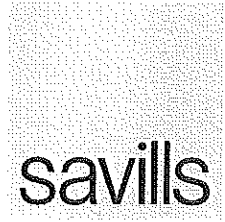


3<sup>rd</sup> July 2018



Planning Services,  
Waverley Borough Council,  
The Burys,  
Godalming, GU7 1HR

33 Margaret Street W1G 0JD  
T: +44 (0) 20 7499 8644  
F: +44 (0) 20 7495 3773  
savills.com

Dear Sir,

### **Pre-application submission - Broom and Lees, Charterhouse School**

#### **Background**

Charterhouse was founded in 1611 and moved to its present site near Godalming in 1872. The site measures some 250 acres and contains the School's administrative, educational, accommodation and sporting facilities in a 'campus' style environment. The historic core of the School (which contains mainly educational and administrative functions) is to the east of the site (close to Charterhouse Road).

Whilst the School grounds fall within the Green Belt, it contains a significant amount of activity and buildings and amounts to a major developed site within the Green Belt.

#### **Charterhouse – Looking Forward**

Charterhouse is currently full and application numbers are expected to be strong going forward. However, even with pupil numbers at capacity, private education is a competitive business and Charterhouse needs to develop and improve to remain popular.

Demographic and economic pressures have combined to set challenging operational conditions and a number of private schools have been lost to the independent sector since the 2008 economic downturn. Whilst pupil numbers in the sector have generally remained consistent, this has supported by a strong influx of overseas student.

Therefore Charterhouse cannot stand still. The School is built on a strong foundation and is one of the great historic public schools of England. But there needs to be investment in School facilities and accommodation for pupils. Current pupil numbers provide sufficient income to operate and manage the School day to day but more needs to be done to maintain the existing buildings and take the School forward.

The age and historic nature of Charterhouse is a key feature of the School but it is a disadvantage in estate management terms. Maintenance of historic buildings is inevitably expensive and the School must spend significant amounts of money maintaining the listed and historic buildings. Even the modern 'new houses' (built in the 1970s) are reaching an age where they require significant investment to ensure they are fit for purpose. The expectations of parents and pupils are ever increasing and the School needs to invest in properties to (for example) provide more toilet and bathroom facilities.

Offices and associates throughout the Americas, Europe, Asia Pacific, Africa and the Middle East.

Savills (UK) Limited. Chartered Surveyors. Regulated by RICS. A subsidiary of Savills plc. Registered in England No. 2805138.  
Registered office: 33 Margaret Street, London, W1G 0JD





Private boarding education is an increasingly limited marketplace. In general business terms there is little opportunity for a meaningful increase in fees without significantly affecting demand. The School could look to expand its demand from overseas students, but must be careful not to lose the ethos and 'feel' of a traditional English school, which is one of Charterhouse's popular features and receives positive feedback during the entrance process.

For these reasons the School has taken the strategic decision to increase the number of students within the School. The key opportunity to increase pupil numbers is to open the School to girls in all years and Charterhouse has recently announced that it will be welcoming girls into Year 9 from September 2021.

This decision has not just been made to increase pupil numbers. Full coeducation at Charterhouse is an important decision that the Governing Body has taken as part of its development strategy for the School. The School believes that the best preparation for a rewarding and fulfilling life is a first class education for boys and girls learning together as partners and equals – just as they will work together as adults to take on opportunities and tackle challenges.

The Charterhouse Sixth Form has been coeducational since 1971. It is now proposed to enter girls into the Fourth Form (Year 9) in September 2021. Following that, there will be girls in every year group from September 2023. As the School is currently full, the School roll will grow over the next decade to around 1,000 pupils, the increase representing additional places for girls.

#### **Charterhouse – Local Social and Economic Impact**

Charterhouse has a significant social and economic impact on both Waverley Borough and Surrey. The School employs some 450 people (full and part time) making it one of the largest employers in the Borough.

The School has over 800 pupils which has a positive economic impact on Godalming (in terms of contribution to local shops and services) as well as visits from relatives who stay locally and contribute to hotels and restaurants. The School has an annual expenditure of £29m (2017/8) most of which will be spent locally and go back into the community. There is also the knock-on effect of many direct sub-contractors and indirect economic benefits (e.g. food, domestic services, building maintenance etc.)

Charterhouse is very much a local School. Many pupils come from Surrey and surrounding areas.

#### **Masterplan Development**

We met with you in November to discuss the emerging Masterplan for the School. This included the development necessary to accommodate the proposed expansion:

- Four proposed boarding houses (to the south of the 'new' (1970s) houses)
- Extension, alteration and improvement to the 'new' (1970s) houses
- Alterations to the Central Dining Room
- Alteration and improvement of the old School boarding houses
- Conversion and extension of estates block to create new Sixth Form Centre
- Extension to Art, Drama and Music blocks
- New Classrooms adjacent to Girdlestoneites boarding house
- Extension to Sports Hall
- Reorganisation and pedestrianisation of the historic core of the School and new car park
- New Estates block



Following on from your positive pre-application response, the School now plans to develop incrementally. It is likely that the first planning application will be for two new boarding houses, to accommodate the first intake of additional pupils. We envisage commencing pre-application discussions with you shortly.

## **Funding**

In very general terms, the School's accounts (which are a matter of public record) demonstrate that it covers its costs with a small surplus every year. Any surplus is spent on maintenance projects or improving the education provided. There is no significant annual surplus that can be used to build up sufficient funding for an infrastructure project.

The proposed expansion of the School will have a long term positive effect on School's revenue through the admission of additional pupils. However, that expansion will require significant capital expenditure to pay for new buildings and facilities which must of course be funded long before the revenue from that expansion is received.

Alterations to Chetwynd to accommodate new girls  
Reconfiguration of the Central Dining Rooms and new roof  
Entrance and arrival improvements  
New boarding houses 1&2  
Science and Maths improvements Phase 2 & 3

The School has reached its maximum reasonable borrowing levels.

So the School can fund the boarding houses but not the various education and estate projects that are necessary to implement the expansion. As set out above, over time, as the School admits extra pupils, the revenue will rise to provide funding for projects. However, in the short term, certain projects (notably the Art and Music blocks) need to be commenced to enable the expansion. Therefore, put bluntly, the School needs to raise money pay for these capital projects.

## **Broom and Lees**

Broom and Lees Playing Fields is separate from the main Charterhouse estate as it is sited on the opposite side of Hurtmore Road. Whilst the geographical separation is small, the functional separation is significant. Broom and Lees is the least preferred option for sports pitches within the School because of the distance from the main School area, the requirement to use the footbridge and the need to carry sports equipment a significant distance. The use of the fields is not inclusive as it requires access via a stepped footbridge. For these reasons, Broom and Lees is only used when all other fields in the School are booked and as such is not used very much.

The School has taken the decision that it can dispose of Broom and Lees playing fields without significantly affecting the operations of the School. There are sufficient sports pitches elsewhere within the School grounds



that could be more efficiently used. If necessary the playing fields could be relocated by reorganisation of sporting facilities within the main School grounds, which would be a far more efficient arrangement for the operation of the School. There is sufficient room within the School grounds to ensure that the overall sporting provision is maintained, if not improved.

Accordingly, a proposal has been worked up for the residential development of Broom and Lees. This is set out below but broadly allows for 132 dwellings. Needless to say, the capital receipt from the sale of Broom and Lees will be reinvested into the implementation of the School's masterplan.

The receipt from residential development on Broom and Lees depends on a number of factors, including the density of development, broader housing market issues and s106/affordable housing requirements. In very broad terms, it is expected that the residential development set out below could raise

This receipt would allow the School to fund the immediate building needs arising from improvement and expansion, namely the Art, Music and Drama blocks plus further additional classrooms.

Art  
Music  
Drama  
Hashrooms (Classrooms)

**TOTAL**

The remaining projects can then be addressed, over time, as revenue increases. (For the avoidance of doubt the sequencing of projects remains under review and may change over time. The above is a very high level outline that will be refined prior to the submission of a planning application for Broom and Lees.)

In summary, therefore, the case put forward is that residential development on Broom and Lees would provide essential funding towards the expansion of the School. Without a capital receipt arising from the sale of Broom and Lees, the School has no way to fund the improvement and expansion (beyond the borrowing set out above).

**Broom and Lees Proposal**

Our current proposal for Broom and Lees is the construction of 132 dwellings as shown on the attached plan. The indicative mix of dwellings is proposed to be (broadly) 8% 2 beds, 61% 3 beds, 16% 4 beds and 15% 5 beds.

The proposal also provides a community building, which has been added as a result of consultation with the Ward and Town Councillors. We are in discussion with Waverley Town Council about the administration of the building. A children's play area is also proposed.

The proposed density, mix and layout of housing has been developed to create a residential scheme that integrates well into the established context of the area. The density (c 22 dwellings per hectare) is purposefully low. Proposed buildings are set well away from the site edges to minimise the effect upon surrounding residential properties and ensure that mature trees and screening can be retained. As such larger houses are preferred to a higher density scheme that would necessarily include more apartment blocks.

## **Planning Policy Assessment**

### **National Planning Policy Framework**

The Framework sets out a general approach to development management, and encourages a positive approach to development. It describes how applications should be supported if their outcomes are beneficial, and applies a presumption in favour of sustainable development.

The Framework states at paragraph 72 that the Government *"attaches great importance to ensuring that a sufficient choice of school places is available to meet the needs of existing and new communities. Local planning authorities should take a proactive, positive and collaborative approach to meeting this requirement, and to development that will widen choice in education. They should:*

- *give great weight to the need to create, expand or alter schools; and*
- *work with schools promoters to identify and resolve key planning issues before applications are submitted."*

The Framework also states that the Government is committed to securing economic growth in order to create jobs and prosperity, building on the country's inherent strengths, and meeting the twin challenges of global competition and of a low carbon future (paragraph 18). Education is clearly one of the UK's inherent strengths. The education sector has grown in recent times to become a separate economic sector in its own right within the UK. From universities to private schools, it is becoming recognised that the UK has become a worldwide market leader in the provision of education. Therefore education is a key component of economic growth. The Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth (paragraph 19 of The Framework). Planning should operate to encourage and not act as an impediment to sustainable growth. Therefore significant weight should be placed on the need to support economic growth through the planning system.

In summary, the Framework supports both education development and economic growth. It can be considered, in principle, to be strongly in favour of education related development.

Local Plan Policy CF3 relates to educational establishments. The policy indicates that the Council recognises the importance of these establishments, such as Charterhouse School, and the expansion of these schools will be supported provided proposals comply with this policy. The policy states that proposals for extensions and adaptations to existing establishments and associated facilities will be permitted provided that certain criteria are met.

Broom and Lees is within the Green Belt. Specific advice on the Green Belt is set out in paragraphs 79 – 92 of The Framework. Generally, development should not be permitted unless it is either for a type of development appropriate to the Green Belt, or Very Special Circumstances exist where the considerations in favour of a proposal outweigh the harm to the Green Belt.

### **Green Belt Assessment**

Therefore the 'town planning' case is that the need for and benefits arising from expansion of Charterhouse is a Very Special Circumstance that will outweigh the harm arising from the inappropriate development in the Green Belt (residential development at Broom and Lees).

To justify this assessment, it is necessary to consider:

1. The level of harm arising to the Green Belt from the residential development at Broom and Lees
2. The Very Special Circumstances
3. Whether the Very Special Circumstances are sufficient to outweigh the harm

### Harm to the Green Belt

Broom and Lees within Parcel C19 of the Waverley Borough Council 2014 Green Belt Review (*the north and north western fringes of Godalming at Farncombe/Binscombe*). The Green Belt Review concluded that *“there is potential to remove these segments, either in whole or in part, from the Green Belt without there being significant damage to its overall function in this area.”*

Broom and Lees makes a minimal contribution to the Green Belt and does not contribute to any of the five purposes of including land within the Green Belt. It is a small, private open space within the built up area of Godalming and the Green Belt designation is a historic legacy from before Godalming expanded to the north west.

Broom and Lees is not the type of land that would traditionally constitute Green Belt land. Green Belts were originally conceived to surround settlements and prevent their expansion into the surrounding countryside. Broom and Lees is surrounded by established residential development and could not be considered to be at the edge of the built up area of Godalming, which in fact continues some distance to the north and west. The development of these small pockets of open land would have no impact on the surrounding countryside.

The aerial photograph below demonstrates that Broom and Lees is surrounded on four sides by development (the School is to the south). The ‘edge’ of Godalming is further to the north and west. If the Green Belt boundary was being drawn today, certainly Broom and Lees would not be included. The boundary would go around the proper edge of Godalming.



The Framework sets out five purposes of including land within the Green Belt. We assess these for Broom and Lees as follows:

<b><i>To check the unrestricted sprawl of large built-up areas</i></b>	Broom and Lees is surrounded by development on four sides. Residential development on Broom and Lees would constitute infill development. It would not cause 'sprawl'. The edges of Godalming are already defined (further north and east than Broom and Lees).
<b><i>To prevent neighbouring towns from merging into one another</i></b>	Given its location entirely within Godalming (and surrounded on four sides by established development), development on Broom and Lees would not have any effect on the relationship between Godalming and neighbouring towns.
<b><i>To assist in safeguarding the countryside from encroachment.</i></b>	Broom and Lees constitutes manicured sports pitches. It is not countryside in the conventional sense. Therefore there will be no encroachment on the countryside.
<b><i>To preserve the setting and special character of historic towns.</i></b>	Development on Broom and Lees would have no effect on the setting and special character of historic towns.
<b><i>To assist in urban regeneration by encouraging the recycling of derelict and other urban land.</i></b>	Local housing need is such that there is no lack of need and incentive for the recycling of derelict and other urban land.

All Green Belt land is protected for its own sake. The proposed development is, by definition, inappropriate and consequentially there must be some level of harm. However, the fact that development on Broom and Lees would have no strategic impact on the wider landscape context of Godalming and the related purpose of including land within the Green Belt means that the harm is very minimal.

The design and layout of the Broom and Lees proposal also limits harm. Proposed buildings will be in line with surrounding building heights. The proposal is of low density, which allows landscape to be retained through the site. Buildings are well set back from the edges of the site and therefore the development will sit within the established mature landscape setting. The development will only be visible in short terms views from part of Hurtmore Road and the surrounding rear gardens (where visibility will be mitigated by separation distance and retention of established, mature trees and vegetation). The proposed development will not be visible in long range views.

In summary, the harm arising from the proposed development is therefore considered to be very minor. There is inevitably some harm arising from building on the Green Belt. But in strategic terms, there is no harm at all when compared to the five purposes of including land in the Green Belt.

### **Economic Benefits arising from Expansion of the School**

The Council's Draft Economic Strategy 2018 - 2023 highlights that one of the 'strengths' of Waverley's economy is "a strong education sector, home to an outstanding range of 80 excellent state primary, secondary, special



and independent schools (such as Charterhouse and Cranleigh School) that attract pupils and families to the area and support 8,000 jobs (ONS, 2016).”

The Economic Strategy states that the Council will take a place-based partnership approach to economic development:

*“Key employers (including businesses and educational institutions) and the private sector (e.g. developers) have an important role to play in investing in the local economy, safeguarding existing jobs, creating new employment opportunities and delivering jobs and prosperity in the borough. The council has a crucial role to play in supporting and developing business partnerships, engaging with local businesses, understanding their problems and working with them to find efficient solutions. It will use its planning policies to support the continued prosperity of the borough and maximise its network of partnerships to influence strategic decisions (such as securing investment in local infrastructure improvements).”*

As set out above, Charterhouse already has a significant social and economic impact on both Waverley Borough and Surrey. The School employs some 450 people and has an annual expenditure of some £29 m (2017/2018). Even if the development of Broom and Lees was simply necessary to maintain the status quo, then this would be a compelling Very Special Circumstance.

The expansion of Charterhouse will give rise to significant additional social and economic benefits. The extra students will spend money locally. Their parents and relatives will visit and stay (and spend more money). The School will employ more people and this will lead to more spending locally. The School will also employ more contractors and suppliers which will also lead to 'knock on' expenditure. The estimated financial benefits can be summarised as follows:

- an additional 80 on site jobs (64 FTE) (at least)
- an additional £1.5 m of local expenditure
- an additional £1.5 m of Gross Value Added ('knock on' expenditure from the School's expenditure)

In addition to the above, Charterhouse presents taxation savings through the provision of privately funded school places. It is estimated that it costs the taxpayer £6,300 to provide each child with a secondary education. The current 820 pupils within the School represent tax savings of approximately £5.1 m. per annum. This will increase to approximately £6.3 m. per annum after the expansion. Many Charterhouse pupils live in Surrey and therefore their private education results in a saving to Waverley and Surrey taxpayers.

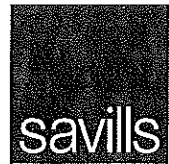
For the above reasons, the expansion of Charterhouse (subsidised by the development of Broom and Lees) will lead to the expansion of the School (an established local business). This is exactly the type of economic generation development anticipated and prioritised by the Council's emerging Economic Strategy.

### **Social Benefits**

Charterhouse provides a wide range of social benefits. Key amongst these is the provision of bursaries. Charterhouse currently provides 45 bursaries, of which 21 subsidise 90% or more of School fees. Expansion would see another 6-8 full bursaries provided. In addition:

- Charterhouse provides public access to its sports facilities, managed by Charterhouse Club. The club currently has 1,820 members.
- Charterhouse provides support to local state schools, including use of its sports facilities, use of school minibuses for trips and sports events, science revision classes for GCSE pupils, a musical outreach programme and teacher training.
- Charterhouse hosts the Surrey Para Games, a sports day for students with special educational needs and disabilities, aged 11-15 years, from Surrey schools.





- Charterhouse heavily discounts the hire of our facilities to local groups, organisations and charities such as Godalming Choral Society, Godalming Theatre Group, Guildford Symphony Orchestra, The Army Benevolent Fund, The Simon Trust and Shooting Star Chase.
- The Godalming Run crosses the School grounds every year.
- Charterhouse provide venues for the Godalming Music Festival.

Expansion would allow us to continue to provide these existing social benefits and hopefully provide more. We are open to discussions with the Council and local residents about ways in which we can provide more benefits to the local area.

### **Very Special Circumstances**

The Very Special Circumstances amount to the fact that the development in the Green Belt will fund the next phase of expansion of the School. There is no other funding for the School to expand. This gives rise to the following benefits:

- the provision of new School places to widen choice in education;
- the improved diversity and inclusivity in School places arising from the admission of girls;
- the protection and enhancement of an established education facility in the a challenging marketplace;
- the protection and enhancement of one of Waverley's major employers and economic generators;
- the creation of additional employment opportunities through expansion of the School;
- development that will significantly benefit the local economy;
- the wide range of social benefits provided by the School;
- and the investment in and enhancement of listed buildings.

Housing delivery alone is not typically found to constitute a Very Special Circumstance. However, the provision of housing and affordable housing for which there is significant need both locally and nationally is considered to weigh strongly in favour of the proposal.

Most importantly, the expansion will safeguard the long term future of the School. The Governors continue that the expansion of the School is essential. Expansion means that in the long term, the School will be able to keep doing the things it has done for so long. It will continue to educate pupils, provide bursaries, employ staff (including contractors and suppliers). It will also be able to safeguard a historic and iconic site and ensure the listed building are retained in employment use.

### **Planning Balance**

The Framework states that 'great weight' should be given to the need to expand or alter schools. It gives strong guidance, therefore, that the expansion of a school amounts to a Very Special Circumstance capable of outweighing harm to the Green Belt.

Our conclusion on the Green Belt balance that the harm arising is very minor and the Very Special Circumstances are many. Significant weight should be given, in accordance with paragraph 72 of The Framework, to the need to expand the School. Therefore the minor harm to the Green Belt is considered to be easily outweighed by the Very Special Circumstances.

### **Precedent**

There are many examples where planning authorities, Inspectors and the Secretary of State have made similar findings. For example, Oaklands College in St Albans was granted permission, by the Secretary of State, for a



new school supported by enabling development of 348 dwellings in the Green Belt. The Secretary of State and Inspector agreed (see paragraph 21) that *“overall there is agreement between the parties that significant weight should be attributed to the educational benefits of the proposal and there is no evidence from the Council to demonstrate that a lesser option could secure the educational improvements needed by the College. The Secretary of State therefore agrees with the Inspector that the delivery of significant improvements to the College weighs heavily in favour of the proposal.”* The Secretary of State concluded that *“the considerations summarised above clearly outweigh the harm to the Green Belt, justifying the proposal on the basis of very special circumstances.”*

Whilst we entirely accept that each case must be determined on its merits, it is informative to note that a similar case resulted in the finding, at Ministerial level, that improvements to a School justified significant development in the Green Belt.

### **Form and Content of the Application**

We would also welcome your advice on the supporting material that you would require to accompany the application. In particular, we anticipate that you are likely to want to undertake some form of financial analysis of our Very Special Circumstances case. It would be useful for us to understand what material you would like to consider and the likely process that you will follow. Most of the information is available now and it may be beneficial to consider this as part of the pre-application process.

### **Summary**

Charterhouse makes an important contribution to Waverley both economically and culturally. The masterplan proposal set out the long term future for the School to ensure that it continues to thrive and make such contributions to the community.

Residential development at Broom and Lees will fund the next stage of the implementation of the masterplan. This will create additional education places and jobs. Planning policy at national and local level offers strong support for education related development.

We consider that the minor harm arising from Green Belt development is more than outweighed by the benefits that will be generated. I hope therefore that your Council is able to offer general support for this proposal so that the School can move forward to develop and expand.

Please do not hesitate to contact either myself or I should you wish to discuss this letter further.

Yours sincerely