate Learning Difficulty
MSI	Multi-Sensory Impairment
PD	Physical Disability
PMLD	Profound and Multiple Learning Difficulty
SEMH	Social, Emotional and Mental Health. This category replaced Behavioural, Emotional and Social Difficulty (BESD) in 2015.
SLCN	Speech, language and Communication Needs
SLD	Severe Learning Difficulty
SPLD	Specific Learning Difficulty (e.g. dyslexia, dyspraxia, attention deficit-hyperactivity disorder, dyscalculia and dysgraphia)
VI	Visual Impairment

A SEND Sufficiency Strategy was approved by the County Council Cabinet in December 2018, and is available online at www.oxfordshire.gov.uk . The Strategy includes four strands:

1. Ensure that all early years providers and mainstream schools support an inclusive approach to education.
2. Develop the network of resource base provision across the county, setting up new resource bases in existing schools and incorporating them within new mainstream schools where appropriate.
3. Continuing the programme of expanding the county's special schools.
4. New schools: open two new special schools focused on social, emotional and mental health needs and Autism, one in north Oxfordshire (Bloxham Grove) and one in southern Oxfordshire, and rebuild Northfield school (now renamed as Orion Academy, the rebuild of which completed in 2021).

This strategy has already resulted in significant expansion of special education capacity, with further projects underway or planned. Work is underway to update this Strategy.

The following pages set out the current and confirmed future special education provision in Oxfordshire's maintained school sector.

Special schools								
Code	Name	Location	Type of school	Age range	Details	Funded places 2021/22	Capacity by 2025 including confirmed expansions	
Special schools open in 2021								
7029	Bardwell School	Bicester	ACA	All age	Community special school - SLD / PMLD; expansion project completed October 2021.	94	103	
7030	Bishopswood School	Sonning Common & Henley	COM	All age	Community special school - SLD / PMLD - split across three sites, colocated with Valley Road Primary School; Sonning Common Primary School; Maiden Erlegh Chiltern Edge (secondary) School. Feasibility study underway into replacement of some accommodation and expansion.	72	72	
7003	Endeavour Academy, Oxford	Oxford	ACA	KS2-KS5	Special school - ASD / SLD	32	32	
7027	Fitzwaryn School	Wantage	ACA	KS2-KS5	Community special school - SLD / PMLD / complex MLD	112	112	
7010	Frank Wise School	Banbury	COM	All age	Community special school - SLD / PMLD	116.8	116.8	
7011	John Watson School	Wheatley	COM	All age	Community special school - SLD / PMLD; split across two sites co-located with Wheatley CE Primary School/ Wheatley Nursery School and Wheatley Park (secondary) School. Expansion project underway, due to complete 2022.	93	107	
7000	Kingfisher School	Abingdon	ACA	All age	Community special school - SLD / PMLD; expansion project in development, due to complete 2023.	102	118	
7020	Mabel Prichard School	Oxford	ACA	All age	Community special school - SLD / PMLD; split across two sites, colocated with Orchard Meadow Primary School and Oxford Academy.	106	110	
5950	Northern House Academy	Oxford	ACA	Primary	Special school - SEMH	86	86	
7004	Orion Academy	Oxford	ACA	Secondary	Special school - SEMH - completely rebuilt in 2021 and growing to new capacity. 2021 funded places includes 90 at the main school and 12 at the Orion Satellite (which is due to close once Bloxham Grove opens).	102	108	
7012	Springfield School	Witney	ACA	All age (no 6th form)	Community special school - SLD / PMLD; split across two sites, colocated with Madley Brook Primary School and Wood Green (secondary) School.	110	110	
7018	The Iffley Academy	Oxford	ACA	KS3-KS5	Special school - ASD / SEMH / complex MLD - has increased places offered temporarily ahead of Bloxham Grove School opening. Completely rebuilt in 2020.	175	175	
7002	Woodeaton Manor School	Woodeaton, nr Oxford	FT	KS2-KS5	Special school - SEMH	86	86	
Planned new special schools confirmed as at 2021								
NEW	Bloxham Grove	Bloxham	ACA	KS2-KS5	Special school - ASD / SEMH - due to open in 2023. In the meantime, Orion School is operating a satellite provision of 12 places (shown within Orion School's funded places).	0	100	
NEW	Special School serving Southern Oxfordshire	TBC	ACA	KS2-KS5	Special school - ASD/SEMH - approved in principle by the DfE; timescale dependent on site availability for building.	0	100	
Total Places							1286.8	1535.8

SEND Resource Bases								
Code	Name	Location	Type of school	Age range	Details	Funded places 2021/22	Eventual size currently planned	
Resources bases open in 2021								
4127	Fitzharrys School	Abingdon	ACA	Secondary	Resource base - C&I	12	12	
4125	Larkmead School	Abingdon	ACA	Secondary	Resource base - HI	8	8	
4580	Lord Williams's School	Thame	ACA	Secondary	Resource base - C&I	20	20	
2020	New Marston Primary School	Oxford	ACA	Primary	Resource base - HI	8	8	
3182	St Andrew's Church of England Primary School	Chinnor, nr Thame	VC	Primary	Resource base - C&I	10	10	
2352	St Nicholas' Primary and Nursery School	Oxford	COM	Primary	Resource base - C&I	15	15	
4116	The Cherwell School	Oxford	ACA	Secondary	Resource base - C&I (20 places); HI (10 places)	30	30	
4560	The Marlborough Church of England School	Woodstock	ACA	Secondary	Resource base - C&I, PD	24	24	
4007	The Warriner School	Bloxham	ACA	Secondary	Resource base - C&I	12	12	
4017	Whitelands Academy	Bicester	ACA	Secondary	Resource base - SEMH	2	8	
4052	Wood Green School	Witney	ACA	Secondary	Resource base - MLD; academy developing proposal to expand resource base places to 30	22	22	
Planned new resource bases confirmed as at 2021								
2011	Aureus Primary School	Didcot	ACA	Primary	Planned resource base - SEMH - negotiations in progress - earliest opening date 2022	0	8	
2034	Barton Park Primary School	Oxford	ACA	Primary	Planned resource base - SEMH - negotiations in progress - earliest opening date 2023	0	6	
2036	Cherry Fields Primary School	Banbury	ACA	Primary	Planned resource base - C&I - negotiations in progress - earliest opening date 2023	0	6	
2561	Faringdon Infant School - to become Folly View Primary School in September 2022	Faringdon	ACA	Primary	Planned resource base - C&I - negotiations in progress - earliest opening date 2023	0	8	
2014	Gagle Brook Primary School	Bicester	ACA	Primary	Approved resource base - C&I/SEMH - opening 2022	0	12	
2607	Southwold Primary School	Bicester	ACA	Primary	Approved resource base - C&I/SEMH - opening 2022	0	12	
NEW	St John's Academy	Grove, nr Wantage	ACA	All age	Planned resource base - SEMH / ASD - as part of new school due to open 2023 (primary) and 2024 (secondary)	0	60	
2038	Windrush CoE Primary School	Witney	ACA	Primary	Planned resource base - C&I/ASD - due to open 2024	0	8	
Total Places							163	289

In addition to the special schools and resource bases shown above, there are two further specialist establishments:

Meadowbrook College is an Alternative Provision (AP) academy that delivers Oxfordshire's Pupil Referral Unit and Reintegration Service. The school is funded by the DfE for 106 full-time places. These are offered as a mixture of short-term and longer term, and full-time or part-time, provision. Numbers therefore fluctuate throughout the year. The school is located across three sites in Oxfordshire: Banbury, Oxford and Abingdon.

The Oxfordshire Hospital School, based across a number of settings throughout the county, provides education for children & young people aged 4-19 who are unable to attend their home school due to a wide range of medical and mental health needs. Students may access education through the hospital school for varied periods of time.

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Treasury Management Strategy Statement & Annual Investment Strategy for 2022/23

Executive Summary

1. The Treasury Management Strategy & Annual Investment Strategy for 2022/23 outlines the Council's strategic objectives in terms of its debt and investment management for the financial year 2022/23.
2. The forecast average cash balance for 2022/23 is £442m. The Council will maintain the investment in strategic pooled funds with a purchase value of £101m (23%), with the remaining £341m (77%) being managed internally with a mixture of short, medium and long-term deposits.
3. The Bank of England Base Rate is forecast to increase to 0.25% before the start of the financial year and rise again to 0.50% during the financial year.
4. UK Government Gilt yields are forecast to rise from 1.30% to 1.90% over the medium term.
5. Changes to the Treasury Management Strategy will be recommended to Council to be delegated to the Director of Finance in consultation with the Leader of the Council and Cabinet Member for Finance

Changes from 2021/22 Strategy

6. The long term lending limits are proposed to change as follows:

	From	To
2022/23	£185m	£205m
2023/24	£185m	£175m
2024/25	£185m	£165m
2025/26	£185m	£165m
2026/27	n/a	£165m

7. The introduction of a "Liability Benchmark" in paragraph 51 as set out in the updated Prudential Code for Capital Finance in Local Authorities that was issued on 20 December 2021.

Background

8. The Local Government Act 2003 and supporting regulations require the Council to 'have regard to' the Prudential Code and to set Prudential Indicators for the next three years to ensure that the Council's capital investment plans are affordable, prudent and sustainable.
9. The Act requires the Council to set out its treasury strategy for borrowing and to prepare an Annual Investment Strategy (as required by Investment Guidance issued subsequent to the Act). The Annual Investment Strategy sets out the

Council's policies for managing its investments and for giving priority to the security and liquidity of those investments.

10. Treasury management is defined as: "The management of the organisation's borrowing, investments and cash flows, including its banking, money market and capital market transactions; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks."
11. The proposed strategy for 2022/23 is based upon the views of the Council's Treasury Management Strategy Team (TMST)¹, informed by market forecasts provided by the Council's treasury advisor, Link Treasury Services.
12. It is proposed that any further changes required to the Annual Treasury Management Strategy & Annual Investment Strategy, continue to be delegated to the Director of Finance in consultation with the Leader of the Council and Cabinet Member for Finance.

Treasury Limits for 2022/23 to 2025/26

13. The Authorised Borrowing Limit requires the Council to ensure that total capital investment remains within sustainable limits and that the impact upon future council tax levels is 'acceptable'.
14. The capital investment relevant to this indicator to be considered for inclusion incorporates financing by both external borrowing and other forms of liability, such as credit arrangements. The Authorised Limit is to be set, on a rolling basis, for the forthcoming financial year and two successive financial years.

Forecast Treasury Portfolio Position

15. The Council's treasury forecast portfolio position for the 2022/23 financial year comprises:

	Principal £m	Average Rate %
Opening External Debt Balance		
PWLB	263.383	4.533
LOBO	45.000	3.943
Money Market Loans	5.000	3.950
TOTAL EXTERNAL DEBT	335.383	
2022/23 Average Cash Balance		
Average In-House Cash	340.630	
Average Externally Managed	101.006	
TOTAL INVESTMENTS	442.230	

16. The average forecast cash balance for 2022/23 is comprised of the following:

¹Comprising the Director of Finance, Service Manager (Pensions), Head of Financial Strategy and Treasury Manager.

		Average Balance £m
Earmarked Reserves		84.150
Capital and Developer Contributions		270.300
General Balances		30.900
Cashflow and Working Capital Adjustments		141.900
Internal Borrowing		-99.444
Provisions and Deferred Income		13.424
TOTAL		442.230

Treasury Management Advisors

17. Link Treasury Services Ltd provide treasury management advice to the Council.

Prospects for Interest Rates

Economic Forecast – Provided by Link Treasury Services Ltd (10 November 2021)

18. Link provided the following forecasts on 8 November 2021. These are forecasts for certainty rates, gilt yields plus 80 bps.

Link Group Interest Rate View 8.11.21														
	Dec-21	Mar-22	Jun-22	Sep-22	Dec-22	Mar-23	Jun-23	Sep-23	Dec-23	Mar-24	Jun-24	Sep-24	Dec-24	Mar-25
BANK RATE	0.25	0.25	0.50	0.50	0.50	0.75	0.75	0.75	0.75	1.00	1.00	1.00	1.00	1.25
3 month ave earnings	0.30	0.40	0.50	0.50	0.50	0.60	0.80	0.90	1.00	1.00	1.00	1.00	1.00	1.00
6 month ave earnings	0.40	0.50	0.60	0.60	0.70	0.80	0.90	1.00	1.10	1.10	1.10	1.10	1.10	1.10
12 month ave earnings	0.50	0.60	0.70	0.70	0.80	0.90	1.00	1.10	1.20	1.20	1.20	1.20	1.20	1.20
5 yr PWLB	1.50	1.50	1.60	1.60	1.70	1.70	1.70	1.80	1.80	1.80	1.90	1.90	2.00	2.00
10 yr PWLB	1.80	1.90	1.90	2.00	2.00	2.10	2.10	2.20	2.20	2.20	2.30	2.30	2.30	2.40
25 yr PWLB	2.10	2.20	2.30	2.40	2.40	2.40	2.50	2.50	2.60	2.60	2.60	2.60	2.70	2.70
50 yr PWLB	1.90	2.00	2.10	2.20	2.20	2.20	2.30	2.30	2.40	2.40	2.40	2.40	2.50	2.50

Additional notes by Link on this forecast table: -

- LIBOR and LIBID rates will cease from the end of 2021. Work is currently progressing to replace LIBOR with a rate based on SONIA (Sterling Overnight Index Average). In the meantime, our forecasts are based on expected average earnings by local authorities for 3 to 12 months.
- Our forecasts for average earnings are averages i.e., rates offered by individual banks may differ significantly from these averages, reflecting their different needs for borrowing short term cash at any one point in time.

19. The coronavirus outbreak has done huge economic damage to the UK and to economies around the world. After the Bank of England took emergency action in March 2020 to cut Bank Rate to 0.10%, it left Bank Rate unchanged at its subsequent meetings.

20. As shown in the forecast table above, the forecast for Bank Rate now includes five increases, one in December 2021 to 0.25%, then quarter 2 of 2022 to 0.50%,

quarter 1 of 2023 to 0.75%, quarter 1 of 2024 to 1.00% and, finally, one in quarter 1 of 2025 to 1.25%.

21. Link views the following as risks to the economic forecast:

- **Labour and supply shortages** prove more enduring and disruptive and depress economic activity.
- **Mutations** of the virus render current vaccines ineffective, and development of vaccines to combat these mutations takes time, resulting in further national lockdowns or severe regional restrictions.
- **The Monetary Policy Committee** raises the Bank Rate to quickly or too far over the next three years and causes UK economic growth, and increases in inflation, to be weaker than we currently anticipate.
- **UK / EU trade arrangements** – complications or lack of co-operation in resolving significant remaining issues could cause a major impact on trade flows and financial services.
- **Longer term US treasury yields** rise strongly and pull gilt yields up higher than forecast
- **Major stock markets** e.g., in the US, become increasingly judged as being over-valued and susceptible to major price corrections. Central banks become increasingly exposed to the “moral hazard” risks of having to buy shares and corporate bonds to reduce the impact of major financial market selloffs on the general economy
- **Geopolitical risks**, for example in Iran, North Korea, but also in Europe and Middle Eastern countries; on-going global power influence struggles between Russia/China/US. These could lead to increasing safe-haven flows

Forecast for Bank Rate

22. It is not expected that Bank Rate will increase quickly after the initial rate rise as the underlying supply potential of the economy is not likely to have taken a major hit during the pandemic: it should, therefore, be able to cope well with meeting demand after supply shortages subside over the next year, without causing inflation to remain elevated in the medium-term, or to inhibit inflation from falling back towards the Monetary Policy Committee’s 2% target after the spike up to around 5% in 2022. The forecast includes five increases in Bank Rate over the three-year forecast period to March 2025, ending at 1.25%.

Forecasts for PWLB rates and gilt and treasury yields

23. As the interest forecast table for PWLB certainty rates above shows, there is likely to be a steady rise over the forecast period, with some degree of uplift due to rising treasury yields in the US

Treasury Management Strategy Team's View

24. The Council's TMST, taking into account the advice from Link Treasury Services, market implications and the current economic outlook, have determined the rates to be included in the Strategic Measures budget for 2022/23 and over the medium term. TMST forecast a rise to 0.25% before the start of the financial year, another rise to 0.50% during the financial year. Another rise to 0.75% is forecast during 2023/24.
25. The TMST team has agreed that based on the current portfolio of deposits and market rates, the target in-house rate of return as set out below. These rates have been incorporated into the strategic measures budget estimates:
 - 2022/23 0.35%
 - 2023/24 0.75%
 - 2024/25 -2026/27 1.00%

Borrowing Strategy

26. Borrowing rates are forecast to be between 1.40 – 2.60% in the short to medium term. Whilst there will be a “cost of carry”² associated with the long-term borrowing compared to temporary investment, it is smaller compared to recent years.
27. The external borrowing of the Council is set to fall well below the Capital Financing Requirement due to increased capital expenditure and £88m of debt repayments by 2027/28.
28. The Council needs to borrow to finance prudential schemes. The Council's Capital Programme Financing Principles applies capital grants, developer contributions, capital receipts and revenue contributions to fund capital expenditure before using prudential borrowing.
29. Financing the Council's borrowing requirement internally would reduce the cost of carry in the short term but there is a risk that the internal borrowing would need to be refinanced with external borrowing at a time when PWLB (or its successor) and market rates exceed those currently available.
30. The Council's TMST have agreed that they should maintain the option to fund new or replacement borrowing through internal borrowing. Internal borrowing will have the effect of reducing some of the “cost of carry” of funding. Internal borrowing will also be used to finance prudential schemes. The limit of internal borrowing will be combined with the long term lending limit, and will not exceed £300m.
31. The TMST will monitor the borrowing rates during the 2022/23 financial year. If changes in interest rate forecasts mean the policy to borrow internally is no longer

² The difference between the interest payable on borrowing on debt and the interest receivable from investing surplus cash.

in the short term or long-term interests of the Council, the TMST may take out new or replacement borrowing to give the Council certain of cost over the long term, and to reduce Interest Rate Risk and Refinancing Risk in the short to medium term. Any borrowing will be reported to Cabinet.

32. As the Accountable Body for OxLEP Ltd, the Council will be required to prudentially borrow £41m on their behalf for project funding from 2021/22 onwards. The borrowing will be included in the Council's overall borrowing requirement, using internal or external borrowing as appropriate. The loans will be repaid through the retained business rates of the Enterprise Zone 1.
33. If the PWLB offer any further lending rounds of the Local Infrastructure Rate, it is likely to be at a discounted interest rate of gilts + 60 basis points. The borrowing on behalf of OxLEP may be eligible as the schemes are all major infrastructure schemes.
34. The Council's chief objective when borrowing money is to strike an appropriate balance between securing low interest costs and achieving cost certainty over the period for which funds are required. The flexibility to renegotiate loans should the Authority's long-term plans change is a secondary objective.
35. The approved sources of long-term and short-term borrowing are:
 - Public Works Loan Board and any successor body
 - UK local authorities
 - any institution approved for investments (see below)
 - any other bank or building society authorised by the Prudential Regulation Authority to operate in the UK
 - UK public and private sector pension funds
 - capital market bond investors
 - special purpose companies created to enable joint local authority bond issues.

Borrowing for the Capital Financing Requirement

36. The Council's Capital Financing Requirement (CFR) represents the Council's underlying need to finance capital expenditure by borrowing. The Council's CFR is currently forecast to increase over the medium-term financial plan. This is a result of the requirement to borrow on behalf of the OxLEP discussed in paragraph 32 and increased investment in the Council's Capital Programme, and the previously agreed infrastructure investment.
37. The Council's external debt is also forecast to increase over the medium-term financial plan as new external borrowing required for OxLEP projects and the infrastructure investment is forecast to exceed the rate at which existing long term debt is repaid upon maturity.

Borrowing Instruments

38. The main source of borrowing for the Council is the PWLB. The borrowing rate from the PWLB is directly linked to UK Government Gilt yield. There are three rates offered by the PWLB; the standard rate, the certainty rate and local infrastructure rate, which are 100, 80 and 60 basis points over gilts, respectively.
39. The Council will apply to qualify for the certainty rate each year. If the PWLB announce further infrastructure rate programmes, the Council will apply for it if appropriate.
40. The TMST forecast for available rates from the PWLB over the medium term are as follows:
 - 1.50 – 2.70% for the Certainty rate
 - 1.30 – 2.50% for the Infrastructure rate
41. The Council has historically set a maximum limit of 20% of the debt portfolio to be borrowed in the form of Lender's Option Borrower's Option (LOBOs). It is recommended that this remain as the limit for 2022/23. As at 30 November 2021 LOBOs represent 14.4% of the total external debt.
42. The Council has five £5m LOBO's with call options in 2022/23, three of which have two call options in year, whilst two have a single call option in year. At each call date, the lender may choose to exercise their option to change the interest rate payable on the loan. If the lender chooses to do so, the Council will evaluate alternative financing options before deciding whether or not to exercise the borrower's option to repay the loan or to accept the new rate offered. It is likely that if the rate is changed the debt will be repaid. The TMST will explore early repayment of LOBO's if there were to arise and where there is a financial benefit to do so.
43. Other sources of funding be available to the Council include the money market, other Local Authorities and the Municipal Bond Fund. The TMST will consider all available funding sources when entering into any new borrowing arrangements.
44. As at November 2021, the average borrowing rate across the whole portfolio taking account all of the sources of funding was 4.44%. The rate for new debt is estimated at 1.9%. If the council takes out new debt at that rate it will reduce the average borrowing rate across the portfolio.

Link Treasury Services View on borrowing rates

45. Link Treasury Services have forecast gilt yields and borrowing rates over the medium term to be as follows:

Duration	Gilt Yield %	PWLB Infrastructure Rate %	PWLB Certainty Rate %
50 year	1.10 – 1.70	1.70 – 2.30	1.90 – 2.50
25 year	1.30 – 1.90	1.90 – 2.50	2.10 – 2.70
10 year	1.00 – 1.69	1.60 – 2.20	1.80 – 2.40
5 year	0.70 – 1.20	1.30 – 1.80	1.50 – 2.00

Treasury Management Prudential Indicators for Debt

Gross and Net Debt

46. This indicator is intended to identify where an authority may be borrowing in advance of need.

Upper Limit of net debt:	2020/21	2022/23	2022/23	2023/24	2024/25
Net Debt / Gross Debt	70%	70%	70%	70%	70%

Upper and lower limits to maturity structure of fixed rate borrowing

47. This indicator highlights the existence of any large concentrations of fixed rate debt needing to be replaced at times of uncertainty over interest rates and is designed to protect against excessive exposures to interest rate changes in any one period, in particular in the course of the next ten years.

48. It is calculated as the amount of projected borrowing that is fixed rate maturing in each period as a percentage of total projected borrowing that is fixed rate. The maturity of borrowing is determined by reference to the earliest date on which the lender can require payment.

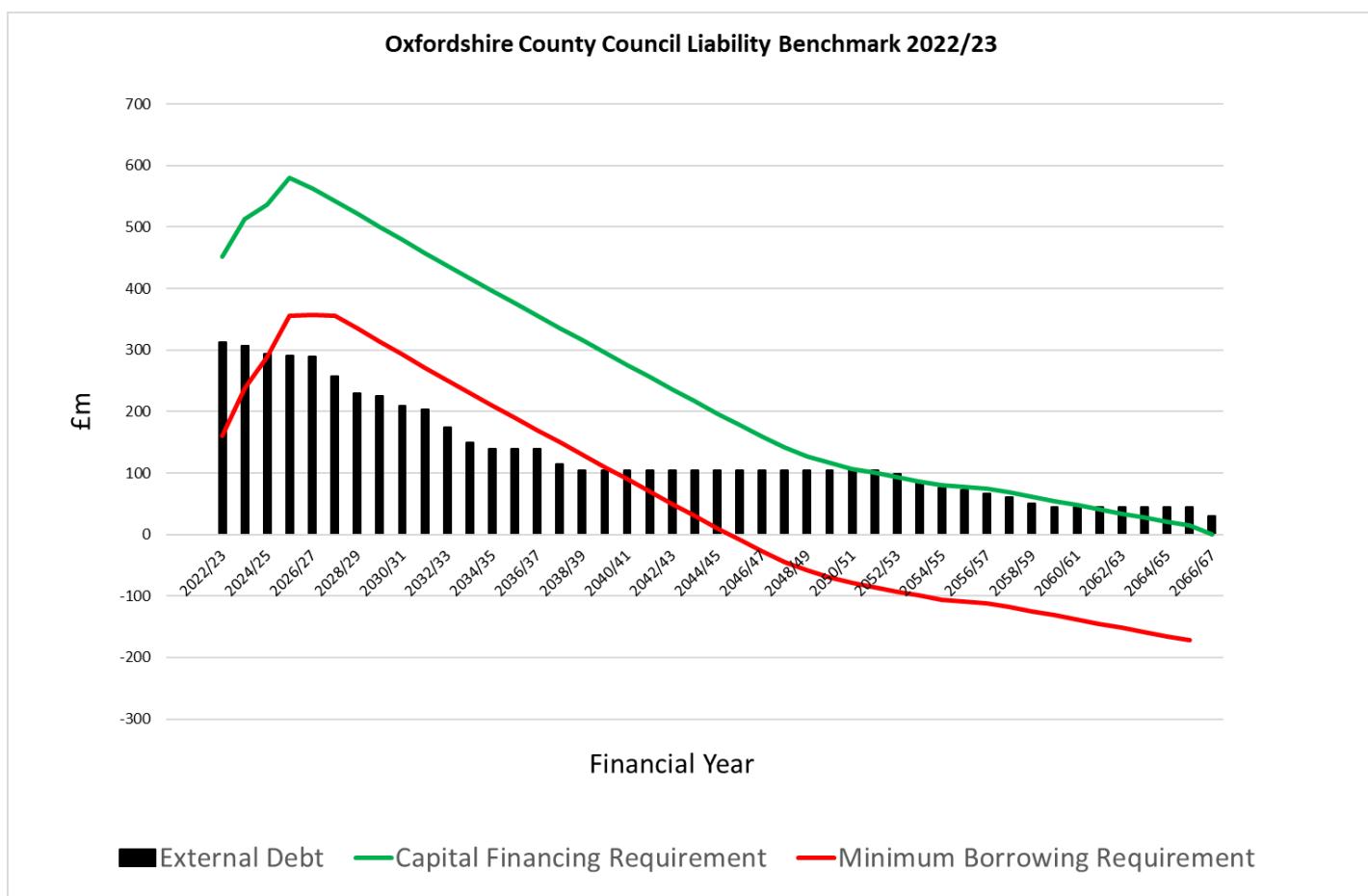
49. LOBOs are classified as maturing on the next call date, this being the earliest date that the lender can require repayment.

Maturity structure of fixed rate borrowing during 2022/23	Lower Limit %	Upper Limit %
Under 12 months	0	20
12 months and within 24 months	0	25
24 months and within 5 years	0	35
5 years and within 10 years	5	40
10 years and above	40	95

Liability Benchmark

50. Changes to the Prudential Code for Capital Finance in Local Authorities were consulted on in 2021. The Liability Benchmark (ie. the real need to borrow) is an additional prudential indicator introduced in the updated code. This identifies the minimum future borrowing needs, compared to the capital financing requirement and the actual level of external debt.

51. The gap between the capital financing requirement and the minimum borrowing requirement³ represents the maximum amount of financing that can be temporarily funded through internal borrowing. Based on the assessment below the council would need to internally borrow up to £292m in 2022/23.



³ The minimum borrowing requirement is calculated by taking the capital financing requirement, netting off usable reserves and working capital, and adding on a liquidity allowance.

Annual Investment Strategy

52. The Council complies with all relevant treasury management regulations, codes of practice and guidance. The Council's investment priorities are: -
 - The security of capital and
 - The liquidity of its investments
53. The Council also aims to achieve the optimum return on its investments commensurate with proper levels of security and liquidity. The borrowing of monies purely to invest or on-lend and make a return is unlawful and the Council will not engage in such activity.
54. The Treasury Management Code of Practice requires the Council to approve a Treasury Management Policy Statement. Good practice requires that this statement is regularly reviewed and revised as appropriate. Council approved the statement in February 2019. The statement has been reviewed and there are no revisions proposed at present. The new CIPFA Code of Practice will be fully adopted in for 2023/24 and a new policy statement will be brought for approval before adoption.

Investment Instruments

55. Investment instruments identified for use in the 2022/23 financial year are set out in the Specified and Non-Specified instrument tables below
56. Guidance states that specified investments are those requiring "minimal procedural formalities". The placing of cash on deposit with banks and building societies 'awarded high credit ratings by a credit rating agency', the use of Money Market Funds (MMFs) and investments with the UK Government and local authorities qualify as falling under this phrase as they form a normal part of day to day treasury management.
57. Money market funds (MMFs) will be utilised, but good treasury management practice prevails and whilst MMFs provide good diversification the council will also seek to diversify any exposure by using more than one MMF where practical. It should be noted that while exposure will be limited, the use of MMFs does give the council exposure to institutions that may not be included on the approved lending list for direct deposits. This is deemed to be an acceptable risk due to the benefits of diversification. The Treasury team use an online portal to provide details of underlying holdings in MMFs. This enables more effective and regular monitoring of full counterparty risk.
58. All specified investments will be sterling denominated, with maturities up to a maximum of 1 year, meeting the 'high' credit rating criteria where applicable.

Specified Investment Instrument	Minimum Credit Criteria	Use
Term Deposits – UK Government	N/A	In-house
Term Deposits – other Local Authorities	N/A	In-house
Debt Management Agency Deposit Facility	N/A	In-house and Fund Managers
Treasury Bills	N/A	In-house and Fund Managers
UK Government Gilts	N/A	In-house on a buy and hold basis and Fund Managers
Term Deposits – Banks and Building Societies	Short-term F1, Long-term BBB+, Minimum Sovereign Rating AA+	In-house and Fund Managers
Certificates of Deposit issued by Banks and Building Societies	A1 or P1	In-house on a buy and hold basis and Fund Managers
Money Market Funds	AAA	In-house and Fund Managers
Other Money Market Funds and Collective Investment Schemes ⁴	Minimum equivalent credit rating of A+. These funds do not have short-term or support ratings.	In-house and Fund Managers
Reverse Repurchase Agreements - maturity under 1 year from arrangement and counterparty is of high credit quality (not collateral)	Long Term Counterparty Rating A-	In-house and Fund Managers
Covered Bonds – maturity under 1 year from arrangement	Minimum issue rating of A-	In-house and Fund Managers

59. Non-specified investment products are those which take on greater risk. They are subject to greater scrutiny and should therefore be subject to more rigorous justification and agreement of their use in the Annual Investment Strategy; this applies regardless of whether they are under one-year investments and have high credit ratings.

60. A maximum of 50% of internal investments, and 100% of external investments will be held in non-specified investments.

⁴ I.e., credit rated funds which meet the definition of a collective investment scheme as defined in SI 2004 No 534 and SI 2007 No 573.

Non-Specified Investment Instrument	Minimum Credit Criteria	Use	Max Maturity Period
Term Deposits – other Local Authorities (maturities in excess of 1 year)	N/A	In-house	5 years
UK Government Gilts with maturities in excess of 1 year	N/A	In-house and Fund Managers	5 years in-house, 10 years fund managers
Collective Investment Schemes ⁵ but which are not credit rated	N/A	In-house and Fund Managers	Pooled Funds do not have a defined maturity date
Registered Providers	As agreed by TMST in consultation with the Leader and the Cabinet Member for Finance	In-house	5 years
OxLEP Ltd	As agreed by TMST in consultation with the Leader and the Cabinet Member for Finance	In-house	5 years
Term Deposits – Banks and Building Societies (maturities in excess of 1 year)	Short-term F1+, Long-term AA-	In-house and Fund Managers	3 years
Structured Products (e.g. Callable deposits, range accruals, snowballs, escalators etc.)	Short-term F1+, Long-term AA-	In-house and Fund Managers	3 years
Bonds issued by Multilateral Development Banks	AAA	In-house and Fund Managers	25 years
Bonds issued by a financial institution which is guaranteed by the UK Government	AA	In-house and Fund Managers	5 years in-house

⁵ Pooled funds which meet the definition of a collective investment scheme as defined in SI 2004 No 534 and SI 2007 No 573.

Non-Specified Investment Instrument	Minimum Credit Criteria	Use	Max Maturity Period
Sovereign Bond Issues	AAA	In-house on a buy and hold basis. Fund Managers	5 year in-house, 30 years fund managers
Reverse Repurchase Agreements - maturity in excess of 1 year, or/and counterparty not of high credit quality.	Minimum long term rating of A-	In-house and Fund Managers	3 years
Covered Bonds	AAA	In-house and Fund Managers	20 years

Changes to Instruments

61. There are no proposed changes to instruments

Credit Quality

62. The CIPFA Code of Practice on Treasury Management (2021) recommends that Councils have regard to the ratings issued by the three major credit rating agencies (Fitch, Moody's and Standard & Poor's) and to make decisions based on all ratings. Whilst the Council will have regard to the ratings provided by all three ratings agencies, the Council uses Fitch ratings as the basis by which to set its minimum credit criteria for deposits and to derive its maximum counterparty limits. Counterparty limits and maturity limits are derived from the credit rating matrix as set out in the tables at paragraphs 73 and 74 respectively.

63. The TMST may further reduce the derived limits due to the ratings provided by Moody's and Standard & Poor's or as a result of monitoring additional indicators such as Credit Default Swap rates, share prices, Ratings Watch & Outlook notices from credit rating agencies and quality Financial Media sources.

64. Notification of any rating changes (or ratings watch and outlook notifications) by all three ratings agencies are monitored daily by a member of the Treasury Management Team. Updates are also provided by the Council's Treasury Management advisors Arlingclose and reported to TMST. Appropriate action will be taken for any change in rating.

65. Where a change in the Fitch credit rating places a counterparty on the approved lending list outside the credit matrix (as set out in tables at paragraphs 73 and 74), that counterparty will be immediately removed from the lending list.

66. The Authority defines “high credit quality” organisations as those having a credit rating of A- or higher that are domiciled in the UK or a foreign country with a sovereign rating of AA+ or higher with the Fitch ratings agency.

Liquidity Management

67. The Council forecasts its cash flow to determine the maximum period for which funds may prudently be committed. The forecast is compiled on a pessimistic basis, with receipts under-estimated and payments over-estimated to minimise the risk of the Council being forced to borrow on unfavourable terms to meet its financial commitments. Limits on long-term investments are set by reference to the Council’s medium term financial plan and cash flow forecast. The Council uses instant access bank deposit accounts and money market funds for balances forecast to be required at short notice to meet commitments due. The TMST will continue to monitor options available to maintain the required liquidity and will open new accounts with approved counterparties as appropriate.

Lending Limits

68. In addition to the limits determined by the credit quality of institutions, the TMST apply further limits to mitigate risk by diversification. These include:

- Limiting the amount lent to banks in any one country (excluding the UK) to a maximum of 20% of the investment portfolio.
- Limiting the amount lent to any bank, or banks within the same group structure to 10% of the investment portfolio.
- Actively seeking to reduce exposure to banks with bail in risk

69. Where the Council has deposits on instant access, this balance may temporarily exceed the 10% bank or group limit. However, the limits as set out in paragraphs 72 and 73 will still apply.

70. Counterparty limits as set out in paragraphs 73 and 74, may be temporarily exceeded by the accrual and application of interest amounts onto accounts such as call accounts, money market funds or notice accounts. Where the application of interest causes the balance with a counterparty to exceed the agreed limits, the balance will be reduced when appropriate, dependent upon the terms and conditions of the account and cashflow forecast.

71. Any changes to the approved lending list will be reported to Cabinet as part of the Business Management and Monitoring Report.

72. The Council also manages its credit risk by setting counterparty limits. The matrix below sets out the maximum proposed limits for 2022/23. The TMST may further restrict lending limits dependent upon prevailing market conditions. BBB+ to BBB- ratings is included for overnight balances with the Council’s bank, currently Lloyds Bank Plc. This is for practical purposes should the bank be downgraded.

LENDING LIMITS - Fitch Rating	Short Term Rating	
Long Term Rating	F1+	F1
AAA	£30m	£20m
AA+	£30m	£20m
AA	£25m	£15m
AA-	£25m	£15m
A+	£20m	£15m
A	£20m	£15m
A-	£15m	£10m
BBB+, BBB, BBB- (bank with which the Council has its bank account)	£20m	£20m

73. The Council also manages its counterparty risk by setting maturity limits on deposits, restricting longer term lending to the very highest rated counterparties. The table below sets out the maximum approved limits. The TMST may further restrict lending criteria in response to changing market conditions.

MATURITY LIMITS – Fitch Rating	Short Term Rating	
Long Term Rating	F1+	F1
AAA	3 years	364 days
AA+	2 years	364 days
AA	2 years	9 months
AA-	2 years	9 months
A+	364 days	9 months
A	9 months	6 months
A-	6 months	3 months
BBB+, BBB, BBB- (bank with which the Council has its bank account)	Overnight	Overnight

Other institutions included on the councils lending list - Structured Products

74. As at 30 November 2021, the Council had no structured products within its investment portfolio. Structured products involve varying degrees of additional risk over fixed rate deposits, with the potential for higher returns. It is recommended that the authority maintain the option to use structured products up to a maximum of 10% of the investment portfolio. The Council will continue to monitor structured products and consider restructuring opportunities as appropriate.

External Funds

75. The Council uses external fund managers and pooled funds to diversify the investment portfolio through the use of different investment instruments,

investment in different markets, and exposure to a range of counterparties. It is expected that these funds should outperform the Council's in-house investment performance over a rolling three-year period. The Council will have no more than 50% of the total portfolio invested with external fund managers and pooled funds (excluding MMFs). This allows the Council to achieve diversification while limiting the exposure to funds with a variable net asset value. And, in order to ensure appropriate diversification within externally managed and pooled funds these should be diversified between a minimum of two asset classes.

76. As at 30 November 2021, the Council had £104m (original purchase value of £101m) invested in external funds (excluding MMFs), representing 18% of the Council's total investment portfolio. As the pandemic continues, there is likely to be continued short term volatility in the value of the funds, however they are held with a long term view, and there is no intention to divest from any of the funds at present.
77. The external funds have a higher targeted income return than in house deposits of 3.75% which has been incorporated into the medium-term financial plan.
78. The performance of the pooled funds is monitored by the TMST throughout the year against the funds' benchmarks and the in-house investment returns. The TMST will keep the external fund investments under review and consider alternative instruments and fund structures, to manage overall portfolio risk. It is recommended that authority to withdraw, or advance additional funds to/from external fund managers, continue to be delegated to the TMST.

Investment Approach

79. The TMST will aim to maintain the balance between medium and long-term deposits with local authorities and short-term secured and unsecured deposits with high credit quality financial institutions. Money Market Funds will continue to be utilised for instant access cash. This approach will maintain a degree of certainty about the investment returns for a proportion of the portfolio, while also enabling the Treasury Management team to respond to any increases or decreases in interest rates in the short-term.

Treasury Management Indicators for Investments

Upper limit to total of principal sums invested longer than 364 days

80. The purpose of this limit is to contain exposure to the risk of loss that may arise as a result of the Authority having to seek early repayment of the sums invested.
81. The long term lending limit is based on 50% of the forecast average cash balance. Based on forecast balances reducing to £330m over the medium term, the proposed limits for investments longer than 364 day is set out below:

	2022/23 £m	2023/24 £m	2024/25 £m	2025/26 £m	2026/27 £m
Upper limit on principal sums invested longer than 364 days	205	175	165	165	165

Other Treasury Management Prudential Indicators

Upper limits on fixed and variable rate interest exposures

82. These indicators allow the Authority to manage the extent to which it is exposed to changes in interest rates.

Fixed interest rate exposure

83. Limits in the table below have been set to reflect the current low interest rate environment. The limits set out offer the Council protection in an uncertain interest rate environment by allowing the majority of the debt portfolio to be held at fixed interest rates, thus not subjecting the Council to rising debt interest.

Upper limit for fixed interest rate exposure	2022/23	2022/23	2023/24	2024/25	2025/26	2026/27
Net principal re fixed rate borrowing / investments	£350m	£350m	£350m	£350m	£350m	£350m

84. Fixed rate investments and borrowings are those where the rate of interest is fixed for at least 12 months, measured from the start of the financial year or the transaction date if later. All other instruments are classed as variable rate.

Variable interest rate exposure

The council will maintain a zero (or negative) net variable interest rate exposure. This is maintained by insuring the Council's variable rate debt is lower than variable rate investments

85. Prudential Indicators are reported to and monitored by the TMST on a regular basis and will be reported to the Audit & Governance Committee and Cabinet in the quarterly Treasury Management reports and the Treasury Management Annual Performance Report.

Policy on Use of Financial Derivatives

86. The Council will only use standalone financial derivatives (such as swaps, forwards, futures and options) where they can be clearly demonstrated to reduce the overall level of the financial risks that the Council is exposed to. Additional risks

presented, such as credit exposure to derivative counterparties, will be taken into account when determining the overall level of risk. Embedded derivatives will not be subject to this policy, although the risks they present will be managed in line with the overall treasury risk management strategy.

87. Financial derivative transactions may be arranged with any organisation that meets the approved investment criteria. The current value of any amount due from a derivative counterparty will count against the counterparty credit limit and the relevant foreign country limit.
88. It is the view of the TMST that the use of standalone financial derivatives will not be required for Treasury Management purposes during 2022/23. The Council will only use derivatives after seeking expertise, a legal opinion and ensuring officers have the appropriate training for their use.

Performance Monitoring

89. The Council will monitor its Treasury Management performance against other authorities through its membership of the CIPFA Treasury Management benchmarking club.
90. Arlingclose benchmark the performance of their clients against each other on a quarterly basis, looking at a variety of indicators including investment risk and returns.
91. Latest performance figures will be reported to the Audit & Governance Committee and Cabinet in the quarterly Treasury Management reports and the Treasury Management Annual Performance Report.

Investment Training

92. All members of the Treasury Management Strategy Team are members of CIPFA or other professional accounting body. In addition, key Treasury Management officers receive in-house and externally provided training as deemed appropriate and training needs are regularly reviewed, including as part of the staff appraisal process.
93. The Council has opted up to 'professional client' categorisation with under the second Markets in Financial Instruments Directive (MiFID II). In order to achieve this, evidence was required that the person(s) authorised to make investment decisions on behalf of the authority have at least one year's relevant professional experience and the expertise and knowledge to make investment decisions and understand the risks involved. Members of the TMST currently meet these criteria and training needs will be regularly monitored and reviewed to ensure continued compliance.

Financial Implications

94. Interest payable and receivable in relation to Treasury Management activities are included within the overall Strategic Measures budget. In house interest receivable for 2022/23 is budgeted to be £1.49m.
95. Dividends payable from external funds in 2022/23 are budgeted to be £3.81m.
96. Interest payable on external debt in 2022/23 is budgeted to be £14.39m.

Comments checked by:

Lorna Baxter, Section 151 Officer, lorna.baxter@oxfordshire.gov.uk

Legal Implications

97. There are no direct legal implications arising from this report save for the need for ongoing collaborative working between the S151 Officer and the Monitoring Office. CIPFA guidance promotes the need for consultative working and collaboration between these respective roles to promote good organisational governance.

Comments checked by:

Sukdave Ghuman, Deputy Monitoring Officer,
Sukdave.ghuman@oxfordshire.gov.uk

Sustainability Implications

98. This report is not expected to have any negative impact with regards to the Council's zero carbon emissions commitment by 2030.
99. The Treasury Management Strategy Team (TMST) will consider investments that may make a positive contribution to the Council's carbon commitment when appropriate opportunities become available. The TMST will continue to explore Ethical, Sustainable and good Governance investment practices.
100. The Council's Treasury Management Practices will be updated during 2022/23 to set out the Council's policy and practices relating to environmental, social and governance investment considerations.
101. Where the Council has investments in externally managed funds, each of the fund managers is a signatory to the United Nations Principal for Responsible Investment.
102. The Council is undertaking a review of all of its Treasury Management investments to produce a report on how it is performing with regards to Ethical, Social and Governance (ESG) criteria.

103. Furthermore, the Council will not knowingly invest directly in organisations whose activities include practices which are inconsistent with the values of the Council or the Council's zero carbon emissions commitment by 2030.

104. The Treasury Management function is now completely paperless, and remote working is likely to remain normal for the foreseeable future.

INVESTMENT STRATEGY – PROPERTY INVESTMENT

Introduction

An Investment Strategy for the governance and making of property investment decisions was agreed by council in September 2019 and was subsequently considered as part of the budget process for 2020/21 and 2021/22. This strategy sets out the investment framework, under which the Council can undertake investments which are expected to contribute both directly and indirectly to the strategic plan and the achievement of Oxfordshire Fair Deal Alliance's priorities including tackling inequality, improving health and wellbeing and taking action to address the climate emergency.

Continuing reductions in Central Government funding, at a time when Councils are facing increasing demand for services and an ageing population, means that alternative sources of income and optimisation of Council assets and resources need to remain a focus. The investment strategy is intended to enhance the financial resilience and social value delivery of the Council by enabling investments which:

- increase income from existing assets; and/or
- increase capital growth;
- secure new sources of income.
- support frontline service provision
- Explore opportunities for social value

There is also a Duty on the council to ensure best value for its assets. In addition opportunities to leverage, carbon reduction/neutralities initiatives should also be explored.

The Council has a key leadership role to play in placemaking in Oxfordshire. The investment decisions that it makes have the potential to greatly enhance the well-being and prosperity of communities across the County and to contribute to the achievement of the Oxfordshire Fair Deal Alliance's priorities. The Council will consider the social value of investment opportunities when making its decisions. Similarly, investments can also support the development of new delivery models for the benefit of residents, businesses, and visitors. The Council will also seek to prioritise opportunities that are carbon neutral, use/generate green energy, or reduce travel and waste. This is all part of our contribution to healthy place shaping and climate change.

The Council has an existing portfolio of land and buildings which, for a number of reasons, may be surplus to requirements as a result of the Council's evolving Property Strategy. There is therefore an opportunity to review these assets and resources, and then evaluate the most suitable options in order to optimise operational efficiency, customer access, and economic and financial value.

Furthermore, there are opportunities to support regeneration or growth using Council assets to leverage further investment or combine with other private or public sector partners to achieve specific regeneration and growth objectives.

The investment strategy also offers opportunities for generating income from assets and the opportunity to deliver a long term and sustainable income to enhance the financial resilience of the Council. These may be achieved through the capital programme or various investment vehicles which offer a range of diverse options to generate income. Each investment opportunity will be evaluated against stringent financial criteria to ensure each delivers gross income and/or social value/carbon neutral aspirations whilst taking consideration of the costs of operating, including lending and acquisition.

Statutory Framework

The Department for Levelling Up, Housing and Communities (DLUHC) has policy responsibility for the Chartered Institute of Public Finance and Accountancy (CIPFA) Prudential Code. This covers the responsibility for ensuring that statutory guidance drives local authorities to make borrowing and investment decisions in a way that is commensurate with their statutory responsibilities and the best value duty. DLUHC also includes overall responsibility for the Local Government finance system, including understanding the risks to the system from changes in the types of borrowing and investment activities that local authorities are undertaking.

The CIPFA Prudential Code requires that where authorities have commercial investments, that local authorities should disclose the contribution they make towards the service delivery objectives and/or place making role of the authority. In addition, the types of investment, due diligence processes, the proportionality of those investments and the local authority's risk appetite are also required to be set out. The Government also recognises that local authorities have a key role in local economic regeneration, and this may mean that they choose to take on projects that the private sector would not consider. Local Authorities cannot borrow from the Public Works Loans Board (PWLB) to fund commercial investments where return is the primary reason for the investment.

Investment Objectives

The Council's investment objectives are defined as follows:

- To support growth, regeneration and help deliver the Council's strategic priorities;
- To reinvest income in line with agreed financial targets to ensure growth of a balanced and diverse property portfolio that will maximise long term returns/income;
- To ensure the portfolio is governed and administered within appropriate risk parameters and in a way that supports long term sustainability for the Council and residents of Oxfordshire; To maximise the availability of capital receipts whenever property assets within the Investment Portfolio are sold to provide funding that can be used to support the capital programme in accordance with the council's Capital Programme Financing Principles.

Existing Property Investment Portfolio

The Council has an existing property portfolio made up of property assets and Treasury Management investments.

Treasury Management Investments include £26.6m (as at 30 November 2021) invested in property via a strategic pooled fund. In addition to this the council is investing £5.0m in the Resonance Supported Homes Fund which is expected to deliver up to 25 units of supported living accommodation in Oxfordshire for people with learning disabilities and autism.

As at 31 March 2021 £26.3m was held in direct investment properties held for rental returns or capital appreciation. These include :

- Agricultural holdings which were specifically retained in 1992 (when the rest of the Smallholdings Estate was sold) as these sites were recognised as holding long term potential for residential development. Since this time the Estates team have been promoting development of these sites through the Local Plan, and have significantly enhanced the value from farm land to residential development land as the sites have been allocated - total value £17.6m. Work continues to further enhance land values through master planning and ultimately grant of planning permission.
- Non-operational properties held for rental or capital returns total value £8.7m.

Investment Categories

Investments have been grouped into four broad categories as set out below

A	B	C	D
Maximise use of and value (both financial and social) of Council owned assets (land & buildings) linked to the Council's forthcoming Property Strategy – Capital expenditure	Investments for service delivery are taken or held primarily and directly for the delivery of public services (including regeneration and local infrastructure) or in support of joint working.	Property Investments made in accordance with the Treasury Management Strategy, including cash, money market funds, property funds, bond funds, equities and multi asset classes	Investments for commercial purposes, which generate a commercial return (yield) – normally capital expenditure

Category A

The Council already owns a sizeable property portfolio (land and buildings) comprising of operational and non-operational assets. Assets which are determined as surplus to operational requirements, via the evolving Property Strategy, will be considered for investment purposes. The Council's property rationalisation programme and agile working strategy will help to drive this type of investment.

Non-operational Sites – there are currently a number of major development sites totalling 86 hectares, that are in progress, with anticipated receipts expected from 2024. £40m of the anticipated receipts are already included within the capital programme funding up to

2028/29.¹ The table below shows the extent of our remaining non-operational land holdings that have development value.

Phases	Land Holdings	Indicative Timescales
In Progress	~86 hectares	Major Receipts 2024 onwards
Medium Term	~17 hectares	Receipts c.2035-40 onwards
Long Term	~29 hectares	Receipts c.2040-50 onwards

Operational Sites – closely linked to the Property Strategy, the Council has the potential to make further changes to how staff work in and use buildings in order to rationalise space and better match customer requirements. Using operational space more efficiently, including opportunities to share office accommodation with Partner organisations, has the ability to both reduce/share running costs and generate income from the commercial market. The Council's approach to agile working will be key to this.

Over the last decade there has been significant work to improve the utilisation of our sites, leading to a 25% reduction in running costs. A number of key Council-owned sites in central Oxford were reviewed in 2018 with input from external property consultants, validating the case for releasing and redeveloping specific sites in order to generate income.² With access to funding, under the investment strategy, there is potential across the estate to further optimise the use of our assets and invest in them to maximise capital values and/or rental yields.

Maximising the use of and value of Council owned assets to increase revenue return through appropriate change of use, is a key priority and it is anticipated that this will be the focus of the Property Investment Strategy over the short term. Where for commercial reasons it is considered more appropriate to sell Council owned assets, it is anticipated that these capital receipts will be reinvested in property assets.

Category B

This type of property investment reflects the acquisition of property primarily for regeneration purposes in order to deliver a wider social, service, or community benefit. They may include:

- Strategic regeneration / placemaking opportunities that provide benefits to the wider community including buildings for charitable or community uses;
- Delivery of projects that otherwise might stall or not progress if left in private sector hands but will fulfil Council priorities;
- Non-financial gains where inward investment can create/maintain jobs or prevent local market failure;

¹ The majority of these receipts will not be realised until at least 2024 onwards.

² Or in some cases, increase a capital receipt which could then be reinvested.

- Purchase of underperforming property assets which provide key strategic regeneration opportunities to generate the catalyst for future economic development;
- Partnering with others to deliver broader benefits and unlock financial investments for the area that would otherwise be lost.
- Investments in funds that create a supply of properties to meet service needs.

These investments will always be within the boundaries of Oxfordshire and will only be pursued where there is a clear business case demonstrating how it will contribute to the regeneration of Oxfordshire. Public Work Loan Board (PWLB) funding is available for the acquisition of Category B properties if necessary, subject to affordability.

Category C

The Council already has a portfolio of investments as part of its Treasury Management activities (of which £26.6m is invested in property funds). The strategic approach to these investments is reviewed on an annual basis as part of the Treasury Management Strategy Statement & Annual Investment Strategy. It is proposed that any change to investments that are classified under Category C are managed using the current Treasury Management governance framework. However, it is important to consider the portfolio of investments as a whole, especially as some investments in this category may be classified as capital expenditure rather than treasury management activity.

Category D

This type of investment reflects the acquisition of income producing property held for non-operational purposes. In considering properties in this category, prudence and caution must be exercised. Such investments would be undertaken for the primary purpose of achieving financial return (for which Public Work Loan Board (PWLB) funding is not available, although this would not preclude loan funding from other sources). These investments would be set against certain criteria in accordance with The CIPFA Prudential Code, to provide additional long-term revenue stream to support front line services and other Council objectives.

To date the council has not entered into any Category D investments. However, if the Council chooses to invest in this Category in future, the CIPFA Prudential Code principles will be followed.

The CIPFA Prudential Code is based upon the principle that Authorities should take relatively low risks when investing public money, and that investment considerations should include; affordability, prudence and proportionality (of the value of held property investment assets relative to the wider investment portfolio).

Local Authorities may not use PWLB to borrow for investments within Category D. This means that any investments within the category would need to be funded from existing Council resources or capital receipts. The benefits of utilising capital receipts for this purpose will need to be carefully balanced against the funding requirements of the wider capital programme and the benefits of reducing the need to borrow for other investment

in assets to support service delivery and infrastructure. Consideration will also be given to maintaining the investment portfolio size, diversity and yield.

Reporting and Management of Investment Portfolio

All investment activity will be grouped and reported as a single portfolio and reflected in the Council's Capital & Investment Strategy, which requires agreement via the annual budget setting process. As part of this, a new portfolio will be created in the Capital Programme to cover dedicated funding for investments. Investments and returns will be monitored and appropriately balanced across the Investment Categories.

The Investment portfolio will be kept under review on a regular basis by the S.151 Officer and the relevant Director/Head of Service.

The process by which the Investment Portfolio is managed is set out in Annex 1. This management process will be reviewed and updated annually as the Investment Portfolio matures.

Risks

Investment in property, as with any investment, is not without risk. Specifics include market conditions that may cause the value of an investment to decrease, variable income caused by tenant demand or liquidity as a result of investor demand. The CIPFA Prudential Code identifies the need for ongoing performance and management arrangements which should include procedures to highlight key risks or changes that may affect the security, liquidity and/or yield of the property investment portfolio. CIPFA also provide guidance on the issue of risks in relation to the fair value of the property on the balance sheet, for example where the property value is less than the value of the debt liability. Achieving a balanced portfolio with an appropriate spread of risk over the long term is desired. This could be achieved through a greater number of property investments with diversification across geographical locations, and across the range of property assets.

The principle of balancing risk whilst maximising the return to the Council will be taken in respect of investment opportunities. As consideration is given to new investment opportunities, properties within the county of Oxfordshire or adjoining counties will be preferred however, if a property meets all the investment criteria (and is being funded by existing equity rather than PWLB borrowing), then the location alone should not preclude consideration where it can be objectively demonstrated that there are multiple benefits, including the improvement or development of Oxfordshire, if supported by the Statutory Officers.

Governance

It is proposed that investments in Category D will follow the governance route set out below. Investments in Categories A, B, & C will follow existing governance routes in line with the Council's Constitution and Financial Procedure Rules (FPRs). Categories A & B will require submission of a Capital Business Case or equivalent. However, all categories

will be reported annually as part of the Council's Capital & Investment Strategy as part of the governance of the Council's budget setting process.

The property investment market is competitive and needs consistent and responsive decisions if the Council is going to be successful in managing assets in this environment. It is therefore proposed that a Property Investment Advisory Panel (PIAP) is established to act as an advisory body for these initial decisions. The CIPFA Prudential Code requires that Panel members and officers are competent to take decisions to acquire, hold and dispose of land and buildings, and must have sufficient competence to understand and evaluate the advice that they are given. Consequently, appropriate internal and external training will be given to the PIAP so that they can ensure that decisions fall within the CIPFA Prudential Code, the Council's Corporate Strategy, and are based upon the approved investment matrix (see Annex 2). PIAP will then report their recommendations to Cabinet or Full Council in line with current governance, along with appropriate due diligence to support decision-making. PIAP will be made up of:

Members

- Leader or Deputy Leader of the Council
- Cabinet Member with responsibility for Finance & Property (if this role is separated, both Members are to attend)
- Leader of the Opposition

Officers

- Senior Officer with responsibility for Finance (Section 151 Officer)
- Corporate Director for Commercial Development, Assets and Investment
- Monitoring Officer

The primary purposes of PIAP would be two-fold:

- To consider recommendations from Officers regarding the potential purchase of a property asset, prior to submission of a bid. This would include consideration of the associated risk and yield, and the investment evaluation based on the criteria set out. The ultimate consideration would be whether to submit a bid or not, and at what value.
- To consider the results of the due diligence process, (following acceptance of an offer from Council to purchase an asset), with the ultimate consideration of whether to endorse the purchase and proceed to exchange of contracts.

In the exceptional situation that a decision is required outside of the established protocol, an urgent decision can be taken by the Leader and S151 Officer in consultation with PIAP and the Portfolio Holder for Property and reported to the next available meeting of Cabinet. Where a decision is not time-bound they will go via current governance arrangements and be approved by Cabinet or Full Council as required. On approval of this investment strategy the Financial Regulations will be updated to include the delegated authorities set out above.

Implementation Plan

Although the Property Investment Strategy will enable the Council to respond to opportunities as they arise, there is also a need to continue to develop a programme of planned investment projects linked particularly to Type A investments. Following adoption of this strategy there will likely be a need to resource and forward fund elements of this work. There are also key interdependencies with the evolving Property Strategy that will need to be worked through in order to align activities that impact staff and operational sites.

Annex 1

Management of Investment Portfolio

The Investment portfolio is managed in-house by the Head of Services, Estates, Assets & Investment, reporting to the Director for Joint Property.

The portfolio is managed in two distinct parts, dealing with Investment and Regeneration opportunities separately:

1. Investment Opportunities – Category A & D properties that meet the criteria as set out in the approved investment matrix (See Annex 2) and deliver a financial return to the Council.
2. Regeneration Opportunities – Category B properties that deliver primarily regeneration benefits to the area.

As the Property Investment Portfolio grows in size and the number of property transactions per annum increases, it may be necessary in time, to agree in consultation with the Head of Legal Services, the appointment of a suitable Firm/s of solicitors to provide investment property acquisition services. In addition, it will be necessary to agree with the Head of Procurement the method of payments of Investment Agent introductory fees for Category B & D properties.

Annex 2

Commercial Investment Property Scoring Matrix

The table below sets out the criteria that will be used to assess decisions about commercial investment property. These include location, tenure, tenancy, an assessment of unexpired lease term, repairing liability, rental and capital value as well as the level of management resources required and social value.

Scoring Criteria	Score	4	3	2	1	0	Initial Unweighted Score	Weighted Score
	Weighting Factor	EXCELLENT/ VERY GOOD	GOOD	ACCEPTABLE	MARGINAL	UNACCEPTABLE		
Location - In County / Adjacent to County	20.0	Prime	Good	Secondary	Tertiary	Remote		0
Tenure	15.0	Freehold	150+ year unexpired with no landlord controls	150+ year unexpired with minimal landlord controls	Lease under 150 years	Lease under 100 years		0
Tenancy	10.0	Single tenant with strong financial covenant	Multiple tenants with strong financial covenant	Single tenant with good financial covenant	Multiple tenants with average financial covenants	Tenants with poor financial covenant strength		0
WAULT (Weighted Average Unexpired Lease Term)	10.0	20 years +	15 years +	10 years +	5 years +	Less than 5 years		0
Repairing Liability	5.0	FRI and/or Recoverable via Service Charge	75% + of leases on FRI	50% + of leases on FRI	Internal repairing in good condition, Cap Ex required	Internal Repairing in poor condition, Cap Ex required		0
Rental Analysis	15.0	Significantly under rented (excellent prospects for future rental growth)	Under rented (good prospects for future rental growth)	Rack rented (limited prospects for rental growth)	Rents will fall on lease expiry within 5-10 years	Rents will fall on lease expiry within 3-5 years		0
Capital Value Analysis	15.0	Excellent prospects for future capital growth	Good prospects for future capital growth	Future capital growth likely to be in line with average market returns	Future Capital growth likely to underperform average market	Poor prospects for future capital growth		0
Management Resources	10.0	Minimum. Single tenant	Minimum. Fully let, no more than 3 tenants	Active. Value Add Opportunity	Active. Well managed to date	Active. Historical lack of management		0
Social Value	10.0	Excellent prospects for enhancing social value	Good prospects for enhancing social value	Potential for enhancing social value in the short to medium term	Potential for enhancing social value in the long term	No identified prospects for enhancing social value		0
(Max score = 440, min acceptable score = 220)								0
(anything over 50% is deemed acceptable providing minimum yields are met)								0%

1) Active Investment / Development projects

Property	Site Area
Aston, North Farmhouse	N/A
Banbury, Greenwood Centre	0.25 ha
Benson, Watlington Road	N/A
Bicester, Little Wretchwick Farm	N/A
Chipping Norton, Strategic Development Area (inc Tank Farm and residual land at Rockhill Farm)	36ha
Eynsham Garden Village (Evenlode Farm)	28ha
Eynsham West, (Litchfield Farm)	15.55ha
Faringdon, Youth Centre and Highway Depot to rear	0.29ha
Headington, Maltfield House	N/A
Henley, Chilterns End	0.96 ha
Kidlington, The Moors, Former May's Builders Yard	0.29ha
Oxford, Land at Iffley Mead (adjoining Iffley Academy)	2.04ha
Oxford, Guydens Farm / Northfields	15.62 ha
Oxford, Northfield Hostel	0.70ha
Henley, Bridleway adjoining Gillotts School	N/A
Oxford, Lakefield Road, Littlemore	0.44ha
Oxford, Speedwell House	N/A
Wallingford, Winterbrook Lane	N/A
Wheatley, Access Route to Oxford Brookes University	N/A
Woodstock, Former Library	N/A

2) For Information purposes only – a list of operational properties that are currently being considered for alternative investment purposes

Property	Site Area
Oxford, Rewley Road Fire Station	N/A
Oxford, County Hall	N/A

Oxfordshire County Council Property Strategy

This strategy sets out our approach to property assets and will guide our priorities for managing and developing our estate over the next 5 years.

The purpose of this strategy is to facilitate delivery of the council's corporate plan. It is an enabling strategy and sits alongside our workforce, IT and digital strategies to support the delivery of high-quality, accessible and modern public services for the people of Oxfordshire.

Our ambition is: *To create an efficient, innovative, and accessible property estate that delivers our climate action objectives and explores opportunities for social value. That is supported directly through the delivery of council services or indirectly by generating strong commercial returns. With our customer in front of mind.*

We will develop an agile service delivery model and workforce that has the capacity to meet our needs in a post pandemic environment. Where our services are not bound to buildings and set locations but are accessible remotely and digitally. Where needed we will deliver face to face services in local spaces, places and community venues, in customers' homes and through working in partnership with suppliers, partners and the community and voluntary sector and their bases too. Our property strategy and estate will facilitate this.

We will work hard to minimise journeys, not assuming that customers and colleagues should travel into Oxford City Centre and that the county council should have access and visibility at locations spread across the county.

Our places of work will be welcoming and safe spaces for people to work in agile ways, accessing the right office space and IT equipment to support service delivery at the point it can be most effective. We will also need to create flexible, collaborative spaces for teams, partners, and suppliers to come together for the benefit of our residents.

We understand that some teams will need dedicated spaces to deliver services. Where this is the case, we will seek to develop a range of approaches that enable a combination of buildings based for flexible/agile delivery, supported by technology.

We are an accountable public body and as such our democratic and decision-making processes need to reflect these principles. We will develop an estate that enables a combination of local meetings, virtual public meetings and more traditional council chamber-based meetings with public broadcast to ensure our democracy reflects, enhances and supports our agile delivery model.

There is much uncertainty over the future, but lessons learnt from Covid-19 and its consequential impact upon our needs brings an immediate opportunity to review our estate and accelerate change in how services are delivered the spaces they require.

Our estate is comprised of three categories, and each of these categories has a broad objective:

Investment	Community	Operational
<p>Assets retained for investment purposes (e.g. farms, land for development)</p> <p>Objective: these assets are managed to protect the long-term interests of Oxfordshire and maximise value</p>	<p>Assets used for non-operational purposes (e.g. pre school, playing fields or parish council).</p> <p>Objective: to support policy objectives such as community use and social value whilst generating the best possible tangible and/or intangible returns</p>	<p>Assets used for service delivery (e.g. libraries, fire stations, offices)</p> <p>Objective: to support modern service delivery cost effectively and safely</p>

Our operational property portfolio can be split into three broad categories which are within the scope of this strategy.

Service delivery – buildings/sites which facilitate all our statutory and other front-line services such as community support service centres, children & family centres, libraries, fire stations, depots etc. Some back-office accommodation provision is also included within these buildings/sites too.

Support services – buildings which facilitate all our back office/support related services such as HR, ICT, finance, planning etc. The majority of our workforce are currently based in these buildings.

Partnership working – we will look to explore opportunities to collocate or share our buildings with key strategic partners for the benefit of our communities and drive through efficiencies and help reduce running costs.

The approach to operational buildings that are deemed surplus to requirements will be dealt with via the Investment Strategy along with all community and investment assets.

Our objectives

The key strategic objectives of this strategy are to -

- ***Support excellent service delivery for the community***
 - Provide the right property, in the right place, to meet operational service needs
- ***Deliver Climate Action priorities***
 - Ensure our corporate Climate Action objectives which include making our corporate estate carbon neutral by 2030 are met and establishing the Council as an exemplar to other property owners

- ***Support and empower a more agile organisation***
 - Reduce reliance on desk dominated offices and invest to develop great workplaces – accessible, modern, innovative shared workspaces based on future working principles and in line with our Digital offering i.e. hot desking, collaborative meeting spaces etc
- ***Achieve more value from our assets***
 - Further rationalise our estate to reduce overall cost
 - Prioritise utilisation of freehold assets for front and back office delivery
 - Maximise the value of assets not required for operational purposes to be delivered through effective and creative commercial negotiations and to explore opportunities for social value, to support the council's Investment Strategy
 - Share office space with key strategic partners where it makes sense to do so

Our approach

In delivering these objectives we will apply the following principles in our approach,

1. Embed Climate Action objectives in all decision-making when reshaping the operational estate e.g., minimise travel and avoid use of inefficient buildings
2. Invest to develop great workplaces - modern, innovative and inspiring shared workspaces situated close to transport links to adapt to agile / hybrid working principles and in line with our IT & Digital offering i.e. hot desking, collaborative meeting spaces etc
3. Challenge old ways of working and embrace modern and innovative approaches, including improving customer access and experience.
4. Generate income and ensure the best value for money through the use and development of our estate.
5. Where necessary, where an asset does not contribute to our strategic outcomes, we will maximise our return to dispose and create maximum capital receipt.
6. Work with partners (including through One Public Estate) to maximise shared opportunities including co-location.
7. Encourage/establish a smaller presence in all key localities, instead of a single 'big HQ' approach.
8. Release leasehold property where appropriate so we reduce our rental expenditure.

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CAPITAL INVESTMENT PLANNING 2021/22 - 2031/32
CHANGES TO EXISTING CAPITAL PROGRAMME

Strategy - Capital Investment Need	Budget	Revenue Reserves	Specific Funding	Prudential Borrowing
	£'000	£'000	£'000	£'000
Pupil Places				
Basic Need & Special Educational Needs & Disabilities (SEND)	6,932	0	6,932	0
Annual Programmes - Including Additional Year 2031/32	5,550	0	5,550	0
Pupil Places - Total	12,482	0	12,482	0
Major Infrastructure				
Zero Emission Buses Regional Areas (ZEBRA)	6,000	6,000	0	0
A423 Improvements Programme (incorporating Kennington Bridge)	37,185	0	10,000	27,185
Major Infrastructure Programme Contingency	50,000	0	0	50,000
Major Infrastructure - Total	93,185	6,000	10,000	77,185
Highways				
Structural Maintenance - Additional Year 2031/32	15,200	0	15,200	0
Part 6 - Moving Vehicle Violations - Cameras	2,700	0	1,400	1,300
Highway Bridges Recovery Programme	2,750	0	0	2,750
20mph Speed Limit Signage	8,000	8,000	0	0
Public Rights of Way (PROW)	800	0	800	0
Contribution towards Broad Street Pedestrianisation	500	0	0	500
Highway Improvements (Developer Funded)	205	0	205	0
Highways - Total	30,155	8,000	17,605	4,550

Strategy - Capital Investment Need	Budget	Revenue Reserves	Specific Funding	Prudential Borrowing
	£'000	£'000	£'000	£'000
Property				
Investment Strategy	5,500	0	0	5,500
Corporate Estate				0
Estate Decarbonisation, Condition, Asset Management Programme	1,000	0	0	1,000
Service Requirements	12,000	0	1,000	11,000
Property - Total	18,500	0	1,000	17,500
Digital Infrastructure	0	0	0	0
Digital Infrastructure - Total	0	0	0	0
Vehicles and Equipment				
Fire & Rescue Service (Vehicles) - Additional Year 2031/32	800	0	800	0
Vehicles and Equipment - Total	800	0	800	0
Passported Funds				
Disabled Facilities Grant 2022/23	6,658	0	6,658	0
Passported Funds - Total	6,658	0	6,658	0
TOTAL PROPOSED STRATEGY ALLOCATIONS	161,780	14,000	48,545	99,235
General Funding & Accounting				
Changes:				
Additional / Increase in S106 / CIL Contributions				-5,293
2020/21 Outturn Savings				-4,500
Forecast changes in Annual Grant Allocations				-1,002
General Funding & Accounting - Total				-10,795
Prudential Borrowing Requirement				88,440

Capital Programme 2021/22 to 2031/32

Strategy/Programme	Capital Investment Programme (latest forecast)						CAPITAL INVESTMENT TOTAL £'000s	
	Current Year 2021 / 22 £'000s	Firm Programme		Provisional Programme				
		2022 / 23 £'000s	2023 / 24 £'000s	2024 / 25 £'000s	2025 / 26 £'000s	up to 2031 / 32 £'000s		
Pupil Places	37,835	47,915	38,954	36,325	10,399	75,452	246,880	
Major Infrastructure	65,389	153,618	184,471	205,200	68,958	10,239	687,875	
Highways Asset Management Plan	42,773	55,285	52,309	22,350	16,918	88,949	278,584	
Property & Estates, and Investment Strategy	11,378	21,090	26,426	12,072	4,500	8,876	84,342	
Passport Funding	7,660	10,216	4,636	2,100	250	5,219	30,081	
Vehicles & Equipment	31,156	8,744	1,000	950	750	2,700	45,300	
600	800	2,260	950	800	800	4,800	10,410	
TOTAL ESTIMATED CAPITAL PROGRAMME EXPENDITURE	196,991	299,128	308,746	279,797	102,575	196,235	1,383,472	
Earmarked Reserves	0	1,000	11,600	5,400	47,879	28,757	94,636	
TOTAL ESTIMATED CAPITAL PROGRAMME	196,991	300,128	320,346	285,197	150,454	224,992	1,478,108	
TOTAL ESTIMATED PROGRAMME IN-YEAR RESOURCES	221,112	261,231	261,625	272,699	141,958	221,290	1,379,915	
In-Year Shortfall (-) / Surplus (+)	24,121	-38,897	-58,721	-12,498	-8,496	-3,702	-98,193	
Cumulative Shortfall (-) / Surplus (+)	98,193	122,314	83,417	24,696	12,198	3,702	0	

SOURCES OF FUNDING	2021 / 22	2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32	CAPITAL RESOURCES TOTAL £'000s
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	
SCE(C) Formulaic Capital Allocations - Un-ringfenced Grant	54,101	93,812	39,735	21,500	21,500	127,200	357,848
Devolved Formula Capital- Grant	750	700	650	600	400	800	3,900
Prudential Borrowing	65,590	63,322	84,354	34,088	62,034	4,877	314,265
Grants	43,555	92,005	97,289	139,751	47,963	992	421,555
Developer Contributions / CIL	31,931	44,066	43,461	64,427	6,592	45,869	236,346
Other External Funding Contributions	36	273	11	6,463	599	0	7,382
Revenue Contributions	1,000	5,950	17,950	3,950	950	8,839	38,639
Schools Contributions	28	0	0	0	0	0	28
Use of Capital Receipts	0	0	32,493	1,920	1,920	32,713	69,046
Use of Capital Reserves	0	0	4,403	12,498	8,496	3,702	29,099
TOTAL ESTIMATED PROGRAMME RESOURCES UTILISED	196,991	300,128	320,346	285,197	150,454	224,992	1,478,108
TOTAL ESTIMATED IN YEAR RESOURCES AVAILABLE	221,112	261,231	261,625	272,699	141,958	221,290	1,379,915
Capital Grants Reserve C/Fwd	43,993	63,986	22,785	0	0	0	0
Usable Capital Receipts C/Fwd	25,101	29,229	31,533	0	0	0	0
Capital Reserve C/Fwd	29,099	29,099	29,099	24,696	12,198	3,702	0

PUPIL PLACES CAPITAL PROGRAMME

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s
		Current Year 2021 / 22 £'000s	Firm Programme			Provisional Programme			
			2022 / 23 £'000s	2023 / 24 £'000s	2024 / 25 £'000s	2025 / 26 £'000s	up to 2031 / 32 £'000s		
<u>Provision of School Places (Basic Need)</u>									
Existing Demographic Pupil Provision (Basic Needs Programme)	1,658	495	7,440	13,251	9,800	8,000	63,682	104,326	
1/21/22 - 20/21 Basic Need Programme Completions	0	125	0	0	0	0	479	604	
Cholsey - Expansion to 2FE (ED911)	1,365	830	0	0	0	0	107	2,302	
St Blaise - Expansion to 1FE (ED860)	2,036	1,250	604	0	0	0	0	3,890	
St Andrew's, Chinnor - Expansion to 2FE (ED920)	1,191	300	0	0	0	0	56	1,547	
Five Acres - Repl Temporary Accommodation (ED912)	721	550	50	0	0	0	36	1,357	
Manor, Long Hanborough - Expansion to 1.5FE (ED909)	2,206	1,300	50	0	0	0	24	3,580	
Bardwell - Expansion (ED935)	407	950	143	0	0	0	0	1,500	

Project/ Programme Name	Previous Years Actual Expenditure	Latest Forecast							Total Scheme Cost	
		Current Year	Firm Programme			Provisional Programme				
			2021 / 22	2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32		
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	
Wallingford - Expansion by 2FE (ED896)	674	4,700	1,100	461	0	0	0	0	6,935	
Stanton Harcourt - Expansion to AN20 (ED957)	71	550	0	0	0	0	0	22	643	
William Morris - Improvements to Support 1FE & Repl Temporary Classrooms (ED951)	118	1,500	382	0	0	0	0	0	2,000	
Wicknield - 1FE Temporary Accommodation (ED961)	121	1,250	187	0	0	0	0	0	1,558	
John Watson Secondary (ED934)	277	1,900	500	13	0	0	0	0	2,690	
BGN - 2FE Expansion (ED933)	339	2,000	3,500	1,570	0	0	0	0	7,409	
St Nicholas, East Challow (ED959) - Lower age range to 3-11	48	650	44	0	0	0	0	0	742	
Radley - Expansion to 1FE (ED936)	198	1,150	2,000	205	0	0	0	0	3,553	
Provision of School Places Total	11,430	19,500	16,000	15,500	9,800	8,000	64,406	144,636		

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Project/ Programme Name	Previous Years Actual Expenditure	Latest Forecast							Total Scheme Cost	
		Current Year	Firm Programme		Provisional Programme					
		2021 / 22	2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	
<u>Growth Portfolio - New Schools</u>										
West Witney, Curbridge (Windrush) - 1.5FE Primary School (ED927)	122	275	25	0	0	0	278	700		
Orion (formerly Northfield) Special School - Replacement & Expansion (ED940)	6,760	5,700	340	0	0	0	0	12,800		
Farngdon - 2FE Primary School (ED943)	545	6,000	3,000	579	0	0	0	10,124		
Leicester, Graven Hill - 2FE Primary School (ED919)	130	25	150	300	395	0	0	1,000		
Wallingford - 2FE Primary School (ED930)	71	250	300	5,500	2,000	599	0	8,720		
NE Didcot - 2FE Primary School (ED929)	33	700	9,500	2,400	227	0	0	12,860		
Shrivenham - 1.5FE Primary School (ED945)	33	975	7,000	1,850	342	0	0	10,200		
Grove Airfield - 2FE Primary School No. 1 (ED963)	30	25	2,000	900	145	0	0	3,100		

Project/ Programme Name	Previous Years Actual Expenditure	Latest Forecast							Total Scheme Cost	
		Current Year	Firm Programme		Provisional Programme					
		2021 / 22	2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	
Grove Airfield - Secondary School (ED965)	2	200	200	200	21,028	0	0	21,630		
St Edburg's Primary School - Expansion to 3FE (ED955)	7	150	3,250	6,750	188	0	0	10,345		
SEND Free School - Faringdon (ED985)	0	25	50	925	200	0	0	1,200		
Project Development Budget	27	0	50	50	50	50	173	400		
New School Programme Completions	0	400	0	0	0	0	1,021	1,421		
Growth Portfolio Total	7,760	14,725	25,865	19,454	24,575	649	1,472	94,500		

Project/ Programme Name	Previous Years Actual Expenditure	Latest Forecast							Total Scheme Cost	
		Current Year	Firm Programme		Provisional Programme					
		2021 / 22	2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	
<u>Annual Programmes</u>										
Schools Access Initiative	0	175	250	200	200	200	1,275	2,300		
Temporary Classrooms - Replacement & Removal	0	25	100	200	200	200	1,275	2,000		
School Structural Maintenance	0	3,300	5,450	3,350	1,300	1,100	5,550	20,050		
Annual Programme Total	0	3,500	5,800	3,750	1,700	1,500	8,100	24,350		
<u>Early Years Programmes</u>										
Capacity Building - Early Yrs Entitlement	0	110	250	250	250	250	759	1,869		
Early Years Programme Total	0	110	250	250	250	250	759	1,869		
Retentions Total	1,407	0	0	0	0	0	715	2,122		
PUPIL PLACES CAPITAL PROGRAMME EXPENDITURE TOTAL										
	20,597	37,835	47,915	38,954	36,325	10,399	75,452	267,477		

MAJOR INFRASTRUCTURE CAPITAL PROGRAMME

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year		Firm Programme		Provisional Programme				
		2021 / 22 £'000s	2022 / 23 £'000s	2023 / 24 £'000s	2024 / 25 £'000s	2025 / 26 £'000s	up to 2031 / 32 £'000s			
<u>HIF1</u>										
HIF1 A4130 Dualing	1,442	1,200	3,400	4,400	12,851	0	0	23,293		
HIF1 Didcot Science Bridge	1,509	1,650	6,000	16,000	27,000	5,271	0	57,430		
<u>HIF1</u>										
HIF1 Culham river crossing	2,663	3,450	8,000	5,000	71,000	34,803	0	124,916		
<u>HIF1</u>										
HIF1 Clifton Hampden bypass	1,359	1,400	3,800	9,500	12,169	0	0	28,228		
<u>HIF1</u>										
HIF1 DGT OBC development	591	0	0	0	0	0	0	591		
HIF1 LOCALITY PROGRAMME TOTAL	7,564	7,700	21,200	34,900	123,020	40,074	0	234,458		
<u>HIF2 & A40</u>										
A40 Oxford North (N G'way)	2,232	6,200	8	0	0	0	0	8,440		
Oxford Science Transit Phase 2 - A40 Public Transport improvements	5,674	4,150	22,000	13,000	6,676	0	0	51,500		
<u>HIF2</u>										
HIF2 West Oxon A40 Smart Corridor	3,884	11,500	19,000	50,000	22,372	0	0	106,756		
<u>A40</u>										
A40 Access to Witney - Shores Green	477	2,550	7,000	3,700	198	0	0	13,925		

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
			2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s		
B4044 Strategic Cycle Improvement (Development Budget)	66	200	104	0	0	0	0	0	370	
Salt Cross to Eynsford Underpass (Development Budget)	0	250	0	0	0	0	0	0	250	
HIF2 & A40 LOCALITY PROGRAMME TOTAL	12,333	24,850	48,112	66,700	29,246	0	0	181,241		
<u>BANBURY & BICESTER</u>										
NW Bicester A4095 Underbridge & Underpass	4,837	5,750	1,300	1,300	1,313	0	0	14,500		
NW Bicester A4095 Road Realignment	343	1,219	0	0	0	0	0	1,562		
NW Bicester A4095 Road Roundabout Improvements	200	750	4,200	350	0	0	0	5,500		
M40 J10 Improvements	63	350	6,500	11,500	467	0	0	18,880		
Access to Banbury North: A422 Hennef Way (Development Budget)	263	250	587	0	0	0	0	1,100		
Ploughley Rd / A41 Junction Improvements, Bicester	196	550	2,800	254	0	0	0	3,800		
Tramway Rd, Accessibility Improvements	163	500	2,500	1,404	0	0	0	4,567		
A361 Road Safety Improvements	5,070	43	0	0	0	0	0	5,113		

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
			2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s		
Bicester Perimeter Road (Development Budget)	0	250	500	250	0	0	0	1,000		
Farmfield Road / Oxford Road - Junction Improvement (Development Budget)	4	250	500	241	0	0	0	995		
London Road, Bicester: Cycle Improvements	0	25	400	127	0	0	0	552		
423 Improvements Programme (incorporating Kennington Bridge)	1,246	1,250	5,800	28,000	28,000	24,000	1,889	90,185		
BANBURY & BICESTER LOCALITY PROGRAMME TOTAL	12,385	11,187	25,087	43,426	29,780	24,000	1,889	147,754		
<u>OXFORD</u>										
Eastern Arc Phase 1 Access to Headington	17,321	75	119	0	0	0	0	17,515		
Oxford, Botley Rd	4,436	4,100	1,000	118	0	0	0	9,654		
Oxpens to Osney Mead Cycle	5,903	25	72	0	0	0	0	6,000		
Oxford Quiet Connector Cycling & Walking Routes	1,114	0	1,250	557	0	0	0	2,921		

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
			2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s		
Banbury Rd Improvements (Banbury Rd Corridor)	108	650	1,650	100	7,100	2,392	0	12,000		
Woodstock Rd Improvements (Woodstock Rd Corridor)	112	900	4,500	6,500	488	0	0	12,500		
Connecting Oxford (Development Budget)	210	300	900	192	0	0	0	1,602		
A44 Corridor Improvements (Peartree & Cassington Roundabouts)	894	1,800	10,000	1,836	0	0	0	14,530		
North Oxford Corridors - Kidlington	40	800	5,000	160	0	0	0	6,000		
Riverside routes to Oxford city centre	2,226	875	930	0	0	0	0	4,031		
Active Travel Phase 2	384	2,200	2,000	65	0	0	0	4,649		
Walton Street	0	50	100	0	0	0	0	150		
Oxford Zero Emission Zone	79	300	400	362	48	0	0	1,189		
Oxford Controlled Parking Zones	0	0	500	500	335	0	0	1,335		
OXFORD LOCALITY PROGRAMME TOTAL	32,827	12,075	28,421	10,390	7,971	2,392	0	94,076		

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
			2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
<u>SOUTH & VALE</u>										
Watlington Relief Rd	255	725	1,000	4,500	2,020	0	0	8,500		
Benson Relief Rd	486	325	2,800	389	0	0	0	4,000		
Milton Heights Bridge	87	150	3,500	2,400	1,051	0	0	7,188		
Wantage Eastern Link Rd (Phase 1-2 Contribution, P3)	72	2,550	6,250	202	0	0	0	9,074		
Elliford Junction & Relief to Marcham (Development Budget)	77	200	400	600	223	0	0	1,500		
Relief to Rowstock	245	500	300	600	7,400	1,755	0	10,800		
Science Vale Cycle Network Improvements	5,157	250	443	0	0	0	0	5,850		
Didcot Northern Perimeter Road 3 (Development Budget)	562	125	63	0	0	0	0	750		
A34 Lodge Hill Slips	1,523	1,950	10,500	13,500	336	0	0	27,809		
Golden Balls Roundabout A4074/B4015 (Development Budget)	0	375	400	225	0	0	0	1,000		

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
			2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s		
Didcot Garden Town: Corridor & Jubilee Way (Development Budget)	0	100	250	650	0	0	0	1,000		
A40 Minster Lovell, Access to Carterton (Development Budget)	0	0	0	710	0	0	0	710		
A420 Coxwell Road Junction	0	0	467	467	816	0	0	1,750		
Carterton Crossroads Improvements	0	0	125	275	0	0	0	400		
A4130 Widening (Steventon Lights to Milton Interchange)	0	0	200	400	1,400	0	0	2,000		
Science Vale Cycle NetworkPhase 2 (Development Budget)	0	0	200	200	600	0	0	1,000		
Abingdon LCWIP	0	0	200	200	600	0	0	1,000		
SOUTH & VALE LOCALITY PROGRAMME TOTAL	8,464	7,250	27,098	25,318	14,446	1,755	0	84,331		
MAJOR INFRASTRUCTURE LOCALITY TOTAL	73,573	63,062	149,918	180,734	204,463	68,221	1,889	741,860		

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
			2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
<u>COUNTYWIDE AND OTHER</u>										
East-West Rail (contribution)	189	1,400	700	737	737	737	6,555	11,055		
Zero Emission Bus Regional Areas (ZEBRA)	0	0	3,000	3,000	0	0	0	6,000		
City Deal, Pinch Point, Local Growth Programmes - Completed Schemes	0	927	0	0	0	0	1,589	2,516		
Other Completed schemes	0	0	0	0	0	0	206	206		
COUNTYWIDE AND OTHER INTEGRATED TRANSPORT TOTAL	189	2,327	3,700	3,737	737	737	8,350	19,777		
MAJOR INFRASTRUCTURE CAPITAL PROGRAMME EXPENDITURE TOTAL	73,762	65,389	153,618	184,471	205,200	68,958	10,239	761,637		

HIGHWAYS ASSET MANAGEMENT PLAN CAPITAL PROGRAMME

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
			2022 / 23 £'000s	2023 / 24 £'000s	2024 / 25 £'000s	2025 / 26 £'000s	up to 2031 / 32 £'000s			
<u>STRUCTURAL MAINTENANCE PROGRAMME</u>										
Carriageways	0	7,025	8,500	9,200	4,000	4,000	21,125	53,850		
Surface Treatments	0	7,150	5,300	4,700	2,400	2,500	11,000	33,050		
Structural Highway Improvements	0	8,320	5,800	5,800	3,000	3,000	15,000	40,920		
Footways & Cycleways	0	1,000	1,000	1,200	400	400	2,000	6,000		
Drainage	0	1,800	1,800	2,000	750	750	3,625	10,725		
Bridges	0	2,300	4,000	4,000	1,500	1,600	7,500	20,900		
Public Rights of Way	0	285	300	300	125	125	625	1,760		
Electrical	0	1,000	1,325	1,425	625	500	2,875	7,750		
Traffic Signals	0	500	0	0	0	0	0	500		
Section 42 contributions	0	1,700	1,700	1,700	750	750	3,750	10,350		
Safety Fences	0	75	75	750	100	100	500	1,600		

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22 £'000s	Firm Programme		Provisional Programme					
			2022 / 23 £'000s	2023 / 24 £'000s	2024 / 25 £'000s	2025 / 26 £'000s	up to 2031 / 32 £'000s			
Minor Works: Traffic Schemes	0	430	430	430	200	200	1,000	2,690		
Structural Maintenance Programme 2031/32	0	0	0	0	0	0	15,200	15,200		
STRUCTURAL MAINTENANCE ANNUAL PROGRAMMES TOTAL	0	31,585	30,230	31,505	13,850	13,925	84,200	205,295		
<u>IMPROVEMENT PROGRAMMES</u>										
Accessibility & Road Safety Schemes	0	1,738	2,000	2,000	2,000	753	0	8,491		
Bus Journey Time Reliability	0	1,000	1,000	1,000	1,000	40	0	4,040		
IMPROVEMENT PROGRAMMES TOTAL	0	2,738	3,000	3,000	3,000	793	0	12,531		
<u>Major schemes and other programme</u>										
Street Lighting LED replacement	4,409	5,850	18,000	12,554	0	0	0	40,813		
Part 6 Moving Vehicles Violations Cameras	0	0	300	500	500	200	1,200	2,700		
Highways Bridges Recovery Programme	0	0	250	500	1,000	1,000	0	2,750		
20mph Speed Limit	0	0	2,000	3,000	3,000	0	0	8,000		
Broad Street	0	0	250	250	0	0	0	500		

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							
		Current Year 2021 / 22 £'000s	Firm Programme		Provisional Programme			Total Scheme Cost £'000s	
			2022 / 23 £'000s	2023 / 24 £'000s	2024 / 25 £'000s	2025 / 26 £'000s	up to 2031 / 32 £'000s		
Tetsworth Embankment Works	2,313	40	270	0	0	0	0	2,623	
Oxford Rd, Banbury	871	126	0	0	0	0	105	1,102	
Kennington Railway Bridge	3,246	1,332	85	0	0	0	0	4,663	
Network Rail Electrification Bridge Betterment Programme	499	0	0	0	0	0	1,767	2,266	
Completed Major Schemes	0	0	0	0	0	0	593	593	
STRUCTURAL MAINTENANCE MAJOR SCHEMES TOTAL	11,338	7,348	21,155	16,804	4,500	1,200	3,665	66,010	
OTHER MAINTENANCE PROGRAMMES/PROJECTS									
Public Rights of Way (developer and Other funded)	0	0	100	200	200	200	100	800	
Small schemes (developer and other funded)	0	1,102	800	800	800	800	984	5,286	
OTHER MAINTENANCE PROGRAMMES/PROJECTS TOTAL	0	1,102	900	1,000	1,000	1,000	1,084	6,086	
HIGHWAYS ASSET MANAGEMENT PLAN CAPITAL PROGRAMME EXPENDITURE TOTAL	11,338	42,773	55,285	52,309	22,350	16,918	88,949	289,922	

PROPERTY & ESTATES, AND INVESTMENT STRATEGY CAPITAL PROGRAMME

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22 £'000s	Firm Programme		Provisional Programme					
			2022 / 23 £'000s	2023 / 24 £'000s	2024 / 25 £'000s	2025 / 26 £'000s	up to 2031 / 32 £'000s			
<u>CORPORATE ESTATE DEVELOPMENT PROGRAMME</u>										
Carterton Community Safety Centre	64	300	3,300	848	0	0	0	4,512		
Bicester Library (CS13)	960	250	240	0	0	0	0	1,450		
Westgate Library - Redevelopment	3,113	25	200	0	0	0	262	3,600		
Adult Social Care Programme	0	0	0	0	0	0	3,689	3,689		
Aston Children's Home (ED932)	135	250	1,600	565	0	0	0	2,550		
Blackbird Leys Regeneration (Relocate Library)	0	50	100	850	0	0	0	1,000		
Didcot Library & Community Hub (CS19)	28	0	75	775	722	0	0	1,600		
New Salt Store & Accommodation (R20)	2,200	0	100	2,655	0	0	0	4,955		
Drayton Depot	0	360	540	100	0	0	0	1,000		
Bampton Library Improvements (PE40)	0	90	0	0	0	0	0	90		

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
			2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
BIPC (Westgate) (PE42)	0	73	0	0	0	0	0	73		
Collaborative Asset Management Programme	0	0	500	1,000	2,000	1,000	0	4,500		
Service Requirements	0	0	1,250	2,000	4,800	2,500	1,450	12,000		
CORPORATE ESTATE DEVELOPMENT PROGRAMME TOTAL	6,500	1,398	7,905	8,793	7,522	3,500	5,401	41,019		
CLIMATE ACTION PROGRAMME										
SALIX Energy Programme	0	50	150	150	150	150	80	730		
Electric Vehicles Charging Infrastructure	100	10	0	0	0	0	0	110		
One-Fleet EV Charging Point	11	0	100	289	0	0	0	400		
Climate Action Recycling Fund	0	0	0	500	500	600	900	2,500		
Green Homes Grant	0	1,500	0	0	0	0	0	1,500		
Car Parks - Electrical Vehicle Charging Points	0	1,199	0	0	0	0	0	1,199		
CLIMATE ACTION PROGRAMME TOTAL	111	2,759	250	939	650	750	980	6,439		

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast						
		Current Year 2021 / 22	Firm Programme		Provisional Programme			Total Scheme Cost £'000s
			2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32	
<u>CORPORATE ESTATE CONDITION (Non-School) PROGRAMMES</u>								
Minor Works Programme	0	400	250	250	0	0	297	1,197
Health & Safety (Non-Schools)	0	75	800	250	250	250	1,500	3,125
Defect Liability Programme	5,056	4,000	3,000	2,944	0	0	0	15,000
Public Sector De-Carbonisation Grant Programme	0	2,000	135	0	0	0	0	2,135
State Decarbonisation / Condition Programme	0	50	1,000	2,000	950	0	0	4,000
CORPORATE ESTATE CONDITION PROGRAMMES TOTAL	5,056	6,525	5,185	5,444	1,200	250	1,797	25,457
<u>INVESTMENT STRATEGY</u>								
Planning Consents Programme	0	0	750	750	0	0	0	1,500
Office Rationalisation & Co-location Programme	0	0	2,000	2,000	700	0	0	4,700
Building & Site Enhancements Programme	0	0	3,000	6,000	2,000	0	0	11,000
Resonance Fund	0	500	2,000	2,500	0	0	0	5,000

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
		2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32				
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	
Purchase of Land	7	0	0	0	0	0	0	437	444	
INVESTMENT STRATEGY PROGRAMME	7	500	7,750	11,250	2,700	0	0	437	22,644	
TOTAL										
<u>WASTE MANAGEMENT PROGRAMME</u>										
Waste Recycling Centre Infrastructure Programme	0	196	0	0	0	0	0	0	196	
TOTAL										
<u>WASTE MANAGEMENT PROGRAMME</u>										
TOTAL										
Retentions (completed schemes)	0	0	0	0	0	0	0	261	261	
PROPERTY & ESTATES, AND INVESTMENT STRATEGY CAPITAL PROGRAMME EXPENDITURE TOTAL	11,674	11,378	21,090	26,426	12,072	4,500	8,876	96,016		

ICT STRATEGY CAPITAL PROGRAMME

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year	Firm Programme		Provisional Programme					
		2021 / 22	2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
ICT STRATEGY PROGRAMME										
Children Services - ICT (Phase 1&2)	313	2,350	425	200	0	0	49	3,337		
Broadband for Businesses in Rural Oxfordshire (BiRO)	853	1,000	4,000	461	0	0	0	6,314		
Rural Gigabit Hub Site	0	500	4,000	2,500	1,000	0	0	8,000		
Digital Infrastructure	4,599	3,810	1,791	1,475	1,100	250	5,170	18,195		
ICT STRATEGY PROGRAMME EXPENDITURE TOTAL		5,765	7,660	10,216	4,636	2,100	250	5,219	35,846	

PASSPORTED FUNDING CAPITAL PROGRAMME

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
		£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s		
THIRD PARTY GROWTH & HOUSING DEAL										
<u>Local Growth Fund</u>										
LGF - Remaining Projects	0	5,858	0	0	0	0	0	0	5,858	
<u>Getting Building Fund</u>	264	7,453	736	0	0	0	0	0	8,453	
<u>Housing Deal</u>										
Housing	25,467	10,000	0	0	0	0	0	0	35,467	
THIRD PARTY GROWTH & HOUSING DEAL TOTAL	25,731	23,311	736	0	0	0	0	0	49,778	
PASSPORTED FUNDING										
<u>Disabled Facilities Grant</u>										
Disabled Facilities Grant	0	6,658	6,658	0	0	0	0	0	13,316	
<u>Public Health</u>										
PHE Wayfinding Grant	0	52	0	0	0	0	0	0	52	

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year 2021 / 22	Firm Programme		Provisional Programme					
			2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	
<u>Schools Capital</u>										
Devolved Formula Capital	0	750	700	650	600	400	800	3,900		
PASSPORTED FUNDING TOTAL	0	7,460	7,358	650	600	400	800	17,268		
<u>SPECIALIST HOUSING & FINANCIAL ASSISTANCE</u>										
SH - New Schemes & Adaptations to Existing Properties	0	250	550	250	250	250	1,750	3,300		
Refereed Interest Loans (CSDP)	0	50	50	50	50	50	100	350		
Loans to Foster/Adoptive Parents	0	85	50	50	50	50	50	335		
SPECIALIST HOUSING & FINANCIAL ASSISTANCE TOTAL	0	385	650	350	350	350	1,900	3,985		
PASSPORT FUNDING PROGRAMME EXPENDITURE TOTAL	25,731	31,156	8,744	1,000	950	750	2,700	71,031		

VEHICLES & EQUIPMENT CAPITAL PROGRAMME

Project/ Programme Name	Previous Years Actual Expenditure £'000s	Latest Forecast							Total Scheme Cost £'000s	
		Current Year	Firm Programme		Provisional Programme					
		2021 / 22	2022 / 23	2023 / 24	2024 / 25	2025 / 26	up to 2031 / 32			
<u>Vehicles & Equipment</u>										
Fire Protective Equipment	0	0	700	50	0	0	0	750		
F&RS Vehicles replacement	0	800	800	800	800	800	4,800	8,800		
RFID Kiosk Replacement	0	0	500	100	0	0	0	600		
Library Furnishing Enhancement Programme (PE41)	0	0	260	0	0	0	0	260		
VEHICLES & EQUIPMENT CAPITAL PROGRAMME EXPENDITURE TOTAL	0	800	2,260	950	800	800	4,800	10,410		

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Divisions Affected - All

PERFORMANCE AND CORPORATE SERVICES OVERVIEW AND SCRUTINY COMMITTEE

17 JANUARY 2022

CONSULTATION AND ENGAGEMENT STRATEGY 2022 - 2025

Report by Corporate Director Customers, Organisational Development and Resources

RECOMMENDATION

The Committee is RECOMMENDED to

- a) consider the contents of the draft strategy and provide feedback to the Cabinet lead member for corporate services, the corporate director for customers organisational development and resources and supporting officers; and
- b) endorse the content of the strategy.

Executive summary

1. The purpose of this report is to provide an overview of the draft consultation and engagement strategy 2022 - 2025, which will be considered at Cabinet on 15 February 2022.

Aims and approach of the strategy

2. The strategy sets out a new approach to consultation and engagement at Oxfordshire County Council, putting residents at the heart of decision-making to support strong active and inclusive communities.
3. It has two key aims:
 - a) To engage with and listen to residents and other partners in a more active and inclusive way. This includes listening to what residents value most, involving them in conversations about the things that affect them, and then using that feedback to help shape or improve services.
 - b) To widen the council's reach so that we listen to diverse communities and audiences. This includes those whose voices are seldom heard, such as young people and the digitally excluded.

4. To achieve these twin aims, a range of ways will be provided for residents to have their say, across multiple channels, both on and offline. This will include using new methodologies and being more proactive – so going to the places where we can reach residents and stakeholders, rather than expecting them to come to us.
5. The strategy also outlines the guiding principles for participation in all consultation or engagement activities and seeks to build on good practice both within the council and outside.

Implementation and monitoring progress

6. A detailed action plan, with clear targets and measures, has been developed to ensure that progress is on track and there is a continued commitment to two-way engagement with residents. The action plan covers the period to the end of 2022/23 and will be updated on an annual basis.
7. A summary of the key actions for 2022/23 is set out at the end of the strategy document. This focuses on building the right foundations, enabling two-way conversations, expanding the council's reach and being inclusive.

Financial Implications

There are no immediate financial implications arising from this strategy.

Prem Salhan
Interim Finance Business Partner – CODR & CDAI

Legal Implications

The strategy does not raise any legal implications.

CLaire Taylor, Corporate Director, Customers, Organisational Development and Resources

Annexes: Consultation and engagement strategy 2022 – 2025 Consultation and engagement strategy action plan 2022/23

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January 2022

DRAFT

Consultation and engagement strategy 2022 - 2025

Foreword

Following the local elections in May 2021, the Oxfordshire Fair Deal Alliance formed to lead the county council. Our vision is to lead positive change by working in partnership to make Oxfordshire a greener, fairer and healthier county. Nine priorities have been created to deliver this aim, which will form the foundations of a new strategic plan for the council.

As part of 'playing our part in a vibrant and participatory local democracy', and 'tackling inequalities in Oxfordshire', the county council has made a commitment to taking decisions in an open and inclusive way. This marks the start of a new longer-term approach to consultation and engagement, which aims to engage with and listen to residents and other partners in a more active and inclusive way.

The council's new consultation and engagement strategy outlines this new approach, putting residents at the heart of decision-making to support strong, active and inclusive communities. It includes examples of best practice and the guiding principles for participation in all consultation or engagement activities. It also includes the launch of a series of ongoing public engagement events called 'Oxfordshire Conversations' in spring 2022.

As always, we are open to listening and look forward to hearing from all our communities across Oxfordshire.

Councillor Glynis Phillips
Cabinet Member for Corporate Services

Overall approach

1. The council is strongly committed to improving its approach to how we consult and engage with our residents and diverse communities. That includes actively listening to what residents value most, involving them in conversations about the things that affect them and using this feedback to help shape or improve services – both in design and delivery.
2. Oxfordshire County Council's consultation and engagement approach will build on good practice both within the council and outside. The overall council vision is to create a range of opportunities that expand the council's broadcast communications to conversations and two-way engagement. For consultation and engagement activities, these opportunities will ensure we are inclusive, widening our reach to hear from and listen to diverse communities and audiences. A core focus is listening to what local people say and what really matters to them. This requires a whole organisational response and commitment.

3. This is in addition to continuing to meet more standard requirements for regular consultations, for example highway public notices, planning applications and traffic regulation orders.

4. **Our goals:**

- a. Expand from broadcast communications to two-way engagement and active listening.
 - b. Grow and widen our audience reach using digital channels that offer opportunities for more people to have their say and for quality engagement in multiple ways.
 - c. Be inclusive when seeking the views of residents; this includes reaching the seldom-heard such as young people, vulnerable adults and those who are digitally excluded.
 - d. Demonstrate where we have taken the views of consultees into account in our decision making.
5. We will achieve this by providing a range of ways that residents can have their say, across multiple channels, both on and offline. This will include using new methodologies and being more proactive, going to the places where we can reach residents and stakeholders, particularly to gather the views of those seldom-heard, rather than expecting them to come to us. Our approaches and use of methodologies can evolve and develop over the short and the long-term.

Building the foundations

6. To meet the short-term improvement challenge, two key pieces of work are key:
 - a. Embed and develop the use of a new digital consultation and engagement platform across the council.
 - b. Refresh the council's best practice consultation and engagement guidance.

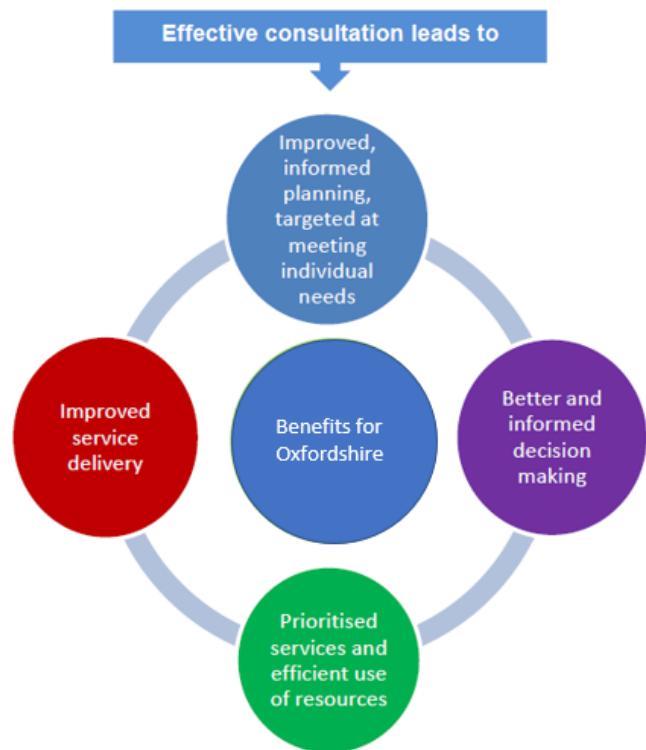
A new digital consultation and engagement platform

7. 'Let's Talk Oxfordshire' is the council's new digital consultation and engagement platform, which offers multiple digital ways of engaging and consulting people, including map tools; ideas forums/boards; discussion groups; surveys; quality data analysis; as well as a modern, mobile responsive and accessible web presence.
8. Content on the site needs to be developed and grow and service leads need to be trained in its use. The communications, engagement and marketing team will lead this training and will maintain oversight as the 'superusers' and champions of best practice. The platform will help us grow our online audiences and, together when integrating with existing and new channels, will help to deliver dynamic tailored news and consultation and engagement opportunities of interest to residents.

A refresh of the council's best practice consultation and engagement guidance

9. A refresh of the council's best practice consultation and engagement guidance is required for staff and leaders to support the change in our consultation and engagement approach and the use of Let's Talk Oxfordshire.
10. As the professional leads, the communications, marketing and engagement team will continue to champion and advise on best practice standards and commitments when planning consultation and engagement activity. However, a new wider commitment to these standards needs to be upheld by the leadership team and the whole organisation. This will mark a new approach.
11. **So what is consultation and engagement?** The terms consultation, involvement and engagement are often used interchangeably. All three are about listening to the views of local people to shape services, develop policy or take action. Yet, they serve distinct functions. The Consultation Institute helps define these for us.
 - a. **What is consultation?** Consultation is the process of dynamic dialogue between individuals or groups, based on a genuine exchange of views and with the objective of influencing decisions, policies or programmes of action. It is best suited when **there is a decision to be made**.
 - b. **What is engagement?** Engagement can be defined as actions or processes taken or undertaken to establish effective relationships with individuals or groups so that more specific interactions can then take place. Engagement activity can be useful and insightful to help develop proposals before a formal consultation takes place. It is best suited for **fostering effective relationships**.
 - c. **What is involvement?** Involvement is the effective interaction between planners, decision makers and stakeholders to identify issues and exchange views on a continuous basis. It is best suited for when **there is an issue to discuss**.
12. Consultation is an important aspect of the council's work helping to shape priorities and deliver benefits to our communities. Given the wide-ranging areas of work the council engages in, it is essential that we listen to our customers and stakeholders and act on what they tell us to make improvements and be held accountable for decisions.
13. To make a decision about improving or changing a service, we need to be confident the decision is properly informed by public opinion and our key stakeholders. It is important that we think clearly and understand the reasons behind the following commonly asked questions: Why do we consult? When do we consult? When do we not consult? Our guidance will build on the following:

Why consult?	When to consult?	When not to consult?
To establish the priorities of communities and stakeholders.	When there is a statutory duty to consult with service users i.e. where the provision of a service is statutory or when considering making a significant change to that service.	Where room for manoeuvre is so limited, either by statutory or budgetary restrictions, that there is little real decision-making that the consultation can inform.
To co-design and develop solutions to problems.	When an inclusive dialogue is needed between individuals or groups to exchange views to influence a decision.	Where the council has already consulted on the same issue, or where we have recently approached the same groups of people/organisations with a sufficiently similar consultation exercise.
To monitor and measure satisfaction with services.		
To establish the strength of support for a proposed service, policy or course of action.		
To understand individual preferences where a range of options may be available.		Where the issue should or could be resolved without needing to consult.



14. Our standards and commitments will also be upheld against the following principles:

- a. **The Gunning principles:** The principles are a set of rules for public consultation that were proposed in 1985 by Stephen Sedley QC and accepted by the judge in the Gunning v London Borough of Brent court case about a consultation for a school closure. A supreme court case in 2014 endorsed the legal standing of the principles. Since then, they form a strong legal foundation from which the legitimacy of public consultations is assessed. They consist of four rules, which if followed, are designed to make consultation fair, legitimate and a worthwhile exercise:
 1. Consultation must be at a time when proposals are still at a formative stage. A final decision has not yet been made, or predetermined, by the decision makers.
 2. There is sufficient information provided, including the reasons for proposals, to allow for intelligent consideration and response. The information provided must relate to the consultation and must be available, accessible and easily interpretable for consultees to provide an informed response.
 3. There is adequate time for people to consider a proposal, participate and respond. The length of time given for consultee to respond can vary depending on the subject and extent of impact of the consultation.
 4. Conscientious consideration must be given to the consultation responses before a decision is made. Decision-makers should be able to provide evidence that they took consultation responses into account.
- b. **Equal access and inclusion:** Having clear communications and engagement plans to support activity, with an assessment of the best channels and methods to reach target audiences. Service leads will be responsible for equality impact assessments to support consultation proposals, which will inform the development of these plans, taking account of audiences with protected characteristics and those who may be digitally excluded. As a minimum standard, the council will consider housing printed copies of consultation surveys in libraries and other relevant public-facing buildings and will offer access to alternative formats – eg Braille, Easy Read.
- c. **Engagement methodologies:** Guided by the council's communications, marketing and engagement team, the council will start to explore wider tools and ways of gathering feedback from or involving residents in service delivery. This will be assessed as part of the development of communications and engagement plans to support activity, recognising that surveys may not be the only route, or the best

route to engage. This will form part of both a short-term and long-term commitment to provide a wide range of opportunities for people to engage with the council in a more inclusive way. Some activity may stand alone from formal consultations but could be a tool to then use for them.

- d. **Timeframes:** Supporting Gunning principle 3, best guidance examples of timeframes will be outlined in our refreshed guidance covering major service changes and statutory consultations to smaller non-statutory activities seeking views. Changes during the planning phase may cause delays to the consultation timeline, which may impact the outcomes that can be delivered. Consultation timelines should not be compressed to meet Cabinet dates and deadlines but designed around best practice and audience reach. It is also key to avoid audience consultation fatigue – timing and channel prioritisation are important considerations when planning.
- e. **Consultation feedback/results:** Providing feedback is key to having and maintaining an ongoing two-way conversation and engagement with residents. Feedback and results must inform decision-making and be published with a clear summary for the 'You said, we did' section of Let's Talk Oxfordshire.
- f. **Knowledge, understanding and relationships with communities:** Communities need to be segmented beyond geography to how they self-define (for example, families and their networks; commuters, visitors and communities of interest eg faith groups, recreational etc). This understanding needs to be recognised as constantly emerging and changing – the council will never have a fixed understanding, as communities are fluid.

Training and support

- 15. A staff training and support programme will be implemented to support the council's commitment to more active listening and engagement and the rollout of Let's Talk Oxfordshire. As part of this, the communications, marketing and engagement team will look to train staff within council service departments and create a network to promote best practice across the council. The remit of the network and their connection to the communications, marketing and engagement team would need to be clear and not just focused on online consultation processes and the support and use of Let's Talk Oxfordshire.
- 16. The communications, marketing and engagement team will provide quality co-ordination, oversight and an overarching communications and engagement approach. It will advise, guide, support and facilitate action, as well as deliver accompanying campaigns or publicity activity. The insights team will play an active role in providing behavioural insight utilising a data-based community intelligence tool, such as Acorn or Mosaic, so that consultations and community engagement projects can be more targeted and appropriate.

17. All these actions will help the council improve consistency of standards and approach towards consultation and engagement activity and facilitate two-way engagement.

Two-way conversations, expanding our reach and being inclusive

Oxfordshire Conversations

18. To support the new approach, in spring 2022 the council will introduce a series of engagement events that will offer opportunities for residents to hear from and ask questions of members of the Cabinet. Events will be themed but will include an element of an open question and answer session to allow for conversations on wider issues that matter most to residents.
19. There will be a commitment to trial these events in spring 2022, with a view to running an annual series of conversations both face to face (COVID permitting) and online – or hybrid, a mixture of both. This will offer people the greatest choice to access these conversations and enable those who are digitally excluded to participate. These events will be organised considering a geographical split to support local discussions, and how residents might self-define as part of a number of communities.
20. The events will be supported by senior officers and independently facilitated. Residents will be encouraged to register to attend, and pre and post event feedback surveys will be trialled to measure perceptions of how much the council listens and acts on residents' concerns.
21. These will not replace any ward or local member drop-ins or surgeries and will not be encouraged for residents to use to air individual/personal issues.
22. Attendance can be driven by a themed 'hot topic' and something that affects residents locally. The themed approach might also avoid confusion between district/city responsibilities and issues and the role of the county council. The role of our partners in these events, however, could be a future consideration depending on the theme of a conversation. It is expected that the online events may generate higher levels of engagement.
23. The council will use Let's Talk Oxfordshire to supplement the events and keep the discussions going online. The platform has various tools including discussion forums, ideas' boards, quick polls and surveys that could work well alongside the events.

New methodologies and tools

24. The council uses a range of community engagement tools, including surveys and discussion groups. The council will start to introduce, where appropriate, a wider set of tools that will facilitate a shift away from a 'transmit' approach to having a two-way dialogue. This may include using peer research, citizen

panels and appreciative inquiry. Existing community networks and volunteer groups can also be built upon, working with the council's district, city, health, education and business partners. A collaboration with a key partner, such as Healthwatch, could be considered.

- a. **Peer research** is where community members are recruited, trained and supported to carry out research and consultation within their own community networks. It is a collaborative approach, where organisations and local people work together for the common good. All parties achieve a better understanding of alternative perspectives and relationships are enhanced by working collectively.
- b. **Appreciative inquiry** is a methodology that systematically facilitates individuals and groups to define, agree and then build on what is good and effective within their structures. It involves facilitation through a four-step process, which is based on an assets-focused approach.
- c. **Deliberative panels** involve specially recruited members of the public (around 12 - 16 people), researchers and policy makers coming face to face to deliberate research, policy evidence and expert opinion over a three or four-day period. In relation to a specific policy issue of public importance, citizens are supported to pose questions to, and engage in debate with, policy makers and experts and then to reach a decision and/or set of recommendations.
- d. **Co-production** is where citizens are involved in the creation of public policies and services. The council has a number of existing co-production groups in children and adult services and can utilise them to jointly develop, design and contribute towards a service change or proposal (including this strategy).

25. Some of these new methodologies will help to ensure the council is offering a wide range of opportunities to engage residents, including those whose voices are not always harnessed and heard. Councillors also play a key part here in providing key intelligence for how local people and communities are viewed and how best to reach them.

26. Methodologies will be chosen depending on the type of engagement, consultation or involvement required (as outlined in paragraph 13) and level of participation desired based on an assessment of need. The use of more than one methodology is of course achievable and possible depending on the target audience(s). This will be outlined within supporting communications and engagement plans for engagement and consultation exercises.

27. The table below outlines the various participation levels, sphere of influence and examples of methodologies. To note some of the same methodologies can be used for different participation levels.

Level	Mode	Sphere of influence	Definition	Examples
Insight	One-way	None	Gathering data and published information to inform communication, engagement and consultation plans with no channel provided for feedback.	Census, JSNA, lifestyle data sets, published research etc.
Information	One-way	None	Transmitting information, with no channel provided for feedback.	Media release, website, newsletter, poster etc.
Engagement	Two-way	Limited	Inviting views and sharing experiences, with the objective of gaining insight to help develop ideas, proposals and programmes of action. It can also be used to build longer-term relationships to enable views to be exchanged on an ongoing basis.	Forums, network meetings, quick polls, workshops, events, participation and discussion groups etc.
Consultation	Two-way	Limited	Ask and listen to people to influence decisions, policies or programmes of action.	Polls and surveys, in-depth interviews, focus groups, online ideas boards, digital mapping tools, deliberative panels etc.
Collaboration and coproduction	Dialogue based	Moderate	Working together for a defined and common purpose such as identifying issues, delivering actions, and making decisions together	Peer research, co-design work, appreciative enquiry, recruitment, commissioning and evaluation panels etc.
Empowerment	Dialogue based	Full control	Organise events for citizens, place the full decision-making power in their hands and implement what they decide.	Citizen proposals, community-run committees

Building our online audiences

28. Work to review and map our existing networks and community groups and establishing a single GDPR-compliant stakeholder database has already begun by the communications, marketing and engagement team as part of its strategy to grow our online audiences. This includes segmenting audiences by areas of interests and being able to provide individuals with targeted and tailored e-newsletter content – news, information and consultation or engagement activities of interest. The Let's Talk Oxfordshire platform will offer another opportunity for audience growth, integrating with our newsletter platform.

Partnership working

29. We will build on existing partnerships and networks that are facilitated and supported by the council eg districts and city, health (and Healthwatch), business and academic institutes to expand our channel offer and our audience reach. Partner agencies, in particular health, also have integrated community engagement approaches (eg participation groups) and these could be harnessed to expand the council's audience reach and develop effective collaborations. We will also ensure we work closely with town and parish councils, as well as our councillor networks, to enhance hyper-local engagement, particularly with those harder to reach. This will make engagement more accessible for local people.

30. We will also ensure we continue to work closely with voluntary groups and partners. The Oxfordshire Compact (2004) includes a consultation and policy appraisal code that sets out ways in which statutory agencies and voluntary and community sector organisations should consult with one another in relation to:

- a. Effective consultation as a key part of the policy-making process.
- b. People's views shaping policies and setting the agenda for better services.
- c. Consultation as a two-way process in which all are equal partners, and both statutory and voluntary and community sector organisations have duties and responsibilities when consulting or being consulted with.
- d. Taking all reasonable steps to ensure that the processes and procedures are as inclusive as possible.

31. The council is currently coproducing a new voluntary and community sector strategy with the sector for agreement later in 2022. The aim of the strategy is to reiterate our commitment to the voluntary and community sector and to ensure we are appropriately aligned with each other. As part of the new strategy, it is our ambition to include a review the Oxfordshire Compact, which will be coproduced both internally and with the sector.

Listening to the voices of young people

32. Children and young people (aged 0 - 17) make up one in five of Oxfordshire's population. The council has been proactive for many years in ensuring the

voice, rights and responsibilities of children and young people are central to what the council does, using a variety of approaches to involve young people. Youth voice and youth participation is built into service delivery across children's services.

33. The current consultation and engagement opportunities for children and young people include: the Children in Care Council (CiCC); the Voice of Oxfordshire's Youth (VOXY) – a countywide forum that provides a voice for young people to make decisions about matters that affect change; interview, commissioning and evaluation panels; [oxme.info](#) – a website for young people, which provides work experience opportunities; and topic and service-specific consultations.
34. Following a review of VOXY (May 2021), the council will aim to widen the reach of young people engaged and increase the overall diversity of children and young people the council hears from. This includes developing insight so that we better understand our audiences, building stronger relationships with CiCC, service areas, school councils, partners and the voluntary sector so we can reach more children and young people, creating a virtual youth opportunities network on Let's Talk Oxfordshire, reintroducing topic-specific sounding boards and working with [oxme.info](#) and [activitiesoxfordshire.info](#) to target the promotion of youth voice opportunities and to cascade findings and actions.
35. Consideration will also be given to having a themed young people's Oxfordshire Conversation, working with a social media influencer to encourage participation.

Monitoring progress and review

36. Our success at engaging with and listening to residents and other partners in a more active and inclusive way will be measured through a range of metrics.
37. We will review the consultation and engagement strategy annually and publish an update against our key priorities and actions on the consultations – have your say pages of the county council website oxfordshire.gov.uk/consultation.
38. We will report on key performance measures in the communications, marketing and engagement team's quarterly monitoring reports and will provide opportunities for residents, communities, councillors, consultees, and engagement participants to give their feedback to improve our performance.
39. A summary of our actions for 2022 to 2023 is set out below. This has been extracted from a detailed action plan that has been developed, which focuses on building the right foundations, enabling two-way conversations, expanding our reach and being inclusive.

Building the right foundations

Priorities	Actions
Embed and develop the use of a new digital consultation and engagement platform 'Let's talk Oxfordshire' across the council	Develop protocols and best practice standards for Let's Talk Oxfordshire by the end of March 2022.
Refresh the council's best practice consultation and engagement guidance	<p>Establish new protocols and workflows for best practice consultation and engagement, upholding the council's commitment to the Gunning Principles, by the end of March 2022.</p> <p>Deliver a refreshed online consultation and engagement guidance document and toolkit and update any webpages by end of March 2022, including best practice advice on effectively including young people, the seldom heard and digitally excluded people.</p>
Maximise the value of council professionals to support effective consultation and engagement.	<p>Create a network of staff who have key responsibilities for consultation and engagement by the end of March 2022.</p> <p>Work collaboratively across communications, strategy and insight to support key service area led strategic consultations and engagement activities by providing specialist advice, data and behavioural insights, quality co-ordination and oversight, timely and effective campaign or publicity activity and effective data analysis and reporting, supporting a minimum of six exercises during 2022/23.</p>
Offer new training and support opportunities	<p>Develop and roll out new in-house training on best practice consultation and engagement, targeting the staff network initially and offering a minimum of four training sessions in 2022/23 and a lightning talk for all staff by the end of March 2022.</p> <p>Develop new in-house training for Let's Talk Oxfordshire, running a minimum of four sessions in 2022/23.</p>

Enabling two-way conversations

Priorities	Actions
Introduce new public engagement opportunities for people to hear from and ask questions of the council's Cabinet.	Trial Oxfordshire Conversations events in spring 2022, with a view to running an annual series of conversations both face to face (COVID permitting) and online – or hybrid, a mixture of both. Specific focus will be given to offering choice and supporting equality of access and inclusion.
Introduce a wider set of tools that will facilitate a shift away from a 'transmit' approach to consultation to having a two-way dialogue	Trial at least one of the new methodologies listed in the strategy in 2022/23 (eg appreciative enquiry, peer research etc), according to business need. Ensure at least 10 per cent of projects on Let's Talk Oxfordshire use at least one of the new engagement tools the platform offers by the end of 2022/23.
Widen the reach and overall diversity of young people we engage	Build even stronger relationships with our Children in Care Council, youth offer, service areas, school councils, partners and the voluntary sector to reach more children and young people from January 2022. Deliver three sounding board events during 2022/23 to provide deep dive opportunities for children and young people on themed issues identified by the council.
Support open and transparent decision-making	Introduce a new 'you said, we did' section to Let's Talk Oxfordshire by the end of March 2022.

Expanding our reach and being inclusive

Priorities	Actions
Build our online audiences	Work across the communications, marketing, and engagement team to sign-up 15,000 new users to Let's Talk Oxfordshire in 2022/23. Provide individuals with monthly GDPR-compliant targeted and tailored e-newsletter content – news, information and consultation or engagement activities of interest.
Focus on including everyone, by supporting equal access and inclusion in our	Starting with key service area led strategic consultations, have clear communications and engagement plans for exercises, which take

consultation and engagement practice	<p>account of insight and understanding about audience groups, including how communities self-define, those with protected characteristics and those who may be digitally excluded.</p> <p>Work with libraries and other public facing buildings to provide and promote engagement and consultation opportunities to digitally excluded from January 2022.</p> <p>Work with customer services to support customer requests for the provision of materials in alternative formats eg Braille, Easy Read, interpretation or translation services from January 2022.</p> <p>Use partnership networks even more effectively to make consultation engagement more accessible for target audiences, including seldom heard groups and digitally excluded, from January 2022.</p>
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Date	Action	Content	Status	Owner
1. Building the foundations				
A new digital consultation and engagement platform				
By January 2022	Embed best practice template in the Let's Talk platform to reinforce good practice	Create a standard project template in Let's Talk for all users to build upon that incorporates minimum standards	In progress	Engagement and consultation team
By March 2022	Develop protocols and best practice standards for Let's talk Oxfordshire	Develop and roll-out new protocols and best practice standards for Let's talk Oxfordshire including, use of plain English, proper use of images, alternative formats, privacy statement, data governance information, demographics, you said, we did etc.	In progress	Engagement and consultation team
By March 2022	Introduce a You said, we did section to Let's Talk Oxfordshire	Introduce a new 'You said, we did' section to Let's talk Oxfordshire where findings and outcomes are published ensuring all service areas populate this routinely - embedded into common practice by the end of year one.	To be started	Engagement and consultation team
July 2021 - end of 2022/23	Deliver a minimum of 400 engagement and consultation opportunities on the Let's Talk Oxfordshire platform	Support delivery of the forward plan to deliver target of 400 engagement and consultation opportunities on Let's Talk Oxfordshire	In progress	Engagement and consultation team
July 2021 - end of 2022/23	New registrations on Let's Talk Oxfordshire	Register 15,000 new users to Let's Talk Oxfordshire	In progress	Engagement and consultation team
July 2021 - end of 2022/23	Engagement with Let's Talk Oxfordshire	Ensure all projects supported by corporate team achieve 10% engagement (conversation rate calculated using project page views on Let's Talk Oxfordshire to actual participation in the consultation/engagement opportunity)	In progress	Engagement and consultation team
End of 2022/23	Expanding the use of digital engagement tools	Ensure at least 10 per cent of projects on Let's Talk Oxfordshire use at least one of the new engagement tools the platform offers in year one (maps, ideas board, forum, stories, guest book, questions, news feed, quick polls)	In progress	Engagement and consultation team
A refresh of the council's best practice consultation and engagement guidance				
By spring 2022	Develop council-wide annual engagement and consultation forward plan	1. As part of the council's annual planning process, identify key priorities that require consultation and engagement 2. Work with established Let's Talk Oxfordshire users and other past clients to develop a forward plan of activity, that will be predominantly service area led 3. Include six monthly item on DLTs and targeted content in Managers Briefing , to identify new activities that are not already on the forward plan 4. Use daily comms grid to capture key milestones for consultation and engagement activity 5. Use marketing and engagement service quarterly report to update progress on forward plan and progress against targets.	In progress	Head of communications, marketing and engagement Engagement and consultation team
By March 2022	Create a refreshed consultation and engagement guidance document and update any internal and external web content	Deliver a refreshed online consultation and engagement guidance document and update any webpages by end of March 2022, including best practice advice on effectively including young people, the seldom heard and digitally excluded people.	In progress	Engagement and consultation team

Page 28	By March 2022	New online consultation and engagement toolkit	1. Overhaul existing online engagement and consultation toolkit to include up to date best practice advice and guidance and information. Include new protocols and flowchart, support on using the Let's Talk, how to consult and engage young people, the seldom heard and digital excluded people 2. Widely promote toolkit, use it as the basis for training and Insite news headlines.	In progress	Engagement and consultation team
	By March 2022	Maximise the value of council professionals to support effective consultation and engagement	1. Create a network of staff across service areas with key responsibilities for engagement and consultation. 2. Work collaboratively across communications, strategy and insight to support key service area led strategic consultations and engagement activities by providing specialist advice, data and behavioural insights, quality co-ordination and oversight, timely and effective campaign or publicity activity and effective data analysis and reporting, supporting a minimum of six exercises during 2022/23.	In progress	Engagement and consultation team
	Early 2022	Establish project mandate and new workflow protocol for all consultation and engagement	1. Consistently roll-out project request form and complete corresponding project mandate for all consultation and engagement activities before any work is started 2. Develop and roll-out a new workflow protocol for all consultation and engagement activities as part of planning process 3. Ensure all consultation and engagement activities supported by corporate team have an accompanying communications and engagement plan, developed in partnership with other areas of the service.	In progress	Engagement and consultation team
	March 2022	Lightening talks and 10 minute takeovers	Pilot using Lightening Talks or 10 minute takeovers (eg in team meetings) to share best practice information about engagement, consultation and Let's Talk Oxfordshire.	Not yet started	Engagement and consultation
	Training and support				
	By March 2022	Build and roll-out in-engagement and consultation training offer	Develop an in-house training offer, based on best practice advice as set out in our toolkit. Target staff network initially, and to rollout to service areas that engage and consult regularly at a later point.	Not yet started	Engagement and consultation Team
	By March 2022	Let's Talk Oxfordshire - in-house training offer	Develop and deliver 4 x training sessions per year, with the first set of training delivered in March to coincide with rollout of new protocols and best practice standards for Let's Talk Oxfordshire.	Not yet started	Engagement and consultation Team
2. Two-way conversations, expanding our reach and being inclusive					
Oxfordshire Conversations					
	From spring 2022	Deliver three themed Oxfordshire Conversations that will offer opportunities for residents to hear from and ask questions of members of the Cabinet.	Set of three themed Oxfordshire conversation events (blend of multiple in-person and online engagement activities), including outreach activities to ensure the inclusion of seldom heard groups and those who are digitally excluded.	Not yet started	Engagement and consultation team
New methodologies and tools					

Jan - Dec 2022	Introduce a wider set of tools that will facilitate a shift away from a 'transmit' approach to consultation to having a two-way dialogue	Trial at least one of the new methodologies listed in the strategy in year one, according to business need Peer research Appreciative inquiry Specially recruited deliberate panel Co-production (outside of HESC)	Not yet started	Engagement and consultation team
By the end of 2022/23	Introduce a wider set of tools that will facilitate a shift away from a 'transmit' approach to consultation to having a two-way dialogue	Ensure at least 10 per cent of projects on Let's Talk Oxfordshire use at least one of the new engagement tools the platform offers by the end of 2022/23.	Not yet started	Engagement and consultation team
Building our online audiences				
From October 2021	Review and map our existing networks and community groups and establish a single GDPR-compliant stakeholder database	Use the registration function of Let's Talk Oxfordshire platform where appropriate, to support audience growth, integrating with our newsletter platform.	In progress	Marketing and campaigns team
From January 2022	Establish a digital newsletter highlighting consultation and engagement opportunities	Working with the marketing and campaigns team to produce a regular e-newsletter to go out to registered users of Let's Talk and those who expressed an interest in consultation opportunities via other GDPR compliant channels.	In progress	Marketing and campaigns manager and engagement and consultation team
Partnership working and inclusivity				
From January 2022	To use partnership networks, including the voluntary sector, even more effectively to make engagement more accessible for target audiences, including seldom heard groups and digitally excluded.	For each consultation and engagement activity supported by the corporate team, we will build on existing partnerships and networks to expand our channel offer and our audience reach and develop effective collaborations	In progress	Engagement and consultation team
From January 2022	Work closely with town and parish councils, as well as our councillor networks, to enhance hyper-local engagement, particularly with those harder to reach.	For consultation and engagement activities affecting areas at a town or parish level, we will ensure they are notified and information shared in advance as appropriate, so that they are able to engage with local communities and share insight. This will make engagement more accessible for local people.	In progress	Engagement and consultation team
From January 2022	Supporting equal access and inclusion in our consultation and engagement practice through effective planning.	Starting with key service area led strategic consultations, have clear communications and engagement plans for exercises, which take account of insight and understanding about audience groups, including how communities self-define, those with protected characteristics and those who may be digitally excluded.	In progress	Engagement and consultation team
From January 2022	Work with customer services to support customer requests for the provision of materials in alternative formats	Braille, Easy Read, interpretation or translation services .	In progress	Engagement and consultation team
From January 2022	Work with libraries to provide and promote engagement and consultation opportunities to digitally excluded	Provide posters, hard copy materials and instructions for library staff to help promote key consultations supported by corporate team and strategic programmes team.	In progress	Engagement and consultation team
December 2022	Review Oxfordshire Compact consultation and policy code.	Review and agree the code as part of coproducing a new voluntary and community sector strategy.	In progress	Head of strategy and engagement and consultation team
Listening to the voices of young people				
From spring 2022	Deliver three sounding board events to provide deep dive opportunities for children and young people on themed issues identified by the council.	Full or half-day sounding board events (in-person or online depending on COVID restrictions), including outreach activities to ensure the inclusion of seldom heard groups and those who are digitally excluded	Not yet started	Engagement and consultation team

From January 2022	Widen the reach of young people engaged and increase the overall diversity of children and young people involved in Voice of Oxfordshire's Youth (VOXY).	<ol style="list-style-type: none"> 1. Work across CSI to develop a bitesize profile of children and young people in Oxfordshire to better understand our audience and engagement preferences. 2. Build even stronger relationships with CiCC, youth offer, service areas, school councils, partners and the voluntary sector to reach more children and young people. 	Not yet started	Data insight team Engagement and consultation team
From Spring 2021	Creating a virtual youth opportunities network on Let's Talk Oxfordshire	<ol style="list-style-type: none"> 1. Create a VOXY hub on Let's Talk Oxfordshire, including links across to Oxme.info and activitiesoxfordshire.info 2. Pilot use of VOXY hub to tailor high profile consultations with specific content aimed at young people - start with SEND consultation 3. Utilising Let's Talk Oxfordshire digital engagement tools to capture feedback to support Sounding Boards 	Not yet started	Engagement and consultation team

Divisions Affected - All

PERFORMANCE AND CORPORATE SERVICES OVERVIEW AND SCRUTINY COMMITTEE

17 JANUARY 2022

BUDGET SCRUTINY REPORT

Report by Corporate Director Commercial Development, Assets, and Investment

RECOMMENDATION

1. **The Committee is RECOMMENDED to**
 - (a) Consider the DRAFT Budget Scrutiny Report for submission to Council attached at Appendix A
 - (b) Agree a Budget Scrutiny Report for submission to Council at its budget setting meeting

Executive Summary

2. The purpose of this report is to provide the Performance & Corporate Services Overview and Scrutiny Committee with its DRAFT Budget Scrutiny Report following the consideration of the Cabinet Budget Proposals on the 10 December 2021.
3. The Committee is asked to consider the report and agree a version for submission to Full Council for consideration on 8 February 2022 when it considers the budget.
4. The DRAFT Budget Scrutiny Report attached at Appendix A will be submitted to Cabinet to inform their budget considerations on the 18 January 2022 with any agreed amendments or additions reported verbally to the Cabinet meeting itself.

Budget Scrutiny Report

5. The Committee met on the 10 December 2021 to consider and comment on:
 - The Oxfordshire Fair Deal Alliance's priorities
 - The engagement feedback on the Oxfordshire Fair Deal Alliance's priorities

- The revenue savings, pressures and investment proposals for 2022/23 to 2025/26 and

6. The Committee considered a report that set out budget proposals for the period 2022/23 to 2025/26, which are included in the 2022/23 budget consultation, allowing the Committee to comment on these, alongside the financial context, and on the Oxfordshire Fair Deal Alliance's priorities in which these proposals are made.
7. Alongside the report the Committee also considered the following annexes:
 - Annex 1a – The Oxfordshire Fair Deal Alliance's priorities.
 - Annex 1b – Engagement feedback on the Oxfordshire Fair Deal Alliance's priorities
 - Annex 2a – Existing Planned Budget Pressures and Savings
 - Annex 2b – New Proposals for Investments, Pressures and Savings
 - Annex 2c – COVID-19 Pressures
 - Annex 3a – Overarching Equality Impact Assessment
8. The Leader of Council, the Cabinet Member for Finance and other Cabinet Members, supported by Council Officers, presented the budget to the Committee on 10 December 2021 and responded to questions from the Committee regarding its content.
9. The DRAFT Budget Scrutiny Report was drafted following the meeting of 10 December 2021 in consultation with the Chair and Vice-Chair of the Committee. It was sent out to all Committee members for comment prior to inclusion in the agenda pack, no comments on its content were received.

Supporting the Budget Setting Process

10. The Budget Scrutiny report, setting out key observations and recommendations, is intended to assist the budget setting process. The process seeks to hold the Cabinet to account for its budget proposal and how they will deliver its priorities, the content of the report is put forward with the intention of adding to the budget setting debate at Cabinet and subsequently at Full Council.
11. The Local Government Act 2000 states that it is the responsibility of the Full Council, on the recommendation of the executive, to approve the budget and related council tax demand. The Act makes it clear that the role of scrutiny in the financial process is to hold the executive to account and to ensure that its decisions are in the best interests of the community. Some scrutiny of budget setting and other financial planning processes is therefore essential.
12. This report is the outcome of the current budget scrutiny process within the Council. It is submitted to Cabinet to help inform their debate and then Full Council to inform the setting of the budget.
13. The Performance and Corporate Services Overview ad Scrutiny Committee will be considering how best to deliver the budget scrutiny function moving forward as part of the Council's programme to improve the Overview and Scrutiny function.

Financial Implications

This report does not raise any direct financial implications. Changes made in response to feedback from Performance & Corporate Services Overview and Scrutiny Committee will be incorporated into the proposed budget to council on 8 February 2022.

Lorna Baxter
Director of Finance

Legal Implications

This report does not raise any legal implications.

Anita Bradley
Director of Law and Governance

Report by

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Annex: Appendix A – DRAFT Budget Scrutiny Report

Background papers: Report to Council 13 July 2021 – Review of Scrutiny Arrangements

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BUDGET SCRUTINY OBSERVATIONS AND RECOMMENDATIONS

PERFORMANCE AND CORPORATE SERVICES OVERVIEW & SCRUTINY COMMITTEE

OXFORDSHIRE COUNTY COUNCIL OVERVIEW & SCRUTINY

This report provides key observations and recommendations to the Cabinet and Council regarding its budget proposals. The Performance and Corporate Services Overview and Scrutiny Committee considered the Cabinet's budget proposals, the consultation exercise to date and provided feedback on comment on the Oxfordshire Fair Deal Alliance's priorities and how the budget proposals for 2022/23 –2025/26 align with those priorities.

The key observations and recommendations within this report represent those agreed at the Performance and Corporate Services Overview and Scrutiny Committee meeting on 10 December 2021. They are made on the understanding that they will be included in the Budget and Business Planning report to Cabinet on 18 January 2022, along with the outcome of the public consultation. They will be taken into consideration by Cabinet in setting out their proposed revenue budget for 2022/23 and Medium Term Financial Strategy (MTFS) to 2025/26.

In determining the final budget proposals that will be included in the proposed budget for 2022/23 Cabinet will also consider the outcome of the Provisional Local Government Finance Settlement and other resources available through Council Tax and Business Rates. Cabinet will provide a formal response to this report.

Budget Scrutiny

Oxfordshire County Council is currently developing a new approach to delivering Overview and Scrutiny in the County, this new approach requires the development of process and procedure as well as culture, expectations and ability to deliver effective and value adding Overview and Scrutiny.

Overview and Scrutiny is seeking to become more focused on critical matters where it can make a real difference and add the most value. This new approach will take time to develop and embed, it requires the creation of a strong organisational culture that supports scrutiny work that can add real value by, for example, improving policy-making and the efficient delivery of public services.

This development and improvement is required no more so than in the Council's approach to Budget Scrutiny. This report reflects our ability as an organisation as it currently stands to undertake effective budget scrutiny, noting the intention to change this approach in future years which will be highlighted in more detail towards the end of this report.

This is not a lengthy or detailed report, it recognises that there is a better and more effective way to undertake budget scrutiny but seeks to provide useful observations to help inform the Cabinet consideration of the budget proposals.

Methodology

The Budget Scrutiny process has followed the process of previous years of undertaking the budget scrutiny function at the December Performance & Corporate Services OSC meeting.

This year the Committee had agreed to include development of the Corporate Plan and Budget Scrutiny in the work programme for the December meeting, following advice from the Council's External Governance Advisor and Centre for Governance and Scrutiny this was amended to refocus the budget scrutiny item onto the ability of the budget proposals to deliver the Council priorities.

The new Administrations Corporate Plan is currently in development and scrutiny will play a key role in holding it to account and seeking to assist in policy development to support it once it is in play, it is anticipated that the new Corporate Plan will emerge following this budget round.

The approach the Committee agreed to take was **to review whether resources were being appropriately allocated to ensure delivery of the Council priorities**, and not to review the budget proposal line by line. This approach is in line with best practice guidance from the Centre for Governance & Scrutiny. As a result the Committee prepared itself for the December meeting through:

- Budget Scrutiny training session with Centre for Governance and Scrutiny
- All Councillor session on budget proposals
- Committee session on development of budget and consultation
- Agenda planning meetings to scope out report requirements and approach to meeting

Following agenda planning discussions with key officers the additional spend within the budget proposal was requested to be presented under each of the Council's 9 priority areas, the intention was to focus the approach at reviewing the allocation of resources to deliver these key priorities.

The Committee's view is that the approach it set out to take was not delivered on this occasion, the intention of course is through continued improvement within Scrutiny itself and budget setting processes within the Council that this approach will be deliverable in future years.

The Committee were provided with the following papers to consider and comment on:

- Budget proposals for the period 2022/23 to 2025/26
- The Oxfordshire Fair Deal Alliance's priorities.
- Engagement feedback on the Oxfordshire Fair Deal Alliance's priorities
- Existing Planned Budget Pressures and Savings
- New Proposals for Investments, Pressures and Savings
- COVID-19 Pressures
- Overarching Equality Impact Assessment

The desired outcome from this year's budget scrutiny exercise is to provide observations and key messages back to Cabinet for consideration when determining the budget at their January 2022 Cabinet meeting.

Key Messages and Observations

Council Priorities – Developing the Corporate Plan

The new Administrations Corporate Plan is currently in development, this will follow the current budget setting cycle. Throughout October and November 2021, the council has undertaken public and stakeholder engagement to inform the development of the new strategic plan and the budget-setting process. The budget consultation provides an opportunity for all residents, businesses and other people to comment and engage on the budget proposals as well as the Oxfordshire Fair Deal Alliance's priorities. This feedback will be used to inform the final budget proposals and develop a draft strategic plan.

As the new Administrations Corporate Plan is developed the Committee has focused on the Oxfordshire Fair Deal Alliance's identified nine priorities in order to determine if the budget proposals are appropriately allocated to resource delivery of those priorities.

Recommendation 1: The Council Priorities need to be more clearly defined

It has been difficult to examine if appropriate resources have been allocated to each priority area as each priority area has not been clearly defined. The Oxfordshire Fair Deal Alliance's Priority document provides an overview of priority commitments and the budget proposal does not break down expenditure or even additional expenditure into these priority areas.

Moving forward the priority areas will need to be clearly defined in the Corporate Plan with details of supporting KPIs and deliverables intended to contribute towards the achievement of each priority area.

It is noted that the Council is in the process to develop and deliver a Corporate Plan, and has an intention to deliver details of deliverables and KPIs for each priority area which is welcomed. Cabinet is recommended to ensure that the Corporate Plan clearly sets out the council's strategic vision, objectives and priorities and to ensure that these priorities are translated into operational action plans.

The Corporate Plan (supported by service plans and appropriate strategy and policy) must identify what needs to happen in all service areas to achieve success, what resources will be required for delivery, the outputs and outcomes that are anticipated and any other contributory factors (e.g. actions by partner organisations, risks, resource assumptions etc).

The Council will then be in a position to underpin this through individual service plans for each defined area of council business which provide greater detail and specify a range of performance targets for those delivering services or improvements.

The Cabinet should also consider how they present the priority areas, at present the priorities are listed 1 to 9 which gives the impression that there is an order of importance attached to the priority areas. Through questioning we understand that this is not the case and so should be reflected as so in the subsequent Corporate Plan.

Budget suitability: New Investment

A key role for the budget scrutiny process is to ensure there is alignment between priority areas and resource allocation in the short, medium and longer term. The details of Covid-19 pressures impacting the budget is helpful and the impact and pressures brought by the pandemic to the budget are recognised.

It is not clear from the budget proposal how each Directorate base budget allocation will enable the Council to achieve its objectives, similarly it is not clear what each new investment allocation will deliver. The budget proposal sets out the following levels of new investment *(as set out in questioning at the Performance & Corporate Services OSC meeting on 10 December 2021)*:

PRIORITY	NEW INVESTMENT
Carers & Social Care	£1.94M
Health & Wellbeing	£1.47M
Climate Change	£690K
Local Business	£680K
Inequalities	£650K
Children & Young People	£517K
Local Democracy	£490K
Integrated Transport	£130K
Access to Nature	£25k

The budget proposal does not set out details of how the new investment will contribute towards delivery of each priority with details of annual deliverables and targets.

Recommendation 2: Details of how new investment will contribute towards delivery of each priority is required to enable the public and Councillors to understand what the Council is seeking to achieve. Cabinet is recommended to ensure future budget proposals clearly set out the deliverables, targets and measures of success to be achieved through new investment. One way to do this might be to indicate how investment will affect KPIs and whether new ones will be developed.

The levels of proposed new investment do not appear to align with the results of the public consultation exercise to date, for example:



- Public discussion places Children & Young People as number 1 priority yet level of new investment being proposed is 6th
- Not clear how new investment will address key public concerns of traffic congestion and improving roads and pavements
- Young people identified integrated transport and access to nature as top 2 priorities yet these areas see the lowest levels of additional investment

The Committee accepts at the time of undertaking budget scrutiny the consultation exercise was not yet complete, however if the Council is going to undertake public consultation of this nature then it should allow the results of that consultation to be able to clearly impact budget proposals.

Recommendation 3: Cabinet sets out the impact of the public consultation exercise on its budget proposals at its January Cabinet meeting.

The details around the existing Medium Term Financial Strategy (MTFS) provided to the Committee, alongside the Cabinet Member for Finance overview provided at the Committee meeting is welcomed. The details on the updated MTFS and proposed Council Tax increase and the information provided in the Committee papers do not in the Committees opinion make it clear what the public will get as a result of the proposed Council Tax increase.

Recommendation 4: Future budget proposals should clearly set out in a publicly understandable way a clear rationale for increases in council tax and if possible what deliverables will result from the rise.

At the Performance and Corporate Services Overview & Scrutiny Committee meeting on 10 December significant reference was made to the Council bidding for funding and how that funding would contribute to the delivery of services. What is not completely clear is what is the consequence of the bidding for funding not being successful and the implications on the priorities would be.

The Climate Challenge

The Cabinet has made clear that tackling the climate challenge is a key priority and this will be a topic that will be reviewed in more detail by the Place Overview and Scrutiny Committee in 2022. The budget proposal does not make clear how this budget proposal will contribute towards putting action to address the climate emergency at the heart of the Councils work. Given that addressing the climate emergency covers all areas of the Councils operations it would be fair to have expected that more profile would have been given to how the Council will seek to realign the budget towards achieving this priority.

The budget sets out additional investment of £690k into climate change specifically, it also highlights investments around increase capacity to support zero carbon infrastructure, preparation for Environmental Bill, development of pathways to zero carbon Oxfordshire, increasing capacity to deliver EV policy and

others all of which are welcomed. However there is very little detail of deliverables that will help address the climate emergency, yet alone key changes in strategy and policy across the Council that would place tackling the climate emergency at the heart of the Council's work.

Cabinet could consider making tackling climate change a key principle that underlines policy design across the Council moving forward and a key principle for future budget proposals that would require a need for policy and budget proposals to demonstrate proactive consideration of climate priorities in their design.

Recommendation 5: Cabinet ensures the Corporate Plan provides greater clarity around its environmental ambitions at a strategic and action/ measurable level, setting out fundamental investments and changes to the Council's approach that will impact tackling the climate emergency in future years. Additionally Cabinet considers mainstreaming its approach to Climate Change so it becomes a consideration in all policy and budget proposals.

This budget proposal does not identify how the budget will place tackling the climate emergency at the heart of how the Council operates, the Cabinet could consider making this clear when it considers the budget proposals. Cabinet should also consider how this priority should impact some key policy areas of the Council that are to be developed and debated in the coming year, such as:

- Property Strategy** – how far should the strategy be influenced by reducing the Council's carbon footprint? What level of investment is required to make council property more climate friendly? What are the climate goals for this Council when determining its Property Strategy? How is the Council ensuring its buildings are energy efficient low carbon buildings? How to ensure the Council estate maximises environmental benefits?
- Street Design Guide** – what impact will tackling the climate emergency have on the next iteration of the guide?
- Transport** – what tools does the Council have to enable and encourage the use of low carbon transport? What investment is required to make Council transport low carbon such as home to school transportation?

The Environment and Place budget sets out significant savings but also sets out a limited programme of reinvestment, given that the priority to place tackling the climate emergency at the heart of what the Council does Cabinet could consider whether additional reinvestment should be a priority within the budget.

Adult Services Challenges

The Committee notes the significant challenges facing Adult Services and within Adult Social Care and the implications for the budget. The pressures highlighted within the budget proposal and at the Committee meeting of the 10 December are a significant challenge to the Council. Given the impact of budgetary pressures there is concern that Adult Social Care may not be



getting the level of resource required from this budget proposal, however the Committee recognises the complexity of this issue.

The budget papers did not provide a detailed examination of the budgetary pressures Adult Services are under now and in the future, the Committee feels that these pressures and challenges should be a key focus for the 2022/23 budget scrutiny process.

Recommendation 6: A joint Working Group be set up between the People OSC and the Performance & Corporate Services OSC to undertake a review of the pressures and challenges facing Adult Services in order to identify options and make recommendations to be fed into the 2022/23 budget setting process to assist Cabinet in dealing with the significant challenges Adult Services faces.

Children Services Challenges

The challenges within Children Services are equally significant as those in Adult Services, the budget proposal does not provide the reassurance that these challenges will be able to be met in future years.

The Committee considered whether a working group should also be set up to examine the pressures faced by Children Services and seek to develop options to inform the budget setting process for future years. Given the weight of change within Children Services and the significant pressures that need to be addressed in key areas the Committee agreed that it would seek Cabinets view on how the Scrutiny function can best support the Council on this issue moving forward. **Cabinet is asked to advise the Committee with its views.**

Cabinet is asked to consider the future funding model for the Family Solution Plus programme. The recent review of this programme by the People OSC revealed its potential to deliver significant results, notably significantly reducing the number of children who become subject to child protection plans and the number who enter care. The testimony of partners as well as the Oxford University Professors who undertook an independent assessment of the programme significantly supported additional investment in the programme that could produce savings overall through its interventions over time.

The Committee is concerned that due to budgetary pressures experienced by partner organisations that the Family Solution Plus programme may not get the required level of investment to drive the programme forward towards financial sustainability and addressing future cost pressures across the wider system.

Recommendation 7: Cabinet commits to providing the required future funding to allow the Family Solution Plus programme to achieve its priorities including expansion of the programme.

Additional Observations

The Committee would also wish to highlight the following observations in relation to the budget proposal and its ability to deliver the Councils priorities:

- ❑ There is an opportunity to invest to save in tackling health inequalities but providing additional funding to focus on Tier 1 tertiary prevention. A detailed action plan of how this could be delivered across all Council Departments would help shift Council focus into supporting health partners more effectively
- ❑ Cabinet could consider mainstreaming Inequality considerations so that Inequality ambitions become a consideration in all policy and budget proposals which may help in meeting duties under Part One of the Equality Act 2010
- ❑ The path for cultural services and libraries is not clear from the budget proposals
- ❑ Proportion of savings to reinvestment is a concern that requires significant focus in future budget scrutiny process
- ❑ The Council has indicated a commitment to enhancing the Overview and Scrutiny function and playing its part in creating a vibrant local democracy, there are no details of the budgetary support moving forward for the Scrutiny function in the budget proposal. Cabinet should consider what resources are required to deliver the best practice scrutiny function is aspires to and what measures need resourcing to create a vibrant local democracy.
- ❑ There are some concerns within the Committee about the Councils current approach to budget consultation and consultation in general. The Committee recognises that this is an item for consideration at its January 2022 meeting and would welcome a role in ensuring future budget consultation can add as much value as possible to the budget setting process
- ❑ Workforce issues and the retention and recruitment of workforce is recognised as a key concern for the Council and for significant public sector and business partners. Cabinet could consider the potential benefits of a County wide workforce commission to identify options moving forward.
- ❑ A clearer idea of how the revenue budget will support delivery of capital programme would be beneficial, both in a presentational and substantive sense. i.e. some indication of which elements support the capital programme and whether this is adequate given the large pipeline of projects and the constant pumping out of new active travel funds by central government

As previously stated this report has been developed to provide observations and recommendations to support Cabinet budget considerations in January. It is not a lengthy or detailed report, it recognises that there is a better and more effective way to undertake budget scrutiny and seeks Cabinets support in developing the ongoing improvements across the Overview and Scrutiny function moving forward.

The support provided by the Cabinet to Overview and Scrutiny in 2021/22 should be recognised.

Next Steps

The schedule of meetings makes providing Cabinet with this report difficult, with the Performance and Corporate Services OSC next meeting on 17 January 2022 and Cabinet meeting a day later on 18 January 2022 to consider budget proposals.

This report will be shared with Cabinet in draft form at the earliest opportunity with any amendments or additions following the Committee meeting on 17 January being verbally reported to Cabinet the following day.

In addition, the Capital and Investment Strategy, incorporating the Property Investment Strategy and Treasury Management Strategy alongside the Capital Programme proposals, will be considered by this Committee at its January 17 2022 meeting. Any observations and recommendations from that meeting will also be reported to Cabinet verbally at its meeting on January 18 2022.