

# **Invitation to Submit an Expression of Interest to run a new primary school**

**Comeytrowe, Taunton**

## **Background Information & Specification**



**Proposed view of the new school provided by the Architects, prior to  
submission of formal planning application**

**June 2021**

## Introduction

Under section 6A of the Education and Inspections Act 2006 (the 'free school presumption') where a Local Authority identifies the need to establish a new school it must, in the first instance, seek proposals to establish an academy. Somerset County Council has identified the need to establish a new primary school to include early years provision in Taunton to open in September 2023.

Somerset County Council has a statutory duty to plan the provision of school places, to ensure that there are sufficient places in the area, promote high educational standards and ensure fair access to educational opportunity and promote the fulfilment of every child's educational potential. The Council has an approved School Place Planning Infrastructure Growth Plan 2019 available at the Somerset County Council website.

[www.somerset.gov.uk/EducationIGP](http://www.somerset.gov.uk/EducationIGP)

## Profile of the Area - Pupil characteristics

|  |                     |                   |                |
|--|---------------------|-------------------|----------------|
| <b>Number of local primary schools</b><br><br>Bishop Henderson CofE VA Primary School, Bishop Hull Primary School, Parkfield Primary School and Trull CofE VA Primary School | <b>4</b>            |                   |                |
| <b>Number of infant schools</b>  | <b>0</b>            |                   |                |
| <b>Number of junior Schools</b>  | <b>0</b>            |                   |                |
| <b>Total number of primary pupils (2020 October Census)</b>  | <b>1333 on roll</b> |                   |                |
| <b>Number of secondary schools in catchment</b>  | <b>1</b>            |                   |                |
| <b>Total number of secondary pupils (2020 October Census)</b>  | <b>1196 on roll</b> |                   |                |
| <b>Pupil characteristics Profile *</b>   | <b>Somerset</b>     | <b>South West</b> | <b>England</b> |

|   |               |               |               |
|---|---------------|---------------|---------------|
| <b>Primary pupils eligible for and claiming free school meals</b> | <b>15.90%</b> | <b>15.10%</b> | <b>17.70%</b> |
| <b>Pupils who have statement/EHCP of SEN (Primary)</b>            | <b>1.20%</b>  | <b>2.00%</b>  | <b>1.80%</b>  |
| <b>SEN pupils without statement/EHCP (Primary)</b>                | <b>12.60%</b> | <b>13.60%</b> | <b>12.80%</b> |
| <b>Pupils from Minority Ethnic Groups</b>                         | <b>12.5%</b>  | <b>16.9%</b>  | <b>34.6%</b>  |
| <b>KS2 Outcomes RWM ≥Exp</b>                                      | <b>61%</b>    | <b>64%</b>    | <b>65%</b>    |

\* Source: The Local authority interactive tool and DfE 'Schools, pupils and their characteristics' 2019/20

There are insufficient existing school places in the area, and none of the schools (Bishop Henderson CofE VA Primary School, Bishop Hull Primary School, Parkfield Primary School and Trull CofE VA Primary School) can be expanded sufficiently to meet the demand.

The authority is therefore seeking proposals from appropriate sponsors to open this new school. This school would be deemed a free school. Proposers should complete the Free School Presumption application form and return it to Elizabeth Smith at Somerset County Council.

### **Indicative timelines for the project**

|                        |  |
|------------------------|--|
| Complete               | Identification of need for the school  |
| Approved 8 August 2019 | <p>Application no 42/14/0069</p> <p>Outline planning application with all matters reserved (except points of access) for a residential and mixed use urban extension at Comeytrowe/Trull to include up to 2000 dwellings, up to 5.25 hectares of employment land, 2.2 hectares of land for a primary school, a mixed use local centre, and a 300 space 'park and bus' facility on land at Comeytrowe/Trull</p> |

|                        |   |
|------------------------|---|
| Approved 18 March 2020 | <p>Ref. 42/19/0053</p> <p>Application for approval of reserved matters following outline application 42/14/0069 for construction of the strategic infrastructure associated with the Western Neighbourhood, including the spine road and infrastructure roads; green infrastructure and ecological mitigation; strategic drainage, earth re-modelling works and associated retaining walls on land at Comeytrowe/Trull. Approved 18 March 2020.</p>   |
| Approved 22 July 2020  | <p>42/20/0006</p> <p>Application for approval of reserved matters following Outline Application 42/14/0069 for the appearance, landscape, layout and scale for the erection of 70 No. dwellings, hard and soft landscaping, car parking including garages, internal access roads, footpaths and circulation areas, public open space and drainage with associated infrastructure and engineering works (Phase 1a Parcel H1b) on land at Comeytrowe/Trull.</p>   |
| Approved 8 April 2021  | <p>42/20/0031</p> <p>Application for approval of reserved matters in respect of appearance, landscape, layout and scale, following outline application 42/14/0069, for Phase H1A for the erection of 76 No. dwellings, hard and soft landscaping, car parking including garages, internal access roads, footpaths and circulation areas, public open space and drainage with associated infrastructure and engineering works with additional details as required by Condition No's 7, 9, 11, 12, 13, 14, 15, 16, 18, 19, 20, 21 and 23 on land at Comeytrowe/Trull.</p> |

|  |   |
|--|---|
| Approved 8 April 2021                              | <p>42/20/0056</p> <p>Approval of reserved matters in respect of the appearance, landscape, layout and scale, pursuant to planning permission reference (42/14/0069) for the erection of 64 dwellings, hard and soft landscaping, car parking including garages, internal access roads, footpaths and circulation areas, public open space and drainage with associated infrastructure and engineering works, together with additional details as required by conditions 7, 9, 11, 12, 13,14, 15, 16, 18, 19, 20, 21 and 23 at Phase H1C on land at Comeytrowe/Trull</p>           |
| A decision has yet to be made on this application. | <p>42/21/0004</p> <p>Application for approval of reserved matters following outline application 42/14/0069 in respect of the appearance, landscape, layout and scale for the erection of 166 No. dwellings, hard and soft landscaping, car parking including garages, internal access roads, footpaths and circulation areas, public open space and drainage with associated infrastructure and engineering works together with additional details as required by Condition No's. 7, 9, 11, 12, 13, 14, 15, 16, 18, 19, 20, 21 and 23 on land at Parcel H1d, Comeytrowe/Trull</p> |
| 10 06 2021   | Sponsor Expressions of Interest Published   |
| 03 08 2021   | Closing Date for Receipt of Applications 5.00pm on Wednesday 3 <sup>rd</sup> August 2021  |
| 03 08 21 to 30 09 2021                             | Somerset County Council will assess proposals against specification and assess bids. Proposers may be invited to present their bids - provisional dates 14 <sup>th</sup> September 2021 and 28 <sup>th</sup> September 2021   |
| 14 09 2021<br><br>28 09 2021                       | Provisional dates for the presentation day  |

|                  |   |
|------------------|---|
| Autumn 2021      | Detailed Planning Application for the new primary school submitted to Somerset County Council |
| 29 10 2021       | LA Recommendation for the Regional Schools Commissioner and Secretary of State                |
| 2022/23          | Proposer to undertake Section 10 Consultation   |
| 2022/23          | Proposer to start set up process  |
| 1 September 2023 | Proposed school opening date  |

The Regional School Commissioner (RSC) for the South West on behalf of the Secretary of State, will consider the local authority assessments and recommendations before deciding which proposer is in the best position to take forward the new school. The RSC will inform the local authority and the successful proposer of its decision, and the local authority will inform any unsuccessful proposers.

If you would like further information or wish to discuss your application, please contact Elizabeth Smith via email [ecsmith@somerset.gov.uk](mailto:ecsmith@somerset.gov.uk). in the first instant to agree a mutually convenient time for a phone conversation.

Your completed application form should be sent electronically no later than 5.00pm on 3<sup>rd</sup> August 2021 via the Supplying the South West Portal. Two copies should also be delivered to County Hall, Taunton, Somerset, TA1 4DY by the same date.

As per the DfE guidance on the commissioning of new Free Schools, the process will be managed by the LA, in consultation with the DfE Free Schools Team. Following a shortlisting and bid assessment process, the LA will provide a report to the DfE with the recommended sponsor(s) and the reasons for the recommendation. The recommendation will then be referred to the Regional Schools Commissioner (Head Teachers Board).

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

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

## Section A – APPLICANT GROUPS

Proposers **must be** DfE approved sponsors. If you are not already an approved sponsor you will need to separately apply via the formal sponsor approval process.

You should contact the DfE about becoming a sponsor before submitting a proposal and you can find out more information at <https://www.gov.uk/guidance/sponsor-an-academy>

## Section B - THE SCHOOL

### 1. Site/Location

This proposal is in relation to a new primary school at Comeytrowe/Trull, Taunton, Somerset.

The site is located south west of Taunton on land at Comeytrowe/Trull within The Orchard Grove housing development (see Appendix 1). Further details can be found on the Orchard Grove website ([orchard-grove.com](http://orchard-grove.com))

### 1. Background and Reasons why new school being considered

Somerset County Council has identified a need to open a new 420 place primary school with nursery provision which will meet the need for primary places from the Orchard Grove housing development which will eventually see 2000 new homes built in the south west of Taunton by 2028.

### 2. Background information on schools in the area

An overview of school provision in Taunton is contained within the School Place Planning Infrastructure Growth Plan 2019 on the Somerset County Council website: [www.somerset.gov.uk/EducationIGP](http://www.somerset.gov.uk/EducationIGP)

Here you can find a summary of the current primary and secondary provision in the area, growth through housing developments and a map showing the primary and secondary schools.

The 2021 Education IGP will be published later this summer. However a link to the most recent pupil forecasts is provided below:

[www.somerset.gov.uk/schoolpopulation2020](http://www.somerset.gov.uk/schoolpopulation2020)

It is anticipated that the new school will service the needs of the new housing development at Comeytrove/Trull (Orchard Grove).

The Somerset West and Taunton Strategic House Land Availability Assessment has been recently published and can be found with the following link :-

<https://www.somersetwestandtaunton.gov.uk/media/2721/swt-shlaa-2021-appendices-a-to-d.pdf>

The neighbouring schools of the Comeytrove development are Bishop Henderson, Bishop Hull, Parkfield and Trull. The schools are at, or close to net capacity (N/C):

Bishop Henderson N/C 420 NOR 431 (Oct 2020 census)

Bishops Hull N/C 237 NOR 225 (Oct 2020 census)

Parkfield N/C 420 NOR 420 (Oct 2020 census)

Trull N/C 270 NOR 257 (Oct 2020 census)

Although the 2020 school population forecasts (published June 2021) indicate that the NOR at these schools is due to fall by the end of the forecast period (2025), the October 2020 census shows a NOR of 1,333 which is 46 above the forecast for September 2020 of 1287.

#### **4. Location of Site**

There is a S106 agreement attached to the outline planning permission that provides for land to be allocated for the provision of a new primary school. The indicative site plan for the new school can be found in Appendix 2.

#### **5. Access to Site and any planning requirements**



The school is being funded through Local Authority funding and CIL contributions from Somerset West and Taunton, the local planning authority. Detailed planning permission will be submitted to Somerset County Council as the Planning Authority in 2021.

#### **6. Date to be opened and number of places**

It is anticipated that the school will be opened in September 2023 as a 420-place primary school with early years provision.

Initially, the school will offer up to 30 reception places and depending on demand a mixed Y1/Y2 class from September 2023.

#### **Nursery Provision:**

A 52-place nursery will be provided for 2, 3 and 4-year olds and it is anticipated that this will be operational from September 2023. SCC is open to proposals from the academy provider as to whether this provision will be operated by the academy or a third-party provider.

#### **Planned initial PANs, number of forms of entry on opening and expected rate of growth:**

The proposed PAN is 30 with future plans to expand up to 60. It is anticipated that the new school will open initially with 30 places in Reception and will grow year on year, building up to a capacity of 420 primary places. However, this will be reviewed and depend on demand for primary school places from the Orchard Grove housing development and the age range of children moving into the area.

#### **7. Age range and gender**

The school will be co-educational and for children aged 2 to 11 years of age.

#### **8. School Premises**

The school building will be procured by Somerset County Council.

In November 2020 SCC members declared a Climate Emergency, with an aim to become carbon neutral by 2030. This target will be incredibly difficult to achieve, balancing the funding requirements of this ambition alongside the budgetary restraints affecting all councils across the country. This work can be broken down into two distinct groups, new builds and existing buildings, the former being far easier to deliver. As such, where funding allows, we are exploring the delivery of net zero carbon new school builds from 2023.

The Council is currently working on two designs for the new primary school at Comeytrove, one being Passivhaus in design, the other being a more traditional build with significant carbon reducing features. One feature of both designs is the sole use of electricity, and zero use of fossil fuels (gas).

The design we choose will ultimately depend on funding, but we are confident either option has the potential to deliver significant revenue savings for the school. However, with the declaration of a climate emergency and the aim to be carbon neutral by 2030, it means we cannot treat this build as a single project. If we are to achieve this target, we must establish a method of creating a rolling fund in order to afford future projects. To do this we will seek to utilise the financial savings from each project to assist the funding of the next.

It is for this reason that we are exploring the potential for schools delivered to this increased specification to assist us in achieving this incredibly important work, by investing some of their saving back into the local authorities programme of works. The mechanism and values for this have yet to be confirmed, and we would seek to discuss this with the successful sponsor.

Sponsors will not have the opportunity to influence the design of the building as we have procured a model school (pre-designed) but will be able to have an input with regard to the internal finishes and decorations. For example:

- Internal wall decoration (colour choices) in all areas.
- Flooring colour choices against a specified manufacturer's range chart in all areas.

- Flooring changes from vinyl to carpet or vice versa in some areas, albeit this may well attract an additional cost.
- Sponsors can specify the loose furniture, up to the agreed budget provision that will be agreed with the Council. A guide budget is 100k
- In the event that the Sponsor chooses not to use the services of Somerset County Council IT, the guide budget for ICT is 200k.

Proposers wishing to change or alter the proposed school design will be expected to fund any additional costs.

The school building will include:

- 14 classrooms
- Nursery classroom with quiet room, separate office and foundation stage playground
- School hall
- Activity space
- Ancillary spaces

Although there will be no specialist classrooms for pupils with special educational needs, the school building will be compliant with the requirements of the Equality Act 2010 and there will be a SENCO Office. The school will also have a medical therapy suite. The building is being designed to accommodate further expansion if required.

The indicative floor plans with the proposed layout of the building are available in Appendix 3, but please note that these are subject to change prior to the submission of the formal planning application.

The design of the building will allow for further expansion if required.

## **9. Special Education Needs Provision**

There will be no specialist resource base provision for pupils with special education needs. The academy will be expected to serve children with special educational needs in its local area for whom mainstream education is considered appropriate.

See <https://www.somerset.gov.uk/education-and-families/special-educational-needs-and-disabilities-send/>

The needs of vulnerable children and young people should be met locally wherever possible.

The new school must provide an inclusive learning environment in which all pupils, including those with special or additional educational needs and those with disabilities, are supported and enabled to make appropriate progress.

#### **10. Community Use/shared facilities**

No specific community spaces are being provided at this school. However, the successful sponsor must ensure that the school plays a key role within its local community.

The Local Authority has already had enquiries about the potential for some community use of the school hall after school and in the evenings and weekends. It should therefore be recognised by any potential academy sponsor that there will be an expectation amongst members of the local community that community use is offered.

#### **11. Catchment area**

The Local Authority is recommending a catchment area for admissions that mirrors the redline boundary of the new Orchard Grove housing estate. The redline development drawing of the Orchard Grove Development can be found as Appendix 4.

#### **12. Proposed admission arrangements**

All sponsors are required to abide by the DfE School Admissions Code and the School Admission Appeals Code issued under the School Standards and Framework Act 1998. Under the School Admissions Code proposers will be required to participate in SCC's co-ordinated scheme for the normal admissions round and the Somerset Fair Access

Protocol. Within its admission arrangements the academy sponsor should give priority to local children.

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

The admission number for the reception year will be 30 places and build year on year. It may, however, be necessary over time to open classes for other year groups to meet the needs of older children arriving in the area (normally year 1 and year 2). These classes may need to be, or start as, mixed age classes to ensure that a sustainable class size can be achieved.

The Sponsor will be expected to have oversubscription criteria that are reasonable, clear, objective, procedurally fair and which comply with all relevant legislation. They will also be required to participate in the Council's co-ordinated scheme for normal admissions rounds. There is an expectation that they will participate in the Council's in-year Fair Access Protocol.

Dependent on progress with the Funding Agreement, the Council hopes that the new school can be included in the co-ordinated admission scheme for the 2023-24 academic year (so only one Reception place offer is made in 2023).

### **13. Transport arrangements**

In accordance with the Somerset County Council school travel policy  
<https://www.somerset.gov.uk/education-and-families/school-transport/>

There will be no transport arrangements to the school because it will be accessible on foot or by bicycle.

### **14. Character/Ethos of school**

Our vision is for Somerset to be the most forward looking area in England for education and learning so that we are the best place for children and young people to grow up, learn, develop and achieve.

Somerset should be a place where families thrive and all children learn and develop well from the earliest years so that they are ready to succeed at school, have excellent foundations for learning and are equipped well for achievement in life, no matter what their background.

In Somerset we have the same expectations for every child and young person to make good progress in their learning, to achieve well and to have the best opportunities for an independent economic and social life as they become young adults.

Every child and young person should go to a good or outstanding early years setting and school, have access to the best teaching, and benefit from schools and other providers working in partnership with each other to share the best practice as they continue to improve.

We will see provision that ensures:

- All children, young people and their families, who need support, receive the right sort of help, in the right place, at the right time and are not disadvantaged by their circumstances
- Every child and young person has the opportunity to attend a good or outstanding early years setting and school and benefit from the best teaching
- All Somerset's children have high aspirations for their future, and are enabled and provided with equality of opportunity to achieve those aspirations

We will see children who:

- Are resilient individuals
- Have British values and respect for others
- Understand and respect for the environment
- Have a passion for life-long learning
- Have the attitudes and skills that enable them to contribute positively to the local and global community, now and in the future

Potential sponsors should aspire to Somerset's vision and work in partnership with the Local Authority to achieve this.

It is anticipated that the new academy will have the opportunity to join the Taunton Learning Partnership. Members include primary schools in Taunton and secondary schools across Somerset.

#### **15. Equalities impact analysis**

The proposed new build will be fully accessible for disabled users including staff, pupils and visitors, with the proper facilities and provisions in place to cater for them, pursuant to statutory obligations set out in Equality legislation and that brought together under the umbrella provisions of the Equality Act 2010. No negative impacts have been identified (See Appendix 5 - Equality Impact Assessment).

#### **16. Accountability of Academy Sponsors**

SCC recognises that statutorily academy sponsors are accountable to the Secretary of State. However, a key role for SCC is supporting parents and families through promoting a good supply of strong schools. Academy sponsors and new academy proposers need to be accountable for their performance both to elected members and officers given SCC's statutory role as champions of educational excellence and for vulnerable children and families.

As a minimum SCC would expect that:

- Sponsors/proposers will attend Scrutiny Committee and any officer led school quality assurance meetings, upon request, to report on progress of the school/s they are working with
- Sponsors/proposers will provide data as requested by SCC to enable SCC officers to monitor the performance of their school/s
- SCC officers would be able to attend any meeting established by a sponsor to monitor the performance of the school against the issues identified in an Ofsted inspection report

It is SCC's wish that the proposer/sponsor would be agreeable to the appointment of a Local Authority Governor to the Governing Body.

## Section C – VISION

This is your opportunity to tell us in your own words about the overarching vision for your school and how it informs your education plan. You will need to demonstrate in later sections that the vision is both deliverable and affordable within the available funding. Your vision should be coherent and consistent with the other sections of your application. We will be specifically looking for where your vision is embedded in strategic documents that guide the work of the trust, and we will be looking for examples of actions taken by the trust to realise the trust's vision.

In the selection process, priority will be given to trusts whose vision aligns with local priorities for education, specifically education that is:

- 1) **Inclusive** – an open trust that is welcoming of all pupils, respects and celebrates their diversity, and is committed to overcoming all barriers to participation.
- 2) **Ambitious** – a determined trust which finds and builds upon pupils' strengths and talents so that having a less advantaged background is not a barrier to achieving at the highest levels.
- 3) **Community-focused** – a outward-looking trust that builds strong relationships with families, the local community and a wide range of organisations that can support better education for all.
- 4) **Empowering** – a listening and humble trust whose policies and practices provide high support and high challenge to both staff and pupils.
- 5) **Responsible** – an aware trust that places an emphasis on the long-term, securing environmental and financial sustainability and creating social value.

## Section D – EDUCATION PLAN

### Curriculum and pedagogy

Describe your approach to curriculum delivery and pedagogy, specifically:

- Describe the theory or research drives your curriculum planning and pedagogical approaches. Within Somerset there are a group of schools that use a Meta-Curriculum approach, for example. If you would like more information about this



model contact Keith Ford ([kzford@somerset.gov.uk](mailto:kzford@somerset.gov.uk))

- Provide examples of the curriculum planning documentation that you intend to use, for example, curriculum overview, unit overview, knowledge organiser, etc.
- Outline how much time would be given within the curriculum to: Music, Art, Religious Education, RHSE, PE, Design and Technology, and Computing.
- Outline your approach to extra-curricular activities and provide data on take-up in trust schools, by pupil characteristic where available.
- Provide an overview of how the school would meet the requirements of the Early Years Foundation Stage statutory guidance, and characteristics of effective learning.
- Outlines of policies and procedures that meet the requirements of the EYFS and local conditions for offering the early years entitlements in Somerset.
- Describe the trust's approach to supervision that supports staff understanding of evidence-based practice.
- Outline how the trust supports a 0-19 view of curriculum and learning, including specific activities and approaches that help secure learning across transition points but also prior to entry and in the next phases.

### **Assessment**

- Explain the principles that drive your assessment practices and how these align with your approach to the curriculum.
- Provide an assessment plan that outlines how frequently pupils will be assessed and the manner in which that assessment will take place, excluding statutory assessment but including the approach to formative assessment and quizzing.
- Provide examples of your assessment documentation, including example reports to parents and internal monitoring reports.
- Provide evidence of successes in enabling vulnerable or disadvantaged learners reach greater depth.

### **Behaviour**

- Explain the theory and research that drive your behaviour management policies and practices.
- Provide the behaviour management policy that you intend to use within the school.
- Outline the training the trust provides on SEND, behaviour, social and emotional learning, meta-cognition and/or parental engagement
- Explain how your approach to behaviour relates to your vision for inclusion and give examples of successes the trust has achieved in this regard.

- Describe any partnerships that trust schools are engaged in that support pupils to manage their mental health, emotions and/or behaviours.

### **Inclusion**

- Outline the principles that drive the trust's approach to inclusion and describe specific practices used in trust schools that have been effective in retaining pupils who might otherwise have been placed in another setting.
- Describe how the school would provide for the needs of pupils with SEND, on the basis that this is likely to be around 2% of pupils with EHCPs and 13% of pupils classed as SEND support.
- Describe any partnerships that trust schools are engaged in that support effective transition for pupils, particularly those that are vulnerable, naming the schools and Early Years providers involved in those partnerships.
- Outline the trust's approach to parental engagement including specific tools, events and/or approaches used in trust schools and feedback from parents on the effectiveness of these.

### **Cross-cutting priorities**

- Describe how the school would play a part in addressing the **climate emergency** and how the trust currently operates in promoting environmental resilience and sustainability, including:
  - Recycling rates within trust schools
  - Measures of success in reducing waste and single use plastics
  - Investment in energy efficiency
  - Total carbon emissions and trajectory over time
  - Climate emergency in the curriculum
- Describe how the school would play a part in building a **strong local community**, and how the trust currently operates in promoting social value, including:
  - Provide the names of community and voluntary organisations the trust collaborates with for the benefit of pupils or the community and detail the nature of this collaboration.
  - Detail any local partnerships that trust schools actively contribute to, for example, Community Learning Partnership, Early Years Community, School to school improvement.

## **Section E – CAPACITY AND CAPABILITY**

### **Leadership and management**

- Outline the skills and capabilities of the Trust Senior Leadership Team.
- Describe the delivery model within the trust, including as a minimum Estates, ICT, Finance, HR, Communications, CPD and workforce and Education improvement (eg curriculum, assessment, behaviour and pedagogy).
- Supply an overview of trust internal assessment data and improvements over time.
- Supply an overview of trust internal management information that demonstrates the trust's areas of management focus.
- Describe the trust's financial management strategy and any examples of efficiencies that have been delivered that have enabled re-investment in education.
- Describe the capacity in FTE that would be made available to manage the project to deliver the free school, and outline the skills and capabilities of the individual(s) who would be involved.
- Provide a robust three- to five-year business plan for early years that includes offering the early years entitlement for 2, 3 and 4 year olds and the extended entitlement for eligible 3 and 4 year olds.
- Supply policies and procedures supporting safe and effective 2-year-old provision.

### **Governance and accountability**

- Outline the skills and capabilities of the Trust Board based on the most recent skills audit.
- Describe how the Trust Board works with school governance and/or leadership arrangements to provide delegated accountability and oversight.
- Supply an overview of data from the most recent pupil, parent and staff surveys.
- Describe arrangements for pupil voice within the trust.
- Describe how the Trust Board assures itself that the management practices within the trust are effective and what checks and balances are in place to address the risk of bullying by senior leaders.

### **Staffing**

- Provide a staffing structure over five years that aligns to pupil growth projections.
- Outline the support that will be available to the school from central trust resources.
- Outline the local, sub-regional and/or regional organisations that the trust has established relationships with that provide external challenge or support. Describe the nature of that relationship and what help has been accessed by trust schools.

## **Section F – FUNDING AND COSTS**

### **Funding**

The capital to build the school is secured through local authority funding and Community Infrastructure Levy.

Provision for pre and post revenue funding is included with the Local Authority's growth fund but will be subject to discussion between the successful sponsor and the Local Authority and will be funded from the Dedicated Schools Grant growth fund.

The School Finance Regulations 2017 Schedule 2 – Part 2 states that SCC's growth fund should cover the expenditure to be incurred before the opening of new schools to fund the appointment of staff and to enable the purchase of any goods and services necessary in order to admit pupils.

These usually include staffing costs such as those of the Headteacher, caretaker and relevant premises and resources costs as well as project management costs.

As a guide for a new Primary School the following will be funded:

- Project delivery - £60,000\*
- Pre-opening staff costs - £70,000\*
- Pre-opening premises costs - £10,000\*

\*subject to negotiation

Curriculum resource allocation – £9,000 per cohort and a payment schedule to be agreed with the successful Trust according to speed of growth.

The initial budget allocation will be forecast using Somerset's funding formula. Somerset will guarantee revenue funding for a minimum of 30 pupils for a 1 form entry and a minimum of 45 pupils for reception and mixed year 1/2 class.

As the new school will be an Academy, the successful sponsor will need to enter into a revenue funding agreement with the Secretary of State for Education. The DfE currently provides £25,000 towards the set up costs to the successful sponsor.

#### **Financial plan for pre-opening costs pro-forma**

The proforma for the financial plan can be found as Appendix 6.

### **Section G – IMPACT AND EQUALITIES ASSESSMENTS**

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

See Appendix 5 - Equality Impact Assessment

The provision of a new 14 class primary school in Taunton to meet pupil place demand that will arising from a significant housing development on the south west side of Taunton between the existing parishes of Comeytrowe and Trull.

The Council is looking for an Academy Sponsor who will run the school for the benefit of the whole community, adopting admission arrangements that give priority to the local community, regardless of their faith or other affiliation.

### **Section H – FURTHER DETAILS & APPLICATION FORM**

Bids must be submitted using the Free School Presumption application form, provided with this specification. The model criteria for local authorities and proposers seeking to establish new 'presumption' schools Annex C can be found with the following link.

[Free school presumption - Model criteria for local authorities and proposers \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

**The completed Application Form and Financial Plan must be completed and returned via** the Supplying the South West Portal no later by 5.00pm on the Wednesday 3<sup>rd</sup> August 2021. Two hard signed copies of the application should also be delivered to County Hall by the same date and time. If shortlisted, please note that the selection process of a preferred sponsor will include a formal presentation to a panel. There are two provisional dates for the presentation day (14<sup>th</sup> September 2021 and 28<sup>th</sup> September 2021).

## **Background Documents**

Somerset's Strategic Vision for Education

<https://www.somerset.gov.uk/education-and-families/somersets-strategic-vision-for-education/>

School transport and Special Educational Needs and Disabilities

<https://www.somerset.gov.uk/education-and-families/school-transport-and-special-educational-needs-and-disabilities/>

School Place Planning Infrastructure Growth Plan 2019

[www.somerset.gov.uk/EducationIGP](http://www.somerset.gov.uk/EducationIGP)

## **List of Appendices**

Appendix 1 - Proposed location plan of the Orchard Grove development

Appendix 2 - Indicative site plan for the new primary school

Appendix 3 - Indicative floor plans

Appendix 4 - Redline development drawing

Appendix 5 - Equality Impact Assessment

Appendix 6 - Financial Plan for pre-opening costs