Independent Schools Queensland
choice & diversity

Independent Schools Infrastructure: Planning to maintain choice

RESEARCH PAPER
October 2019

A. B. Paterson College

CONTENTS

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OUR SCHOOLS – OUR FUTURE

Our Schools – Our Future is an Independent Schools Queensland (ISQ) research-based initiative designed to promote informed public policy debate about schooling. Through commissioned and internal research, Our Schools – Our Future explores trends and issues in key areas which determine the nature and performance of our school education systems. While the initiative has a particular focus on the contribution of independent schools to our education provision and outcomes, it examines a range of issues and trends relevant to the development and implementation of effective public policy for schooling. All research reports are available to members on the Independent Schools Queensland website.

www.isq.qld.edu.au

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This report is an update on the 2017 *Independent Schools Infrastructure: Planning to Maintain Choice* research paper

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Foreword

Independent schools are an important part of Queensland's tripartite education landscape which is made up of state, Catholic and independent schools. Maintaining school choice for parents through a healthy and growing independent schooling sector is a priority for Independent Schools Queensland (ISQ).

New independent schools take years to plan and construct and require a significant up-front capital investment. That is why the adequate and timely provision of future school infrastructure is an ongoing area of advocacy for ISQ to accommodate the projected growth of school-aged children.

This latest research paper, undertaken by ISQ as part of the Our Schools – Our Future flagship program, builds on an earlier report released in 2017. While the data period (2016–2036) and the number of schools required has not changed, the costs, areas of growth and student projections have. This paper puts the cost of accommodating an additional 41,000 students in the independent school sector at $1.25 billion over this period, compared to $1.2 billion for the same number of P–12 independent schools (21) forecast in the earlier paper.

The 21 new independent schools (two stream primary and three stream secondary approximately 925 students) and associated infrastructure estimated to meet population demand and maintain parental choice is significant and prohibitive.

ISQ and the independent schooling sector thank the Australian and Queensland governments for their capital assistance. However, greater public funding, a more coordinated approach to future school planning and innovative financing arrangements, especially in regards to access to land, need to be investigated and acted upon. The independent schooling sector and governments will need to work together on this important area of public infrastructure planning for the benefit of all children.

I commend *Independent Schools Infrastructure: Planning to Maintain Choice – 2019 Update* to member schools, governments and educationalists in the interests of promoting informed public policy debate on Australian schooling.

DAVID ROBERTSON
EXECUTIVE DIRECTOR
INDEPENDENT SCHOOLS QUEENSLAND

Independent schools infrastructure needed by 2036 to maintain parental choice

with updated 2019 data

229,000

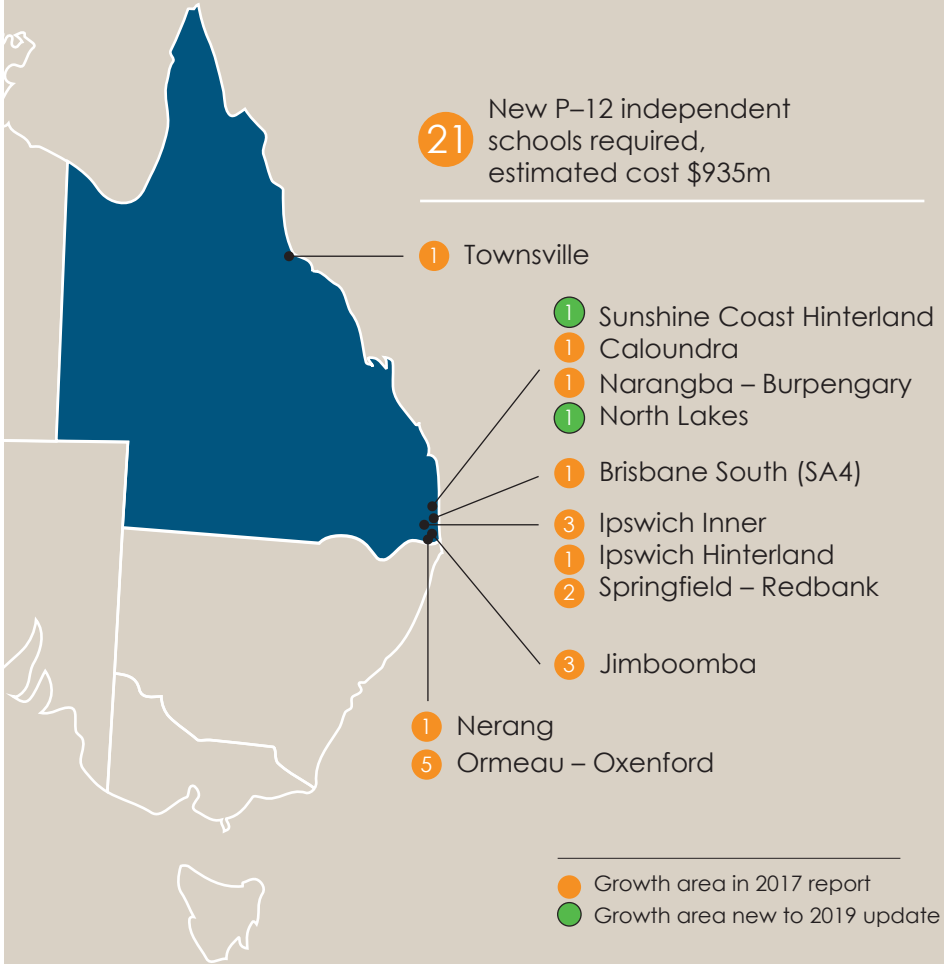
more school aged children living in Queensland

GROWTH IN STUDENT POPULATION

41,000 catered for by the independent schooling sector

16,800 primary school students

24,200 secondary school students



INFRASTRUCTURE AND COST IMPLICATIONS

21

new P–12 schools

74

additional streams in existing schools

= 622 classrooms

$1.25b

total estimated cost

Executive Summary

The research undertaken by Independent Schools Queensland (ISQ) to present the findings in this 2019 report provides a conservative perspective on the quality and estimated costs of new independent schools, and additional school capacity that will be required to maintain current levels of participation in independent schooling over the 20-year period from 2016–2036. The research is based on specific area analysis that gives indications of both the location and timing for the required additional independent school capacity.

This report is an update on the 2017 *Independent Schools Infrastructure: Planning to Maintain Choice* research paper and uses the latest data: 2016 boundaries (compared to 2011), school-age projection data released by the government in 2018 and updated facility standards released by Queensland Independent Schools Block Grant Authority (QIS BGA) in 2018 which have cost implications.

The Australian and Queensland Governments are key partners with the independent school sector in the development and provision of significant school infrastructure. Annual government allocations of capital assistance, in the form of capital grants, have been critical for the sector to develop and maintain school facilities

The strategic intent of governments that non-state school providers contribute to the delivery of community facilities such as schools, will need to be bolstered by not prohibiting the use of capital grants for land acquisitions, which is currently the case for Queensland Government capital funding.

ISQ continues to call for a new, long-term capital assistance fund to be established to support new non-state schools and additional capacity in existing schools to service high growth areas. As this latest research report shows, the longer it takes to act on this issue, the higher the cost. The highest costs are projected for the first 10 years (2016–2026) of the 20-year period, of which three years have already passed without much-needed additional funding.

Demand

Based on a "typical" independent school of two streams of primary and three streams of secondary, about 925 students, the research quantifies the need for an additional 21 new schools plus 31 additional primary streams and 43 additional secondary streams in existing schools (the equivalent of 622 classrooms constructed in existing schools).

This level of need is not dissimilar to the previous report released in 2017, when 21 new schools were also identified as required to maintain levels of parental choice for independent schooling. However, there has been a reduction in the number of additional streams required in primary and secondary schooling since the 2017 edition, when 47 additional primary streams and 59 additional secondary streams were indicated as necessary within existing schools. This reduction reflects differences between school-aged population projections which underpin assessments of need used in this report and the 2017 report findings.

Changes in the two years between reports

KEY AREAS	2017 REPORT	**2019 REPORT**
P–12 schools	21	**21**
Statistical areas[1]	10	**12**
Additional school-aged children[2]	263,000	**229,000**
– catered for by the independent sector	46,600	**41,000**
Additional streams[2]	106	**74**
– equivalent classrooms[2]	825	**622**
Total estimated cost[2]	$1.20b	**$1.25b**

1 Two new areas for new schools have been identified – North Lakes & Sunshine Coast Hinterland (see case studies).
2 Despite a reduction in the projected number of school-aged children, streams and classrooms, building costs have increased and facility standards have changed requiring more expensive specialist learning areas.

Grace Lutheran College

Ipswich Girls' Grammar School

Cost

The independent school sector makes a significant contribution to building social infrastructure with around 80% of capital costs met by parents. Additional government financial assistance is critical.

The conservative cost estimate to deliver this additional infrastructure is $1.25 billion, based on current dollar values. This equates to $62.5 million per year for the 20-year period from 2016–2036. This amount is higher than the amount identified in the 2017 report ($1.2 billion), despite a reduction in the number of primary and secondary streams required as identified in the 2019 report compared with the 2017 report. However, in the interim period, from 2017 to 2019, building costs have increased, while facility standards used by the Queensland Independent Schools Block Grant Authority (QIS BGA) to assess applications for government funding have been updated to more closely reflect facility requirements associated with current curriculum offerings, including Science, Technology, Engineering and Mathematics (STEM), and changing pedagogy. The resultant effect is one where capital costs have increased to a level which offsets lower levels of growth indicated by the latest edition of school-aged population projections.

The additional cost of $1.25 billion relates only to the cost of providing the required facilities for additional enrolments. Independent schools will also need to invest in the refurbishment, upgrade and improvement of current facilities, as well as providing facilities for newly emerging curriculum requirements such as STEM.

The Queensland independent schooling sector currently expends approximately $330 million per annum on capital facilities (including boarding provision). The majority of this expenditure is in existing schools where communities of support are already established. Governments currently provide approximately $42 million of this in the form of capital assistance ($18 million from the Australian Government and $24 million from the Queensland Government) with the remaining amount of nearly $300 million financed by parents, funding and borrowings. The $1.25 billion required in additional expenditure over existing levels will be a significant barrier for the sector in providing the required facilities.

The independent schooling sector is seeking:

The allocation of an additional $20 million per year in capital assistance from the Queensland Government to help meet the approximately $62.5 million per year required for projected additional infrastructure.

This would greatly assist the sector, which will need to provide the balance of an additional $42.5 million per year, to meet this significant increase in demand and maintain choice.

Queensland Government consideration of other mechanisms to facilitate new independent schools in high growth areas including interest subsidies on borrowing to develop new schools, loan guarantees, and increased subsidies for external infrastructure charges associated with the development of new schools.

Hillcrest Christian College

Saint Stephen's College

Planning/Land

More attention on public policy settings in relation to planning is required. Queensland's new planning regime, commenced in July 2017, clearly places non-state schools within the ambit of the state's strategic interests. The State Planning Policy (SPP) articulates the state's interests in planning matters. In relation to the state interest of livable communities, the SPP states the strategic intent as "community facilities and services, including education facilities (state and non-state providers)… are well-located, cost-effective and multi-functional" (Queensland Government, 2017, p. 26).

Planning instruments, including all local government planning schemes, priority development area masterplans, and other related instruments, are required to be consistent with the state's interests as articulated in the SPP.

Land use planning needs to ensure an adequate supply of suitably zoned sites to promote the timely, cost-effective build of well located state and non-state schools. Inadequate access to such sites is a significant restraining factor on infrastructure investment by the independent school sector.

The independent schooling sector is seeking:

Timely access to suitable school sites that are well located and affordable. State and local planning of additional schools through planning instruments that fully recognise and make provision for non-state school providers, alongside the state government.

Allocation of available land by the Queensland Government in areas of high growth for independent schools.

Alternatively, negotiation by the Queensland Government with developers for the allocation of suitable land in priority development areas at reasonable costs.

Report Context

Continued growth in Queensland's school-aged population creates a significant challenge for all schooling sectors. Data from the latest Australian Bureau of Statistics (ABS) Census of Population and Housing (2016 Census) indicates the number of school-aged students in the state increased by more than 60,300 or 9% in the five-year period from 2011–2016. This reflects an average annual increase of 1.8% each year.

Latest school-age projections for Queensland, developed by the Queensland Government Statistician's Office and based on the most-likely "medium" series projections, suggest that in the 20 years from 2016–2036 the number of school-aged children will increase by 28% or approximately 228,600 school-aged children (24% increase in primary school-aged children and 33% increase in secondary school-aged children). Projections suggest higher growth will occur in the 10-year period from 2016–2026, with the number of school-aged children increasing at an average annual rate of 1.4% compared to a rate of 1.1% per annum in the following 10-year period from 2026–2036.

Projected growth in the school-aged population has significant resourcing implications for education providers – the Queensland Government, as well as the Catholic and independent schooling sectors. Additional quality staff will need to be trained and employed. Higher recurrent costs to government, i.e. the taxpayer, would result from higher proportions of projected growth attending the government sector, owing to state schools receiving higher government funding levels than students in non-state (Catholic and independent) schools.

The distribution of additional students amongst the three schooling sectors will undoubtedly be influenced by parental choice, however, the ability of parents to exercise choice will also be influenced by whether sufficient capacity exists in schools in those areas where the school-aged population will increase in the future. Ensuring sufficient educational facilities, of types aligned with parental choice patterns, will be needed if the level of parental choice in Queensland is not to be eroded in the future.

Within this context, this report endeavours to:

- Quantify the level of additional independent school facilities that will be required to cater for projected growth, while maintaining current levels of parental choice.
- Identify where these additional facilities are likely to be required and quantify the capital costs associated with parental choice levels being maintained.

Report Structure

This report is an update of a previous report undertaken in 2017, which was based on boundaries associated with the 2011 Census of Population and Housing and projections prepared by government prior to the release of the 2016 Census of Population and Housing. This report is based on 2016 boundaries and school-age projection data released by the Queensland Government in 2018. It also incorporates construction costs as at 2019, and updated facility standards released by QIS BGA in 2018.

The report structure mirrors that of the earlier report, being divided into two sections.

The first section provides an overview of the methodology used to quantify and estimate capital costs, and the complexities associated with determining capital needs. This section also provides a statewide perspective of likely capital works requirements associated with the level of parental choice for independent schooling being maintained over the 20-year period from 2016-2036.

The second section of this report is focused on identifying where, in Queensland, additional independent school facilities are most likely to be required, and the quantum of capital works required if the level of parental choice for independent schools is maintained. Those areas identified as requiring the highest number of additional facilities, if parental choice is not to be eroded, are examined in greatest detail.

Methodology Overview

Determining Additional Demand for Independent Schooling

The following methodology and assumptions were applied to determine the number of additional facilities required to cater for students attending independent schools through to 2036:

- Queensland Government projections for primary and secondary school-aged population (2018 edition) informed the basis of student population. This is the most recent dataset available. This data is reported at the 2016 Statistical Area 2 level (SA2), based on data from the 2016 Census. The 20-year period, from 2016–2036, is the focus of this report.
- To estimate the number of students that would be expected to attend independent schools, the respective proportion of primary students and secondary students attending independent schools reported in the 2016 Census was applied to projections for primary and secondary school-aged children. These proportions were considered to provide a measure of the level of choice available to, and supported by, parents in each SA2.
- To quantify additional demand for places at independent schools over the period 2016–2036, the number of anticipated independent school students in 2016, based on the 2016 Census participation rates in independent schooling, was used as the base population for independent school students. This base population was compared to projected demand for independent school places in subsequent Census years, enabling additional demand for each five-year period from 2016–2021, 2021–2026, 2026–2031 and 2031–2036, along with the overall level of additional demand for the 20-year period from 2016–2036 to be determined.
- Historically, enrolment growth occurring in the independent school sector has been a product of growth in the school-aged population in Queensland, combined with an increasing proportion of parents choosing an independent school education for their children. Demand for future places at independent schools in this study is limited to assessing the impact of growth in the school-aged population. No cognisance has been made of possible changes in the proportion of students that may attend independent schools in the future. It is possible, particularly in areas where new schools are established, that higher proportions of students would attend independent schools generating higher demand.

Determining Additional Facilities Required to Cater for Additional Students Attending Independent Schooling

To estimate the number, type, and timing of new facilities to be constructed to cater for additional demand, the focus is on determining the number of additional students that would be in Prep and Year 7. This focus reflects the operating structure of independent schools and financial viability considerations for independent schools. Unlike state schools where the number of students in any year level is not limited, potentially resulting in a class operating with a small number of students, independent schools impose a limit on the number of classes operated at each year level, with the number of students in each class limited. A new class is not provided unless sufficient students exist to fill the class. When sufficient demand exists to warrant an additional class being offered, the school would increase the number of classes in the first year of schooling, i.e. Prep in the case of primary schooling or Year 7 in secondary schooling. The addition of another class, or stream, in Prep or Year 7 initially, will then progress through subsequent years, requiring ultimately spaces to cater for an additional class of students in each year level in primary and/ or secondary.

The focus on determining the viability of an additional Prep and Year 7, reflecting an additional primary or secondary stream being viable, also mitigates any issues quantifying costs associated with schools that may offer additional streams in mid-intake years i.e. a number of independent schools increase streams in Year 4 or Year 5, assuming an additional stream in Prep is viable therefore would cause a commensurate increase in streams when this Prep cohort would reach Year 4 or Year 5 as the case may be. It also resolves the issue surrounding lower retention rates in upper secondary school year levels, given government projections refer to "school-aged" as the number of children aged 5–17.

To determine if an additional Prep or Year 7 class would be viable, it was first assumed that additional demand for primary and secondary school places were distributed equally across all year levels in primary and secondary (i.e. an additional 700 primary school students attending independent schools is assumed to reflect an additional 100 students in each year level from Prep to Year 6). In the case of Prep, it was then assumed that each class would require 25 students to be viable, and for Year 7 it was assumed that each class would require 30 students to be viable. If data indicated 3.5 classes were viable, it was assumed that only 3 classes would be required as the balance of 0.5 classes would not meet viability criteria required.

It should be noted that the number of Prep or Year 7 classes suggested under these assumptions could be considered conservative, as maximum class sizes can be lower, depending on individual school policy.

Costing Methodology

To identify capital costs associated with maintaining current parental choice patterns for independent school places in the 2016–2036 period, the number of primary streams and secondary streams, as indicated by the number of Prep classes and Year 7 classes that would be viable, were utilised in concert with other considerations pertaining to the independent schooling sector in Queensland.

New schools or existing facilities to cater for growth

It was assumed that if demand for independent schooling indicated that two streams of primary and three streams of secondary could be supported in an area, a new independent school would be established to meet need. A P–12 school of two streams of primary and three streams of secondary is the most common structure of an independent school. (In 2016, 75% of independent schools offered both primary and secondary schooling, with the average size of primary year levels equating to two streams in primary and three streams in secondary). Such a school would cater for approximately 925 students, with approximately 385 primary students across Prep to Year 6 and 540 secondary students across Year 7 to Year 12.

In those areas experiencing growth of an insufficient level to warrant a new two stream primary and three stream secondary, a new school would not be supported. Similarly, in some areas where new school provision is suggested, not all growth would be catered for by new schools (e.g. an area requiring three streams in primary and three streams in secondary would warrant one new P–12 school, with an additional stream in primary still required to be serviced). In such situations, it is assumed that existing schools would increase capacity adding additional streams to absorb this growth.

This could be considered a conservative approach, as it is possible that stand-alone primary and/or stand-alone secondary schools could be established to cater for future demand. The provision of stand-alone primary and secondary schools would significantly increase costs presented, due to duplication of many facilities that would otherwise be shared across P–12 schools.

Types of facilities required

Quantifying the number of learning spaces required to service primary and secondary were based on QIS BGA assessment criteria for capital funding, where one stream in primary is considered to require an additional eight general learning areas across Prep to Year 6, inclusive of a flexible learning area, while one stream of secondary is considered to require an additional 8.7 learning areas (inclusive of general and specialist learning areas) across Year 7 to Year 12.

In order to quantify the number and type of learning spaces required to service the secondary student component of a three-stream secondary P–12 school, an analysis was undertaken of the type and quantity of learning spaces provided in co-educational P–12 schools offering three streams of secondary. This analysis indicated that in conjunction with general learning areas, additional learning spaces were provided for curriculum areas of Science, Technologies (Design and Technology/Digital Technology, Food and fibre production/Food specialisations, Hospitality Practices, Engineering principles and systems/Materials and technologies specialisaton and Engineering Skills) and the Arts (Drama, Art and Music).

An analysis of learning spaces offered at schools offering three streams of secondary indicated that 15 general learning areas, four Technologies facilities (most commonly two Design and Technology facilities, and one facility each for Hospitality Practices and Engineering) , four learning spaces for The Arts (most commonly one space for both Drama and Art, along with two spaces for Music) and three Science labs would be required. This is a total of 26 learning spaces, which reflects 8.7 learning spaces being required per secondary stream.

School-based facilities which support education delivery, either across the primary or secondary student body, or both, were also identified. The facilities included as part of new school costs were resource centres and learning support spaces, both based on separate facilities for primary and secondary components at the school, covered areas and student amenities (including toilets, tuckshop, student locker space). An administration centre, multi-purpose centre and technology support space were also costed, with these facilities expected to service the entire school.

Costs of functional spaces

QIS BGA guidelines and area standards were used to identify floor areas (m^2) associated with each type of functional space required. These details are as indicated in the QIS BGA publication *Learning Places and Spaces: Exploring Educational Need*.

Brisbane-based costs for particular facility types (cost per m^2) and associated allowances for furniture and equipment, QIS BGA in *2019 Construction Cost and Descriptors for Functional Areas*, and *2019 Furniture, Equipment and Sundry Allowances* were applied to the assumed level of facility provision associated with a two-stream primary and three-stream secondary school. This enabled the cost of learning spaces, support facilities, and those facilities shared across the campus, to be quantified for new schools.

The average cost per stream for learning spaces alone in primary and secondary as calculated above were used to identify the cost of learning spaces associated with existing independent schools expanding capacity.

It should be emphasised, that costings based on QIS BGA standards could be considered to result in a conservative cost structure being established. In some cases, individual schools may make decisions to provide spaces above or below standards of provisions utilised by QIS BGA to determine funding received by government for capital works.

Other costs

An analysis of a number of school capital project budgets evidences a significant range of additional costs apart from building costs, relating to site characteristics and locational considerations influencing costs.

SITE DEVELOPMENT, SPECIAL SERVICES, FIRE SERVICES

An examination of projects relating to existing schools suggest an average of 30% of building costs should be allocated to cover costs associated with site development, special services and fire services. Costs associated with new school construction, not surprisingly given inclusion of what are often on-off components such as sporting ovals and parking requirements, are significantly higher than that of projects associated with an existing school. In recognition of higher costs associated with new schools, the average of 40% of building costs has been utilised to estimate these costs for new schools.

PROFESSIONAL FEES

It has been assumed that professional fees are in the order of 10% of the project costs.

EXTERNAL INFRASTRUCTURE

External infrastructure costs levied by local government authorities are difficult to estimate, with charges dependent on local government areas and site-specific factors. These costs are associated with provision of water supply, sewerage, drainage and fire service mains services as well as connection costs, alteration to transport networks in the vicinity of the school to ensure safety in the area (i.e. pick-up and set-down bays, road widening, turning lanes, traffic lights), and streetscaping considerations (i.e. pedestrian footpaths, signage, lighting).

In the case of projects at existing schools, charges may be minimal, or large. An estimate of 5% of built costs has been used when projects are at existing schools. With new school construction, charges are estimated to be in the order of 15% of building and site costs.

New school land acquisition costs

Nine hectares are anticipated to be acquired for the construction of a two-stream primary and three-stream secondary school, based on QIS BGA guidelines relating to greenfield sites.

Site cost is affected by the locational factors and land use zoning. Advice regarding recent land acquisition purchases in greenfield settings undergoing residential development suggest the land costs may reach $1 million per hectare. Other examples exist of land costs significantly lower, albeit lower costs can be suggestive of higher costs associated with site development work to ensure suitable building platforms.

For the purposes of estimating costs associated with land, acquisition of $650,000 per hectare has been used for each new P–12 school. This cost reflects the probability that new school provision is more likely to be associated with large residential developments, where land costs would be expected to be higher.

Cost Estimates

Based on the above assumptions:

New school cost estimates

The built cost of a new P–12 school catering for two streams in primary and three streams in secondary is estimated to be in the order of $38.5 million. A further $6 million is estimated to be required for acquisition of nine hectares of land for each new school.

In total, each new school is estimated to cost approximately $44.5 million.

Additional streams at existing schools

Costs associated with provision of additional facilities at existing schools expanding capacity are based on the average cost per stream indicated for primary and secondary learning facilities, and those facilities anticipated to require an increase due to higher enrolment levels being sustained at the school (student amenities and covered areas).

The learning area costs associated with one stream of primary are estimated to be in the order of $3.6 million.

Learning area costs associated with one stream of secondary are estimated to be in the order of $4.7 million.

Maintaining Parental Choice

Queensland Government Statisticians Office (QGSO) population projections outlined in *Projected school-age persons, by statistical area, Queensland, 2018* suggest the number of school-aged children will increase by more than 228,600 children over the 20 years from 2016–2036.

A higher proportion of projected growth is anticipated to occur in secondary schooling than in primary schooling, with 52% of projected growth anticipated in secondary compared to 48% of projected growth anticipated in primary.

Growth in the number of secondary school-aged children is forecast to occur at a higher rate than in primary schooling. Growth from 2016–2036 in secondary school-aged children reflects a 33% increase in the number of secondary school-aged children, while the number of primary school-aged children is expected to increase by 24%. This growth in primary school-aged children extends across seven year levels from Prep to Year 6, while growth in secondary school-aged children extends across six year levels (Year 7 to Year 12).

The distribution of growth across primary and secondary schooling is significant when considering costs of capital works. The provision of facilities to cater for secondary schooling are significantly higher than costs associated with primary schooling, owing to the need for a greater range of specialist facilities required to support the delivery of the secondary schooling curriculum.

Independent Schools

The 2016 Census indicates that in Queensland 15.6% of school students attended independent schools. If this proportion is considered indicative of the level of parental choice for independent schooling supported by the community, it could be assumed that independent schools would need to cater for an 15.6% of projected growth over the 2016–2036 period if parental choice levels are to be maintained. This would translate to independent schools being required to cater for approximately 35,700 additional students – 17,100 additional students in primary and 18,600 additional students in secondary.

Figure 1: Participation in Schooling, 2016 Census of Population and Housing

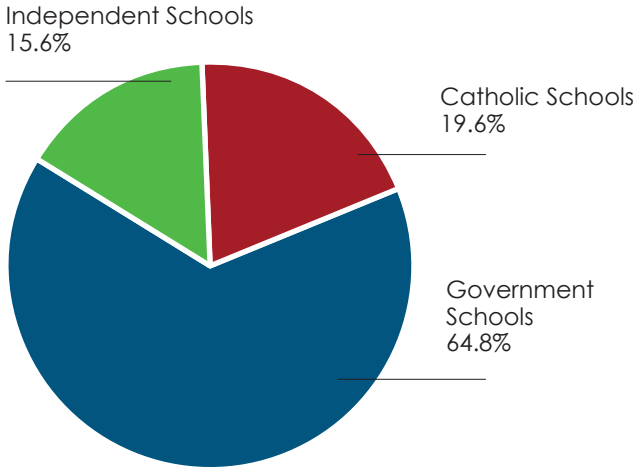


Figure 2: Participation in Primary Schooling, 2016 Census of Population and Housing

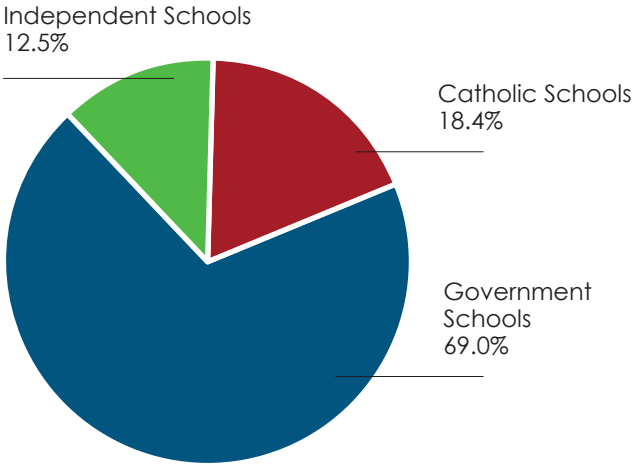
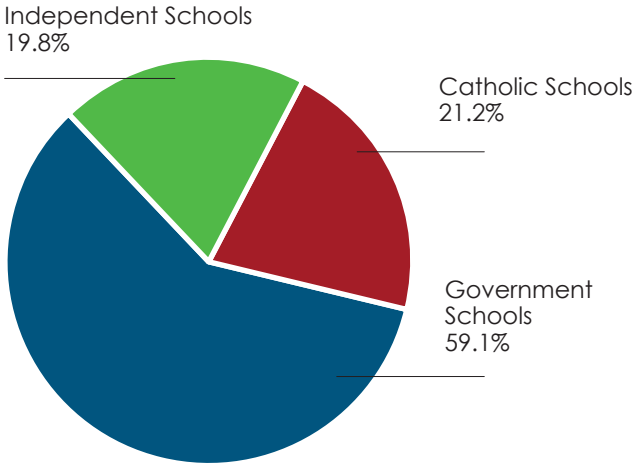


Figure 3: Participation in Secondary Schooling, 2016 Census of Population and Housing



Source: Australian Bureau of Statistics. (2016).

Figure 4: Australian Standard Geographical Classification SA4–SA2

Statistical Area Level 4

- Largest sub-State regions in the Main Structure of the ASGS. A minimum of 100,000 persons was set for the SA4s, although there are some exceptions to this.
- In regional areas, SA4s tend to have populations closer to the minimum (100,000 – 300,000). In metropolitan areas, the SA4s tend to have larger populations (300,000 – 500,000).

Statistical Area Level 3

- Generally have a population of between 30,000 and 130,000 people. In major cities represent the area serviced by a major transport and commercial hub. They often closely align to large urban local government areas.
- In regional areas, they represent the area serviced by regional cities with a population over 20,000 people.

Statistical Area Level 2

- Average population of about 10,000, with a minimum population of 3,000 and a maximum of 25,000.
- In urban areas SA2s largely conform to suburbs or combinations of suburbs, while in rural areas they define functional zones of social and economic links.

Source: Queensland Government. (2016).

The 2016 Census indicates that independent schools cater for 12.5% of primary school students and 19.8% of secondary school students (refer Figure 2 and Figure 3). On this basis, to maintain parental choice, independent schools would need to cater for an additional 37,200 students – 5,300 less than indicated in the 2017 report – comprised of an additional 13,700 primary students and 23,500 secondary students (i.e. 37% of students in primary and 63% of students in secondary). Owing to the differential between costs of primary school facilities and secondary school facilities, the higher level of growth expected in secondary school places is significant. However, this too is simplistic.

Complexities in Assessing and Quantifying Need

School facilities generally cannot be relocated to where children are located. Projections for school-aged populations at the state level represent a "net" effect of growth and decline. In some locations, the school-aged population will decline, potentially resulting in under-utilised education facilities in these areas. In other areas, the school-aged population will increase, reflecting new families moving into areas and/or higher birth rates, resulting in an increase in need for new education facilities.

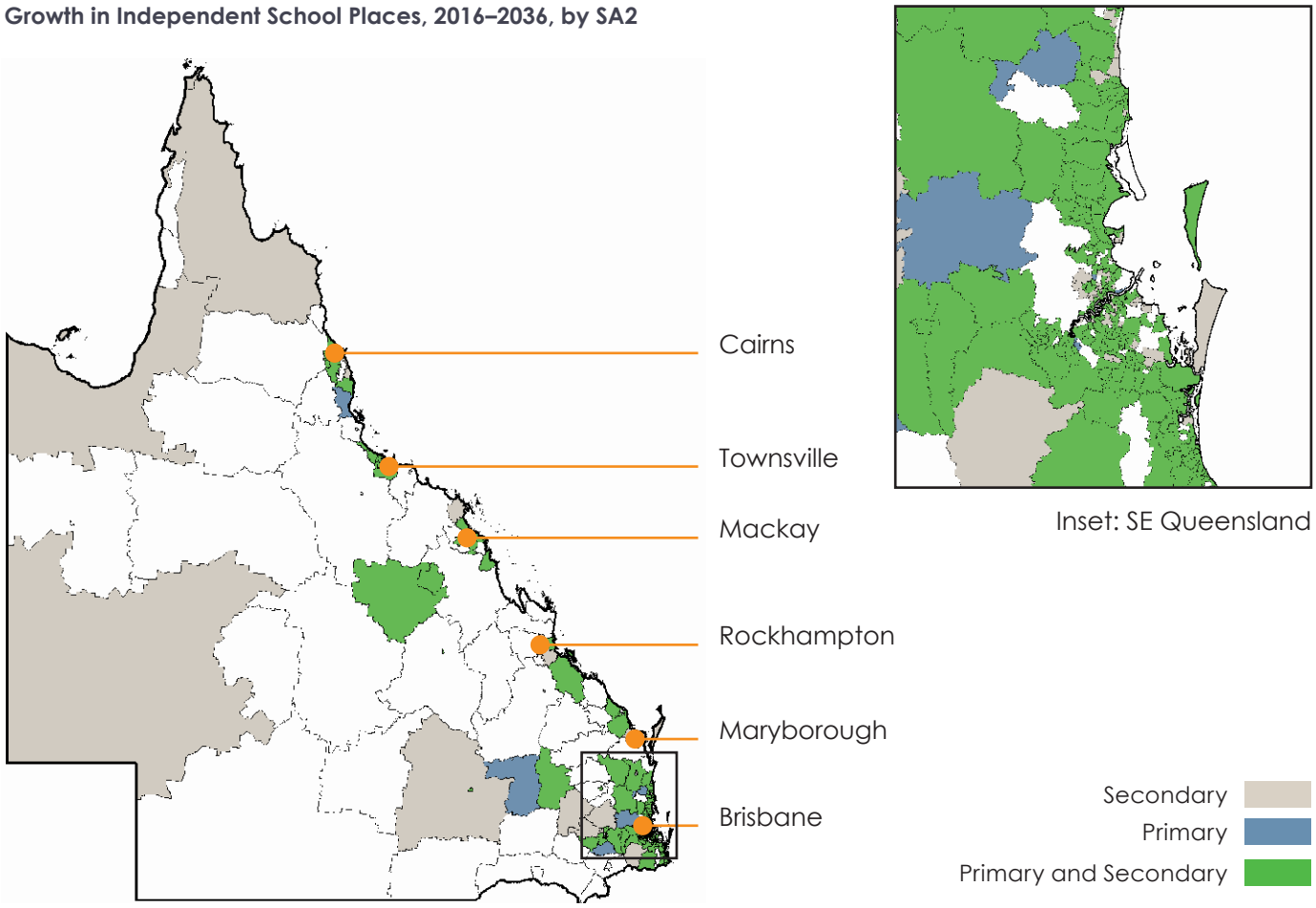
Similarly, the statewide participation rate in independent schooling reflects a net effect. In some areas, where no independent schools are located, no students will be attending independent schools. In other areas, where parents have access to a range of independent schools, higher proportions of parents may choose independent schooling.

Fortunately, school-aged population projections have been undertaken at the Statistical Area Level 2 (SA2) level (refer Figure 4). This enables anticipated trends in primary and secondary school-aged populations and the potential impact on independent schooling to be examined at a more localised level.

Based on independent schools continuing to cater for the same proportion of primary and secondary students residing in each SA2 as evidenced in the 2016 Census, of projected numbers of school-aged children over the 2016–2036 period, independent schools would need to cater for additional primary students in 308 of 528 SA2s within Queensland (58% of SA2s), and additional secondary school students in 378 of the 528 SA2s (72% of SA2s). Most of those SA2s required to cater for additional primary students attending independent schools would also be required to cater for additional secondary school students, with 296 SA2s expected to experience increases in both primary and secondary student numbers (refer Map 1).

MAP 1:

Growth in Independent School Places, 2016–2036, by SA2



Decline in primary student demand over the 2016–2036 period would occur in 196 SA2s (37% of SA2s), while demand would remain static in 24 SA2s (5% of SA2s). Similarly, in respect to secondary school students, a reduction in the number of secondary student numbers would be anticipated in 132 SA2s (25% of SA2s), while stability would be expected in 18 SA2s (5% of SA2s).

Of those 308 SA2s expected to cater for increases in primary, when aggregated together, projected growth in the school-aged population over the 2016–2036 period, and maintenance of the current level of choice evidenced in SA2s, would result in, approximately, 18,400 additional primary students accessing independent schooling. Similarly, on the same basis, increases in secondary student demand in those 378 SA2s anticipated to experience increases in demand would result in 25,600 additional secondary students accessing independent schooling.

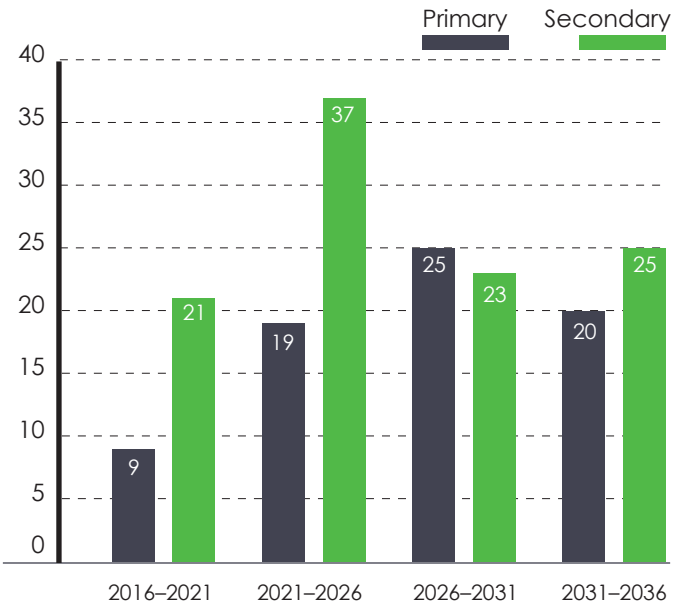
Independent schools however have larger catchment areas than an individual SA2. In metropolitan and regional centres, it is common for catchment areas to extend over many SA2s. It is for this reason that considerations of independent school catchment areas need to overlay projections of the school-aged population.

In recognition of the size of independent school catchment areas, it is considered more appropriate in most cases, to utilise Statistical Areas Level 3 (SA3s) boundaries to quantify future growth in independent school demand and associated costs. SA3s are often the functional areas of regional towns and cities, or clusters of related suburbs around urban commercial and transport hubs within the major urban areas. They are built from aggregations of SA2s, enabling need for future independent school places at the SA2 level to be combined to determine need at the SA3 level.

There are 82 SA3s within Queensland. Aggregation of SA2 data to the SA3 level indicates 64 of these 82 SA3s would experience net growth in the number of primary students that would access independent schooling, assuming current levels of parental choice were maintained over the 2016–2036 period. In the case of secondary schooling, 68 SA3s would experience net growth in the number of secondary students that would access independent schooling.

There are a small number of areas where SA3 boundaries are not considered the optimum area for estimated future demand for capital works associated with parental choice being maintained in the future. This occurs in areas where the SA3 covers a relatively small area, areas where it would be anticipated that a school located in the SA3 would be expected to cater for other surrounding SA3s. This situation is present within inner Brisbane City areas. To acknowledge this situation, a number of inner Brisbane City areas SA3s have been aggregated to the SA4 level (refer Figure 4).

Figure 5: Number of Additional Primary and Secondary Streams Required, by Timeframe



As a result of aggregating SA3s within Brisbane City, the number of geographical areas considered in this report totals 66, reflecting five SA4s and 61 SA3s. These areas are "quasi" catchment areas for the purposes of this study, which is aimed at quantifying likely future capital costs and identifying locations where growth is anticipated to occur in the independent school sector in future years. In practice, decisions to establish additional facilities and/or schools would be expected to be subject to detailed demographic and socio-economic analysis which would take into account actual catchment areas of schools, which may extend over sections of different areas utilised in this report, or be focused on specific areas within an area used in the report.

A further factor adds an additional layer of complexity when endeavouring to quantify future facility provision needs in the independent school sector. Unlike government schools, where there is a need to cater for all students in an area that wish to attend a school and provide the associated facilities, independent schools have the capacity to limit their enrolment size. In this regard, independent schools strive to ensure classes are full, maximising cost-effectiveness. Each school tends to offer a number of streams in primary and/ or secondary year levels, representing the number of classes the school will offer in each year level, i.e. a one stream Prep to Year 6 primary school would reflect the school enrolling one class of Prep each year, with this stream of students flowing through the school over successive years from Prep to Year 6. The maximum number of students enrolled in each class at each year level will be determined by the individual school, taking into account the school's educational philosophy and operating considerations.

To acknowledge the ability of independent schools to limit the number of streams offered, and associated maximum class sizes, the number of additional primary and secondary students projected to be catered for by independent schools from 2016–2036 was converted to reflect the number of additional full streams of students that would be supported in each geographical area being assessed. For example, if three and a half streams were indicated as being supported the number of streams upon which costs were quantified would be three streams. Each stream for primary and secondary was based on Prep class sizes of 25 students and Year 7 class sizes of 30 students. These are the maximum class sizes operated in the State schooling sector.

It is acknowledged that truncating the number of streams offered, and estimating class sizes on the basis of class sizes being larger than what is operated by many independent schools, results in reducing the number of facilities that would be required by the independent sector. It is considered more prudent however to take this approach. Fundamentally the balance of students that would not sustain a full stream in an area would be unlikely to be serviced by an independent school, until such time that a full-stream was sustainable.

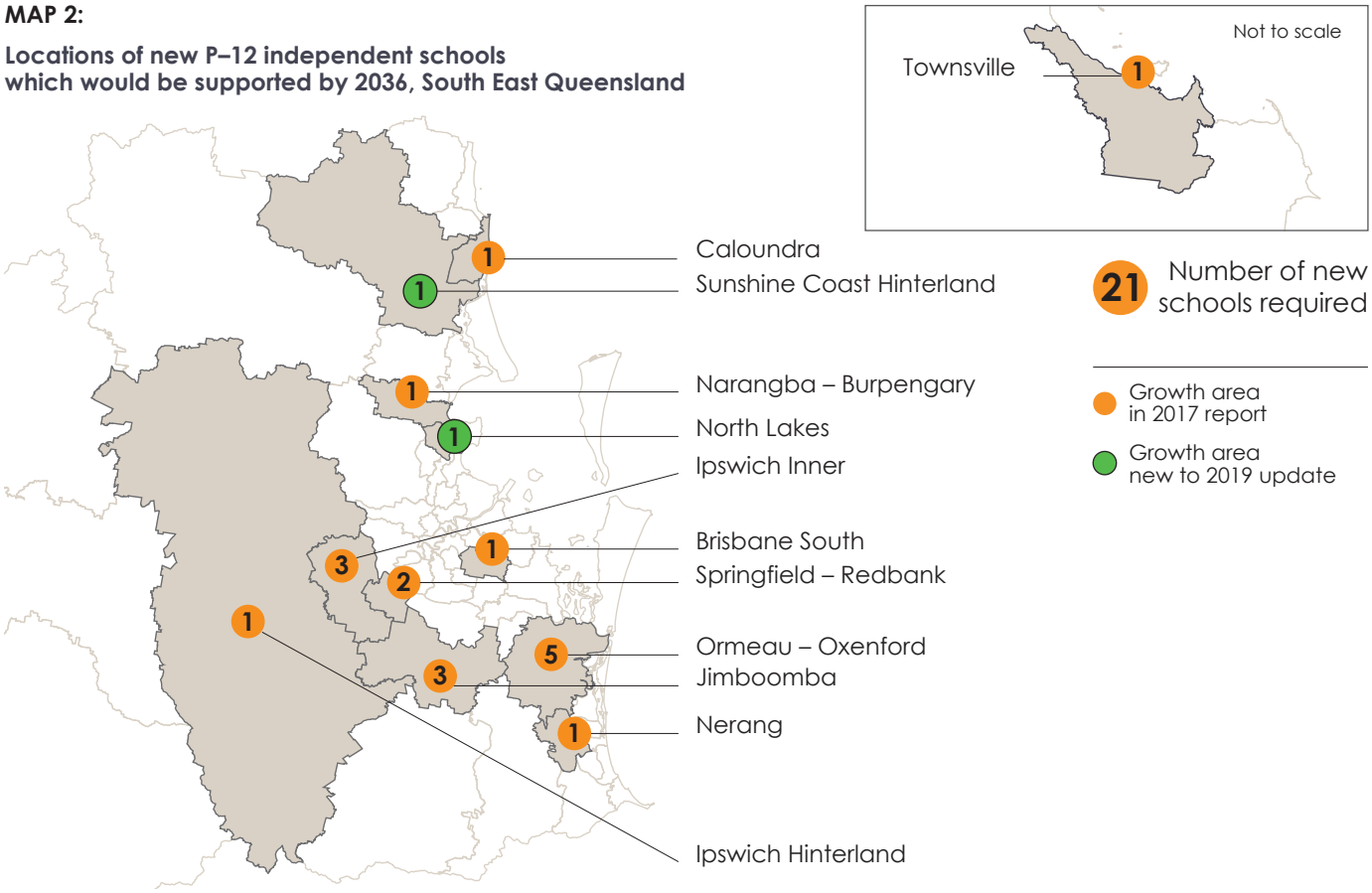
The use of maximum class sizes as operated by the State schooling sector also assists in ensuring capital costs developed are not inflated due to individual school-choice decisions.

Table 1: Total Additional Streams Required

STATISTICAL AREA (SA3 UNLESS INDICATED)	PRIMARY STREAMS	SECONDARY STREAMS
Beaudesert		1
Beenleigh	1	1
Brisbane – East (SA4)		1
Brisbane – North (SA4)		1
Brisbane – South (SA4)	3	6
Brisbane – West (SA4)		1
Brisbane Inner City (SA4)	1	9
Broadbeach – Burleigh	1	2
Browns Plains	2	2
Caboolture	2	2
Caloundra	4	5
Coolangatta		1
Gold Coast – North		1
Ipswich Hinterland	2	5
Ipswich Inner	10	9
Jimboomba	8	9
Mudgeeraba – Tallebudgera		1
Nambour		1
Narangba – Burpengary	3	3
Nerang	2	3
North Lakes	3	4
Ormeau – Oxenford	14	15
Robina		1
Rockhampton		1
Southport		2
Springfield – Redbank	10	8
Sunshine Coast Hinterland	3	3
Surfers Paradise	1	2
The Hills District		1
Toowoomba		1
Townsville	3	4

MAP 2:

Locations of new P–12 independent schools which would be supported by 2036, South East Queensland



Additional Streams Required

Of the 66 geographical areas (61 SA3s and 5 SA4s) considered, based on government projections and 2016 participation rates in independent schooling, over the 2016–2036 period 16 areas would experience a reduction in independent school primary student numbers, albeit no area would be expected to experience reductions of over 90 primary students from Prep to Year 6 over the 20-year timeframe. Eleven areas would experience a reduction in independent school secondary student numbers, with no area experiencing a reduction of more than 25 secondary students across Year 7 to Year 12. Such decline is minimal.

Ten of the 11 of the areas expected to experience a reduction in secondary are also expected to experience reductions in primary numbers (SA3s of Biloela, Burnett, Central Highlands, Charters Towers – Ayr – Ingham, Far North, Gold Coast Hinterland, Granite Belt, Maryborough, Outback – North and Outback – South)). The six areas expected to experience reductions in only primary student numbers are Brisbane – West and Brisbane – East SA4s and SA3s of Bribie – Beachmere, Darling Downs – East, Gympie – Cooloola and Innisfail – Cassowary Coast.

A further 20 areas are anticipated to experience an increase in independent school primary and secondary student numbers over the 2016–2036 period, however, the level of increase would be insufficient to warrant additional streams in primary or secondary schooling being offered at independent schools. These areas are the SA3s of Bowen Basin – North, Buderim, Bundaberg, Caboolture Hinterland, Cairns – North, Cairns – South, Forest Lake – Oxley, Gladstone, Hervey Bay, Loganlea – Carbrook, Mackay, Maroochy, Noosa, Noosa Hinterland, Port Douglas – Daintree, Redcliffe, Springwood – Kingston, Strathpine, Tablelands (East) – Kuranda and Whitsunday.

Similarly, in another 12 areas indicated as experiencing growth in primary and four areas indicated as experiencing growth in secondary, growth was not sufficient to warrant an additional stream of primary or secondary, respectively, being provided.

Thirty-one areas however would be expected to experience sufficient growth in independent school student numbers over the 2016–2036 period to warrant additional streams in primary and/or secondary schooling (refer Table 1). Together, over the 20-year period, these areas are indicated as being able to support an additional 73 streams in primary and 106 streams in secondary.

The number of primary and secondary streams required in each intercensal period (five-year period between each national population census) increases over time in primary through to the 2026–2031 period, while highest growth in secondary is expected in the 2021–2026 period (refer Figure 5).

School-age population projections and current participation rates in independent schooling indicates only nine additional primary streams would be sustained by 2021, due to growth in the 2016–2021 period. A further 19 primary streams would be supported as a result of growth in the 2021–2026 period, 25 more primary streams in the 2026–2031 period, followed by another 20 primary streams in the 2031–2036 period.

More streams will be required in secondary than primary in each intercensal period, with an additional 21 streams

suggested as being required as a result of growth in the 2016– 2021 period, increasing to 37 more streams in the 2021–2026 period before decreasing to 23 streams in the 2026–2031 period and 25 streams in the 2031–2036 period.

Of these 31 areas, 13 areas are expected to cater for an additional stream only in secondary (Brisbane – East, Brisbane – North and Brisbane – West SA4s, and SA3s of Coolangatta, Gold Coast – North, Mudgeeraba – Tallebudgera, Nambour, Robina, Rockhampton, Southport, The Hills District and Toowoomba).

The balance of 18 areas are all expected to support additional streams in both primary and secondary, all but one of these areas are located in South East Queensland (refer Table 1). The area where greatest future demand would be required is within the SA3 of Oxenford – Ormeau SA3, where an additional 14 streams in primary and 15 streams in secondary are indicated as being supported. Next highest demand for additional streams is indicated in Ipswich Inner SA3 where 10 primary and nine secondary streams are suggested, followed by Springfield – Redbank SA3 with 10 primary and eight secondary streams estimated as being required, Jimboomba SA3 with eight primary streams and nine secondary streams suggested and Brisbane – Inner City SA4 only one primary but nine secondary streams are indicated as being supported by 2036.

New Schools or Existing Facilities

Circumstances as to whether existing schools or new schools will be established, or a combination of both will cater for additional streams is a matter of conjecture. It will ultimately depend on a range of factors. In some areas, existing schools may increase their capacity to cater for additional demand. However, some existing independent schools may not be well-located within the area to cater for projected growth, precluding expansion, or an existing school may be well-located to cater for growth but have insufficient land available (or suitable) to allow an expansion in capacity. Equally, some schools may be comfortable operating at their current enrolment level. Whether new schools are established will also be dependent on a community decision to commence a new school, the ability of the community to access funding to support and service debt levels associated with the establishment of a new school, as well as whether suitable land for acquisition is available.

For purposes of quantifying capital costs associated with additional streams being required it was assumed that new P–12 schools would be established in areas where a two-stream primary school and three-stream secondary school would be supported. This is the dominant model operated by independent schools in Queensland. If all streams projected to be required in an area would not be supported with a new school model, these additional streams are assumed to be catered for within existing facilities.

New schools

Of the 31 areas where additional demand for independent school places are indicated as warranting an additional stream being offered in primary, secondary or both, only 12 areas would support at least one new P–12 independent school catering for two streams in primary and three streams in secondary. In total 21 new P–12 schools would be supported, with all of these schools, except for one in South East Queensland (refer Map 2).

Table 2: Additional Streams Required in Existing Schools

STATISTICAL AREA (SA3 UNLESS INDICATED)	PRIMARY STREAMS	SECONDARY STREAMS
Beaudesert		1
Beenleigh	1	1
Brisbane – East (SA4)		1
Brisbane – North (SA4)		1
Brisbane – South (SA4)	1	3
Brisbane – West (SA4)		1
Brisbane Inner City (SA4)	1	9
Broadbeach – Burleigh	1	2
Browns Plains	2	2
Caboolture	2	2
Caloundra	2	2
Coolangatta		1
Gold Coast – North		1
Ipswich Hinterland		2
Ipswich Inner	4	
Jimboomba	2	
Mudgeeraba – Tallebudgera		1
Nambour		1
Narangba – Burpengary	1	
North Lakes	1	1
Ormeau – Oxenford	4	
Robina		1
Rockhampton		1
Southport		2
Springfield – Redbank	6	2
Sunshine Coast Hinterland	1	
Surfers Paradise	1	2
The Hills District		1
Toowoomba		1
Townsville	1	1

It should be noted that since the 2017 report the statistical boundaries have changed and two new growth areas have been identified; North Lakes and Sunshine Coast Hinterland. These statistical areas have been identified as requiring a new P–12 independent school by 2036. Latest data indicates Caloundra and Townsville will only require one new P–12 independent school, compared to two each as identified in the 2017 report.

Together the 21 new schools would cater for 42 of the 73 streams in primary and 63 of 106 streams in secondary that are anticipated to be required by 2036 in the independent school sector, if parental choice levels are to be maintained (58% and 59% of total need in primary and secondary, respectively).

The highest number of new schools would be supported in Ormeau – Oxenford with the SA3 expected to support an additional five P–12 independent schools by 2036. Next highest numbers of new schools are expected to be in Ipswich Inner and Jimboomba SA3s where an additional three

P–12 independent schools are expected to be supported by 2036, followed by one P–12 independent school being supported in the same timeframe in Springfield – Redbank SA3. One new independent school would be supported in Townsville, Caloundra, Sunshine Coast Hinterland, Narangba – Burpengary, Ipswich Hinterland and North Lakes, Nerang SA3s, and Brisbane – South SA4.

Existing schools

The balance of streams required by 2036, 31 primary streams and 43 secondary streams, are assumed to be catered for in existing schools (or by new schools identified increasing the number of streams offered). It is always possible that decisions may be made in some of these areas to establish new schools (i.e. stand-alone primary and/or secondary schools). However, this category of future need reflects areas where, on the basis of projections, additional P–12 two stream primary and three stream secondary schools would not be sustained. Accordingly, for costing purposes, it has been assumed that these streams will be catered for within existing schools, a least costly option than new school provision.

Existing independent schools are assumed to cater for additional streams in 30 of the 66 study areas (refer Table 2). As was the case when modelling new school locations, the majority of these areas are within South East Queensland, with 27 of the 30 areas indicated as having sufficient demand to warrant servicing additional streams in primary and secondary being located in South East Queensland. The locations outside of South East Queensland where additional streams are indicated as being required to be serviced by existing schools are in SA3s of Rockhampton, Toowoomba and Townsville (refer Table 2).

Five areas, Ormeau – Oxenford, Ipswich Inner, Jimboomba, Narangba – Burpengary and Sunshine Coast Hinterland SA3s, are indicated as being able to sustain only an additional stream in primary. Each of these areas are indicated as also being areas where new schools would be supported.

Another 12 areas are indicated as only sustaining one additional stream in secondary (SA3s of Rockhampton, Coolangatta, Gold Coast – North, Mudgeeraba – Tallebudgera, Robina, Beaudesert, The Hills District, Nambour and Toowoomba and SA4s of Brisbane – East, Brisbane – North and Brisbane – West).

Four areas are anticipated to cater for at least two streams of primary within existing schools (Browns Plains, Caboolture, Caloundra and Springfield – Redbank SA3s). Both Caloundra and Springfield – Redbank correspond to areas where new schools are also suggested. Springfield – Redbank SA3 is anticipated to cater for an additional six streams of primary in existing schools, while the remaining three SA3s are expected to cater for two additional streams in primary within existing, or planned new schools. In all four of these areas the need for two additional streams in secondary is suggested, thereby not quite meeting criteria to warrant the establishment of an additional P–12 school in these areas.

Two areas anticipated to cater for three streams of secondary schooling within existing independent schools. These areas are Brisbane Inner City SA4, where projections suggest nine secondary streams would be required Brisbane – South SA4 where three additional secondary streams are suggested In both of these areas only one additional primary stream is suggested as required in existing schools, thereby not meeting criteria to warrant the establishment of an additional school in these areas.

Another seven areas are expected to cater for one or two additional streams in secondary within existing schools (Southport, Ipswich Hinterland, Beenleigh, North Lakes, Townsville, Broadbeach – Burleigh and Surfers Paradise SA3s). Of these SA3s, all but for Southport and Ipswich Hinterland

Figure 6: Distribution of Costs

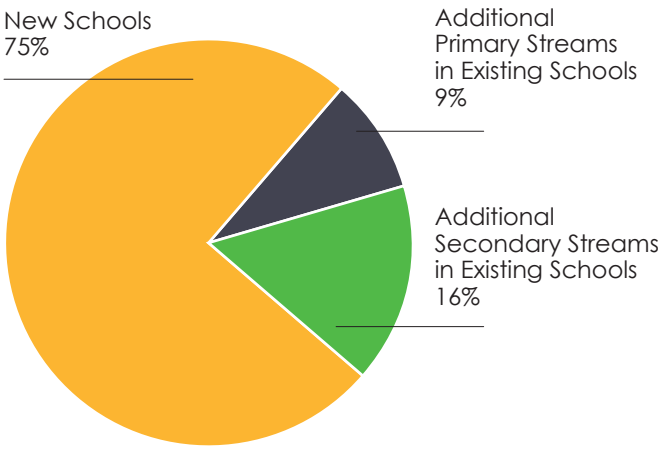
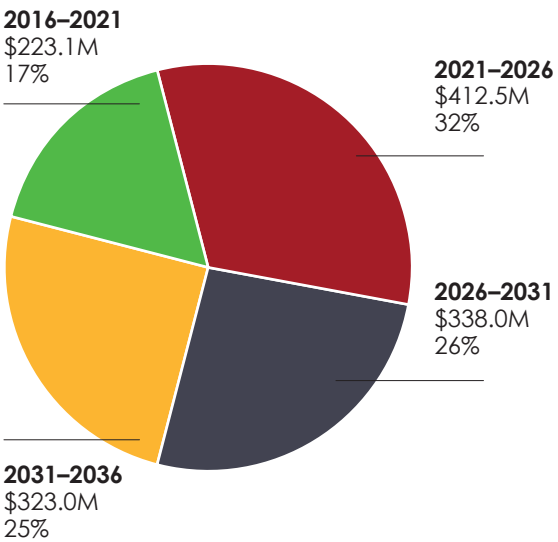


Figure 7: Distribution of Costs by Timeframe, Based on Additional Streams



are also expected to cater for an additional stream in primary, while no additional streams in primary are anticipated to be supported in Southport and Ipswich Hinterland.

Table 3: Cost of Provision, 2016–2036

TYPE OF PROVISION	NUMBER REQUIRED	UNIT COST $M	TOTAL COST $M
New schools	21	44.5	934.9
Additional primary streams in existing schools	31	3.6	112.5
Additional secondary streams in existing schools	43	4.7	201.2
TOTAL			1,248.7

How much?

Based on the conservative assumptions and methodology outlined above, the independent schooling sector would need to invest in the order of $1.25 billion over the 20-year period from 2016–2036, if current levels of parental choice are to be maintained in the future (refer Table 3).

The majority of anticipated costs are expected to be associated with the provision of new schools (75%), with 25% of costs attributed to existing schools catering for additional streams (refer Table 3 and Figure 6). Nearly two-thirds (64%) of the costs anticipated to be incurred by existing schools are expected to be related to catering for secondary students.

Costs over time

To estimate costs over each intercensal period in the 20-year timeframe, from 2016–2036, it has been assumed that in areas where new schools are not warranted costs associated with additional streams being catered for in existing schools are allocated to the appropriate timeframe in which an additional stream is supported.

In areas where new schools would be supported, no additional streams in either primary or secondary are costed until such time as critical stream thresholds of two streams of primary and three streams of secondary are sustained. At that time, costs associated with a new school are factored into costs. Any additional streams projected following the establishment of new schools are then allocated to the appropriate time-period, following the new school(s) being established.

On this basis, highest costs are indicated to occur in the 2031–2036 period, where seven new P–12 schools would be required, along with 18 additional primary and 13 additional secondary streams being supported in existing schools (refer Table 4). These facilities are estimated to cost $437.8 million representing 35% of the total capital cost estimated as being required over the 2016–2036 period. Next highest costs would be incurred in the 2031–2036 period, $402.0 million (32% of total capital costs).

Lowest costs are indicated in the 2016–2021 period, when only one new school and eight additional secondary streams are indicated as being required, and in the 2021–2026 period, when six new schools, one additional primary stream and 12 additional secondary streams are indicated as being required. These timeframes account for 7% and 26% of total costs, respectively.

It should be noted however that the lower costs in these years reflects the assumption that costs associated with new schools are not allocated until such time as a full two stream primary and three stream secondary school is sustained in an area. It is always possible, indeed likely, that new independent schools would commence prior to a full two stream primary and three stream secondary school being supported. New P–12 independent schools in areas of growth, commonly commence offering only one stream in primary and progress into secondary in time, with the number of streams offered in primary and secondary increased commensurate with growth in an area. For this reason, it could be considered more appropriate to utilise the distribution of demand for additional primary and secondary streams in each intercensal period as a mechanism for quantifying costs over time.

Distributing total capital costs of $1.25 billion, on the basis of costs associated with provision of additional streams in primary and secondary, would result in a picture where a higher proportion of costs would be incurred in the earliest timeframes, 2016–2021, and 2021–2026, with highest costs incurred in the 2021–2026 period. Approximately 17% of costs would be incurred within the 2016–2021 period and 32% of costs in the 2026–2031 period (refer Figure 7). The balance, 51% of expenditure, would be in distributed nearly equally between the 2021–2026 and 2031–2036 period (26% of costs within the 2026–2031 period and 25% of costs within the 2031–2036 period).

Table 4: Cost of Provision, by Timeframe

	NUMBER			COST $M			
TIMEFRAME	NEW SCHOOL	EXISTING SCHOOL PRIMARY STREAM	EXISTING SCHOOL SECONDARY STREAM	NEW SCHOOL	EXISTING SCHOOL PRIMARY STREAM	EXISTING SCHOOL SECONDARY STREAM	TOTAL
2016–2021	1	0	8	$44.5	$.0	$37.4	$82.0
2021–2026	6	1	12	$267.1	$3.6	$56.2	$326.9
2026–2031	7	12	10	$311.6	$43.6	$46.8	$402.0
2031–2036	7	18	13	$311.6	$65.3	$60.8	$437.8
TOTAL	21	31	43	$934.9	$112.5	$201.2	$1,248.7

CASE STUDY

Ipswich Inner

The projected school-aged population in the Ipswich Inner SA3 area is expected to increase by 107% over the 20 years from 2016-2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	3,666
Primary streams	10
Secondary streams	9

CAPITAL WORKS REQUIREMENT

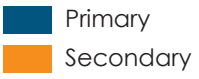
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
3 new P–12 schools inc 27 hectares land	6	9	$133.6m
Learning spaces in existing schools	4	0	$14.5m
TOTAL	**10**	**9**	**$148.1m**

GROWTH OVERVIEW

TABLE 5: GROWTH BY INTERCENSAL PERIOD, IPSWICH INNER SA3

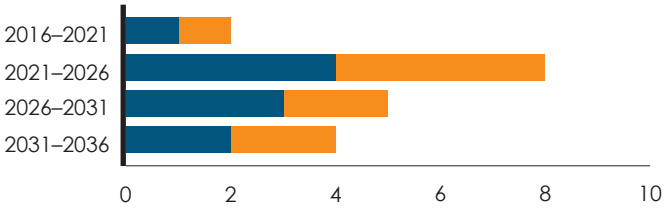
PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	304	327	631
2021–26	621	623	1,244
2026–31	529	452	981
2031–36	419	389	808
2016–36	**1,874**	**1,791**	**3,666**

Figure 8: IPSWICH INNER 2016–2036



Distribution of anticipated growth, by schooling year level

Number of additional primary and secondary streams required, by timeframe



Area profile

Thirteen SA2s comprise the Ipswich Inner SA3: Brassall, Bundamba, Churchill – Yamanto, Ipswich – Central, Ipswich – East, Ipswich – North, Karalee – Barellan Point, Karana Downs, Leichhardt – One Mile, North Ipswich – Tivoli, Raceview, Ripley and Riverview.

There are currently six independent schools in this area: Bethany Lutheran Primary School, Ipswich Adventist School, Ipswich Girls' Grammar School, Ipswich Grammar School, West Moreton Anglican College and YMCA Vocational School. Three of these schools currently offer P–12 schooling, two offer only primary schooling and one school caters for disengaged youth in secondary year levels (the Bundamba campus of YMCA Vocational School, which commenced in 2017). In 2016 independent schools in this area catered for 3,469 students (1,378 primary students and 2,091 secondary students).

Growth in student population

An additional 3,666 school-aged children are projected to attend an independent school in the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

There is a slightly higher need for primary schooling places than secondary schooling places. Based on current levels of parental choice, independent schools would need to cater for an additional:

- 1,874 primary school-aged children (51% of anticipated growth).
- 1,791 secondary school-aged children (49% of anticipated growth).

Location and timeframe for growth

Growth is anticipated across all SA2s in the area, except for Karana Downs (refer Map 3).

Ripley is anticipated to account for 77% of growth in the number of students expected to attend independent schools in this area. Ipswich Central accounts for the next highest proportion of growth (7% of total growth).

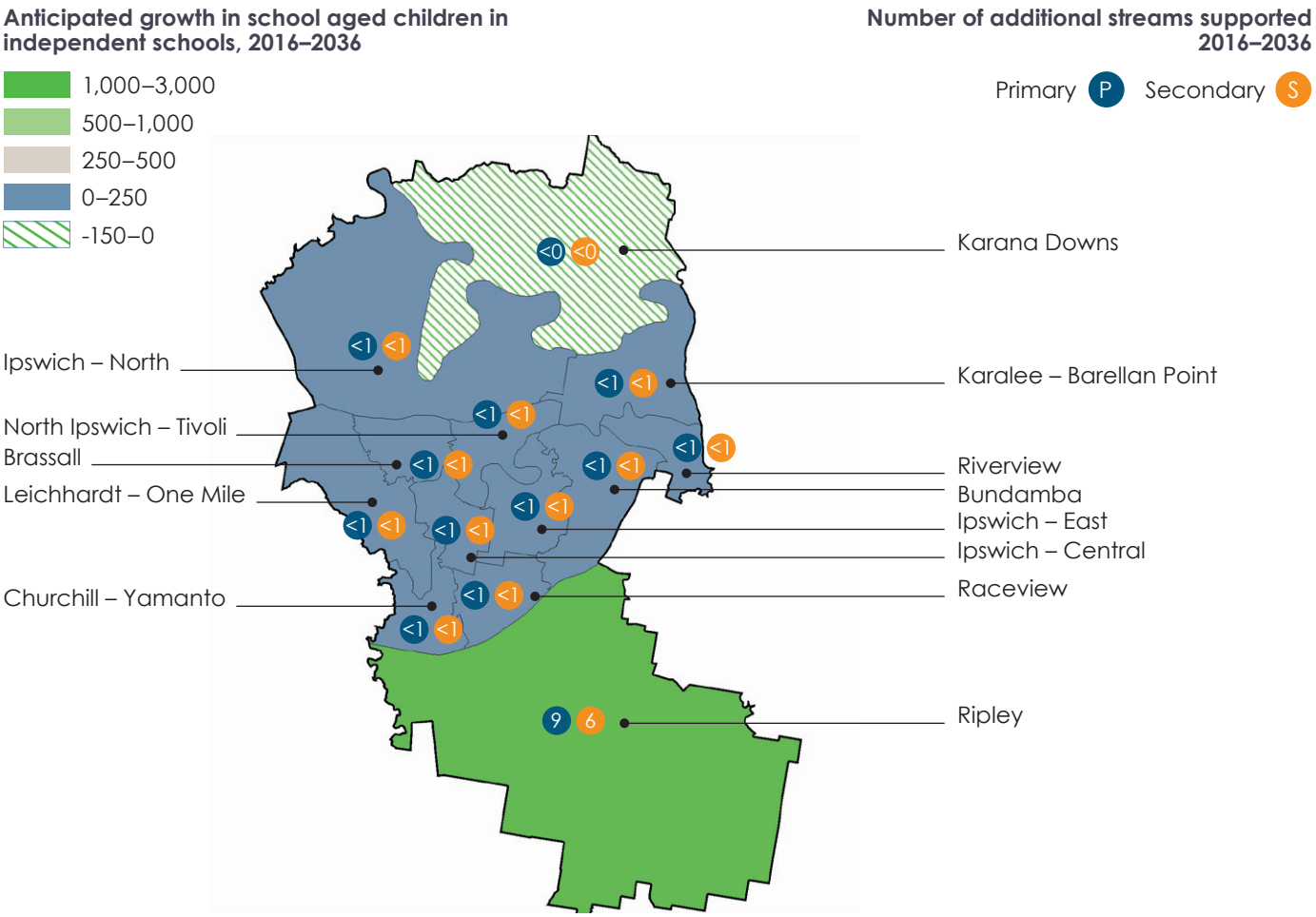
In each intercensal period (five-year period between each official population census), growth is expected in the numbers of students accessing independent schools for primary and secondary schooling (refer Table 5).

Lowest growth in primary is anticipated from 2016–2021, followed by highest growth expected in the 2021–2026 period. After this time the level of growth is expected to reduce moderately over time. In the case of secondary, a similar pattern of growth is presented, with lowest growth in the 2016–2021 period, followed by highest growth in the 2021–2016 period and lower growth in the following intercensal period.

Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional 10 primary streams and nine secondary streams.

MAP 3: IPSWICH INNER



While 12 of the 13 SA2s in the SA3 are expected to experience growth in the number of independent school students over the 2016–2036 period, only one SA2, Ripley, would be expected to support at least one full primary stream. This is also the only SA2 individually expected to support at least one full secondary stream (refer Map 3). Ripley SA2 would support an additional nine full primary streams and six full secondary streams over the twenty year timeframe from 2016–2026.

The number of primary and secondary streams required in intercensal periods is expected to range from two to eight (refer Figure 8). One additional primary stream and one additional secondary stream would be sustained by 2021, with a further four primary and four secondary streams supported the period 2021–2026. In the period 2026–2031 another three primary and two secondary streams would be supported, followed by another two primary and two secondary streams in the period 2031–2036.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

Three new P–12 schools could be needed, which would cater for six of the 10 primary streams and all nine of the secondary streams projected as being required for this area to maintain parental choice levels.

The balance of four primary streams are assumed to be catered for by additional capacity being added to existing schools, or new schools, in the area.

It is estimated that approximately $148.1 million would be required to fund capital works in Ipswich Inner SA3.

NEW SCHOOLS

The estimated cost for three new schools is $133.6 million. This includes $16.2 million for 27 hectares of land (11% of total costs). Projections suggest an additional school would be sustained in 2021–2026, another in 2026–2031, and one further school in the 2031–2036 period.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

The additional learning spaces in existing schools needed to cater for four primary streams at existing schools are estimated to cost $14.5 million.

CASE STUDY

Ormeau – Oxenford

The projected school-aged population in the Ormeau – Oxenford SA3 area is expected to increase by 96% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	5,278
Primary streams	14
Secondary streams	15
Special Assistance Schools (not inc in costings)	1

CAPITAL WORKS REQUIREMENT

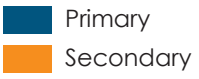
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
5 new P–12 schools inc 45 hectares land	10	15	$222.6m
Learning spaces in existing schools	4	0	$14.5m
TOTAL	**14**	**15**	**$237.1m**

GROWTH OVERVIEW

TABLE 6: GROWTH BY INTERCENSAL PERIOD, ORMEAU – OXENFORD SA3

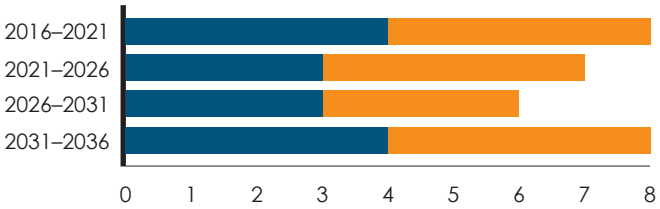
PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	729	746	1,475
2021–26	582	783	1,365
2026–31	606	621	1,227
2031–36	550	661	1,210
2016–36	**2,468**	**2,810**	**5,278**

Figure 9: ORMEAU – OXENFORD 2016–2036



Distribution of anticipated growth, by schooling year level

Number of additional primary and secondary streams required, by timeframe



Area profile

Eight SA2s comprise the Ormeau – Oxenford SA3: Coomera, Helensvale, Hope Island, Jacobs Well – Alberton, Ormeau – Yatala, Oxenford – Maudsland, Pimpama and Upper Coomera – Willow Vale.

There are currently seven independent schools in this area: Livingstone Christian College, Saint Stephen's College, Lutheran Ormeau Rivers District School, King's Christian College (Pimpama Campus), Rivermount College, Coomera Anglican College and Toogoolawa School. Five of these schools currently offer P–12 schooling. The exceptions are Toogoolawa School, which caters for disengaged youth, and the Pimpama campus of King's Christian College, which currently offers only primary schooling and Year 7 in secondary, and will to progress to offer a full complement of secondary in the future. In 2016 these seven schools catered for 5,363 students (2,951 primary students and 2,412 secondary students).

Growth in student population

An additional 5,278 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

Greater need would be for secondary schooling places. Based on current levels of parental choice, independent schools would need to cater for:

- 2,468 primary school-aged children (47% of anticipated growth)
- 2,810 secondary school-aged children (53% of anticipated growth).

Location and timeframe for growth

Growth in the number of students attending an independent school is anticipated across all SA2s in the area. Coomera is anticipated to account for the highest proportion of growth (46%) in the number of students expected to attend independent schools (refer Map 4). Next highest growth is expected in Pimpama (16% of growth) followed by Upper Coomera – Willow Vale and Hope Island (9% of growth in each SA2).

In each intercensal period (five-year period between each official population census), growth is expected in the number of students accessing independent schools for primary and secondary schooling (refer Table 6).

Highest growth in primary is anticipated in the 2016–2021 period, before reducing slightly in the following intercensal periods through to 2036. Highest growth in secondary is anticipated in the 2021–2026, followed by the 2016–2021 period. Post 2026 level of growth in secondary is projected to reduce slightly, with similar levels of growth in both the 2026–2031 and 2031–2036 periods.

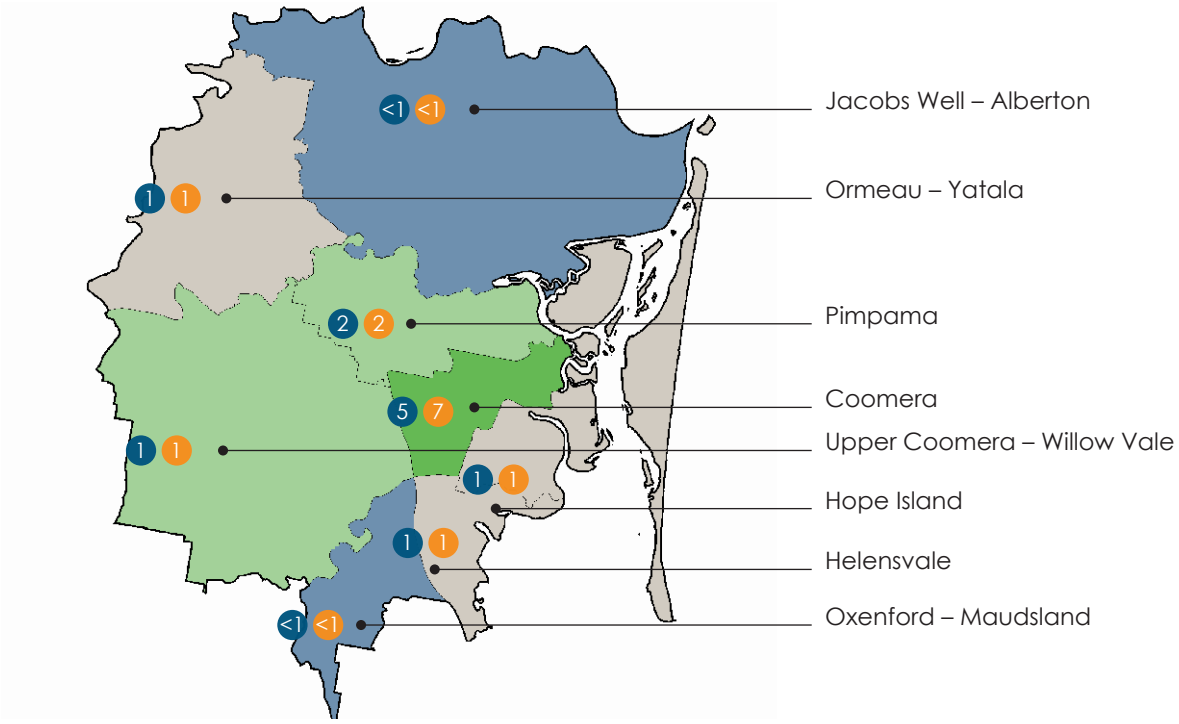
MAP 4: ORMEAU – OXENFORD

Anticipated growth in school aged children in independent schools, 2016–2036

- 1,000–3,000
- 500–1,000
- 250–500
- 0–250
- -150–0

Number of additional streams supported 2016–2036

Primary (P) Secondary (S)



Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional 14 primary streams and 15 secondary streams.

While all eight SA2s are expected to experience growth in the number of independent school students over time, six of these individual SA2s are projected to support at least one full primary stream, and at least one full secondary stream over the 2016–2036 period (refer Map 4).

The SA2s which would support additional streams in both primary and secondary are: Coomera, Pimpama, Helensvale, Hope Island, Ormeau – Yatala and Upper Coomera – Willow Vale.

Coomera is the SA2 expected to support the greatest number of streams over the 20-year period, with projections suggesting the area would sustain an additional five full primary streams and seven full secondary streams (refer Map 4).

The number of primary and secondary streams required in intercensal periods is expected to range from six to eight (refer Figure 9). Four additional primary streams and four additional secondary streams would be sustained by 2021, with a further three primary and four secondary streams supported in the 2021–2026 period. In the 2026–2031 period another three primary and three secondary streams would be warranted, followed by another four primary and four secondary streams in the 2031–2036 period.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

Five new P–12 schools could be needed, which would cater for 10 of the 14 primary streams and all 15 of the secondary streams projected for this area. The balance of four primary streams are assumed to be catered for by additional capacity being added to existing schools.

It is estimated that approximately $237.1 million would be required to fund capital works in the Ormeau – Oxenford SA3.

NEW SCHOOLS

The estimated cost for five new schools is $222.6 million. This includes $27 million for 45 hectares of land (11% of total cost).

Projections suggest an additional school would be sustained in each intercensal period, except for 2026–2031 when two new schools would be supported.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

Existing schools are needed to cater for four primary streams which is estimated to cost $14.5 million.

CASE STUDY

Jimboomba

The projected school-aged population in the Jimboomba SA3 area is expected to increase by 189% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	3,119
Primary streams	8
Secondary streams	9

CAPITAL WORKS REQUIREMENT

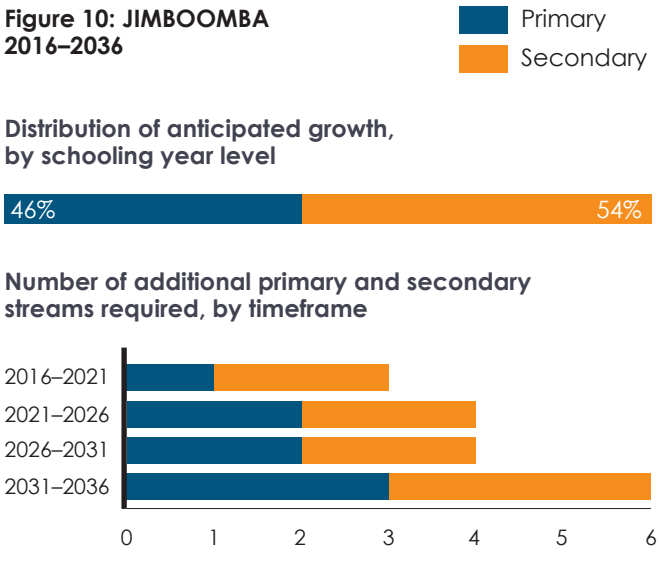
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
3 new P–12 schools inc 27 hectares land	6	9	$133.6m
Learning spaces in existing schools	2	0	$7.3m
TOTAL	**8**	**9**	**$140.8m**

GROWTH OVERVIEW

TABLE 7: GROWTH BY INTERCENSAL PERIOD, JIMBOOMBA SA3

PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	288	390	679
2021–26	340	401	741
2026–31	360	392	752
2031–36	431	515	946
2016–36	**1,420**	**1,699**	**3,119**

Figure 10: JIMBOOMBA 2016–2036



Area profile

Three SA2s comprise the Jimboomba SA3: Greenbank, Jimboomba and Logan Village.

There are currently two independent schools in this area, Hills International College, which offers P–12 schooling, and Australian Technology and Agricultural College which opened in 2018 and caters for students in Years 10–12.

In 2016 Hills International College catered for 507 students (257 primary students and 250 secondary students).

Growth in student population

An additional 3,119 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

Greatest need would be for secondary schooling places. Based on current levels of parental choice, independent schools would need to cater for:

- 1,699 secondary school-aged children (54% of anticipated growth)
- 1,420 primary school-aged children (46% of anticipated growth).

Location and timeframe for growth

Growth in the number of students attending an independent school is anticipated across all three SA2s in the area, albeit modest growth in Logan Village SA2 is suggestive of stability (refer Map 5). Jimboomba and Greenbank SA2s are both anticipated to account for similar proportions of growth in the number of students expected to attend independent schools, if parental choice is maintained (49% and 50%, respectively).

In each intercensal period (five-year period between each official population census), growth in the number of students accessing independent schools for primary and secondary schooling is expected (refer Table 7).

Significant growth for both primary and secondary places is suggested in each intercensal period, with highest increases expected to occur from 2031–2036.

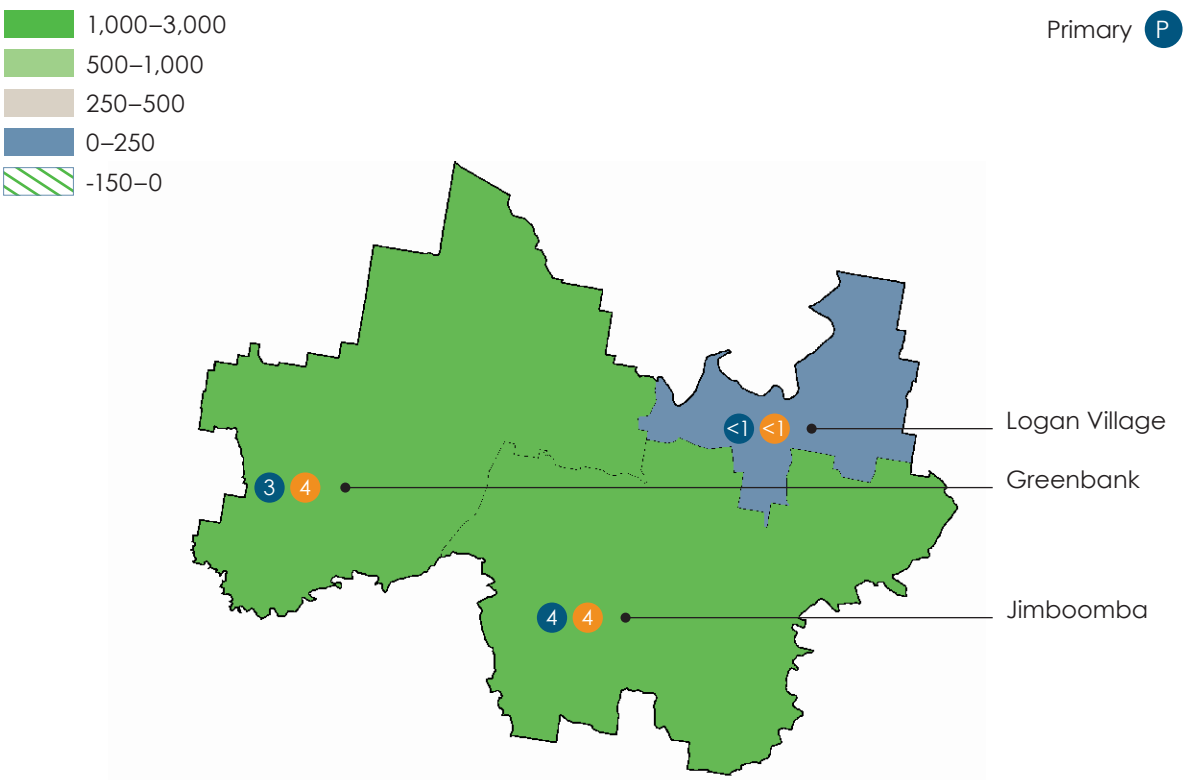
Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional eight primary streams and nine secondary streams.

While all three SA2s in the SA3 are expected to experience growth in the number of independent school students over time, only two SA2s would be expected to support at least one full primary stream and one full secondary stream over the 2016–2026 period (refer Map 5).

The SA2s which individually would support additional streams are Greenbank and Jimboomba, both of which would support additional primary streams and secondary. The greatest number of additional streams supported over the 20-year period would be in Jimboomba, with projections suggesting

MAP 5: JIMBOOMBA



the SA2 would sustain an additional four full primary streams and four full secondary streams (refer Map 5). Greenbank would support three full primary streams and four full secondary streams.

The number of primary and secondary streams required in intercensal periods is expected to range from three to six (refer Figure 10). One additional primary stream and two additional secondary streams would be sustained by 2021, with a further two primary and two secondary streams supported in the 2021–2026 period. In the 2026–2031 period another two primary and two secondary streams would be warranted, followed by another three primary and three secondary streams in the 2031–2036 period.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three streams in secondary are sustained.

Three new P–12 schools could be needed, which would cater for six of the eight primary streams and all nine of the secondary streams projected for this area. The balance of two primary streams are assumed to be catered for by additional capacity being added to existing schools.

It is estimated that approximately $140.8 million would be required to fund capital works in the Jimboomba SA3.

NEW SCHOOLS

The estimated cost for three new schools is $133.6 million. This includes $16.2 million for 27 hectares of land (12% of total cost).

Projections suggest an additional school would be sustained in each intercensal period from 2021.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

The additional learning spaces in existing schools needed to cater for two primary streams at existing schools are estimated to cost $7.3 million.

CASE STUDY

Caloundra

The projected school-aged population in the Caloundra SA3 area is expected to increase by 84% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	1,817
Primary streams	4
Secondary streams	5

CAPITAL WORKS REQUIREMENT

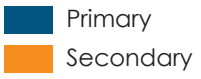
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
1 new P–12 school inc 9 hectares land	2	3	$44.5m
Learning spaces in existing schools	2	2	$16.6m
TOTAL	**4**	**5**	**$61.1m**

GROWTH OVERVIEW

TABLE 8: GROWTH BY INTERCENSAL PERIOD, CALOUNDRA SA3

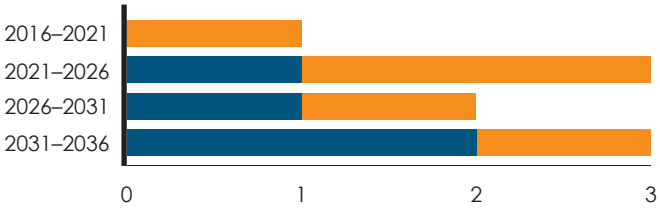
PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	139	322	461
2021–26	160	258	418
2026–31	220	192	411
2031–36	233	294	527
2016–36	**752**	**1,065**	**1,817**

Figure 11: CALOUNDRA 2016–2036



Distribution of anticipated growth, by schooling year level

Number of additional primary and secondary streams required, by timeframe



Area profile

Eight SA2s comprise the Caloundra SA3: Aroona – Currimundi, Buddina – Minyama, Caloundra – Kings Beach, Caloundra – West, Golden Beach – Pelican Waters, Moffat Beach – Battery Hill, Parrearra – Warana and Wurtulla – Birtinya.

There are currently three independent schools in this area: Caloundra Christian College, Caloundra City Private School and Pacific Lutheran College. All three of these schools currently offer P–12 schooling. In 2016 these three schools catered for 1,597 students (776 primary students and 821 secondary students).

Growth in student population

An additional 1,817 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

Greatest need would be for secondary schooling places. Based on current levels of parental choice, independent schools would need to cater for:

- 1,065 secondary school-aged children (59% of anticipated growth)
- 752 primary school-aged children (41% of anticipated growth).

Location and timeframe for growth

Growth in the number of students attending an independent school is anticipated in all SA2s in the area, albeit slight increases in school-aged children numbers, indicative of stability, is anticipated in Aroona – Currimundi, Moffat Beach – Battery Hill and Caloundra – Kings Beach (refer Map 6).

Caloundra West is anticipated to account for the highest proportion of growth (58% of growth) in the number of students expected to attend independent schools. Next highest proportion of growth is expected in Parrearra – Warana SA2 (13% of growth) followed by Buddina – Minyama and Golden Beach – Pelican Waters SA2 (9% and 8% of growth, respectively).

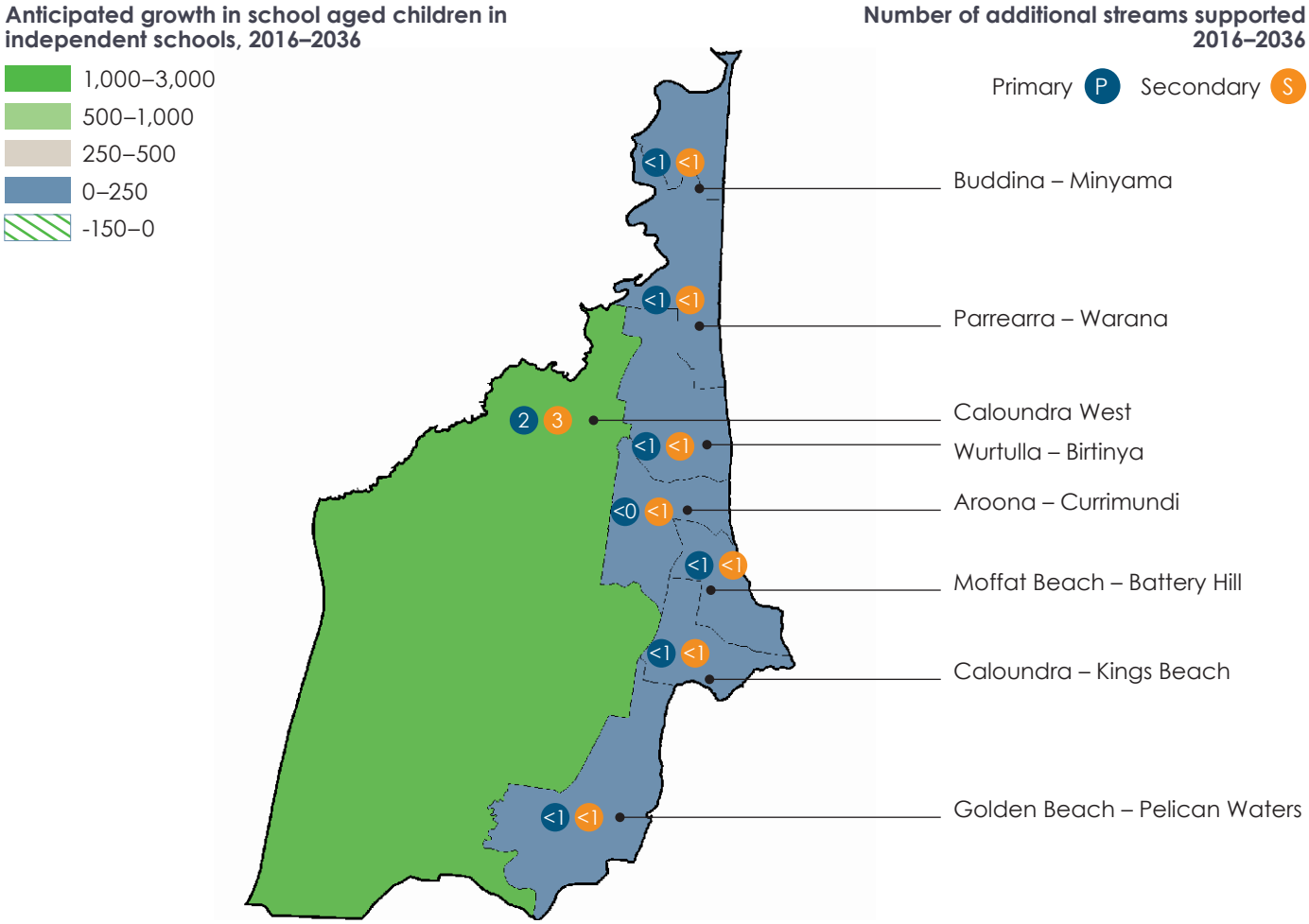
In each intercensal period (five-year period between each official population census), growth in the number of students accessing independent schools for primary and secondary schooling is expected (refer Table 10).

Modest growth in primary demand is anticipated in each intercensal period through to 2031–2036, with highest growth expected from 2021–2026. Highest growth in secondary is anticipated in the 2016–2021 period, with growth levels reducing through to 2026–2031 before increasing significantly from 2031–2036.

Additional capacity to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional four primary streams and five secondary streams.

MAP 6: CALOUNDRA



While all eight SA2s are expected to experience growth in the number of independent school students over time, only Caloundra West would be expected to support at least one full primary stream and at least one full secondary stream over the period 2016–2036 (refer Map 6).

Caloundra West would sustain an additional two full primary streams and three full secondary streams (refer Map 6).

The number of primary and secondary streams required in intercensal periods is expected to range from one to three (refer Figure 11). One additional secondary stream would be sustained by 2021, with one primary and two secondary streams supported in the 2021–2026 period. In the 2026–2031 period one primary and one secondary stream would be warranted, followed by another two primary and one secondary stream in the 2031–2036 period.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

One new P–12 school would be needed, which would cater for two of the four primary streams and three of the five secondary streams projected for this area. The balance of two primary streams and two secondary streams are assumed to be catered for by additional capacity being added to existing schools.

In total, based on cost-estimates presented earlier in the report, at current costs, approximately $61.1 million would be required to fund capital works in the Caloundra West SA3.

NEW SCHOOLS

The estimated cost for one new school is $44.5 million. This includes $5.4 million for 9 hectares of land (9% of total cost).

Projections suggest an additional school would be sustained in the 2021–2026 period.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

The additional learning spaces in existing schools needed to cater for two primary streams and two secondary streams at existing schools are estimated to cost $16.6 million.

CASE STUDY

Springfield – Redbank

The projected school-aged population in the Springfield – Redbank SA3 area is expected to increase by 112% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	3,423
Primary streams	10
Secondary streams	8

CAPITAL WORKS REQUIREMENT

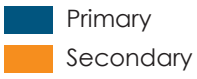
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
2 new P–12 schools inc 18 hectares land	4	6	$89.0m
Learning spaces in existing schools	6	2	$31.1m
TOTAL	**10**	**8**	**$120.2m**

GROWTH OVERVIEW

TABLE 9: GROWTH BY INTERCENSAL PERIOD, SPRINGFIELD – REDBANK SA3

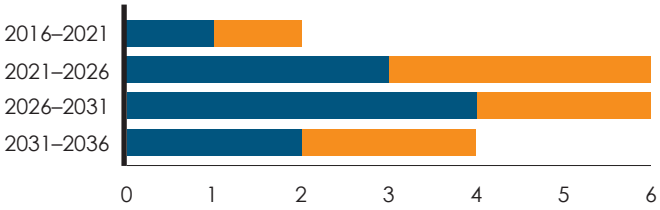
PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	346	357	703
2021–26	420	387	808
2026–31	650	425	1,075
2031–36	464	374	838
2016–36	**1,880**	**1,543**	**3,423**

Figure 12: SPRINGFIELD – REDBANK 2016–2036



Distribution of anticipated growth, by schooling year level

Number of additional primary and secondary streams required, by timeframe



Area profile

Nine SA2s comprise the Springfield – Redbank SA3: Bellbird Park – Brookwater, Camira – Gailes, Carole Park, Collingwood Park – Redbank, Goodna, New Chum, Redbank Plains, Springfield and Springfield Lakes.

In this area there are currently six independent schools: Hymba Yumba Independent School, St Peters Lutheran College – Springfield, Staines Memorial College, The Springfield Anglican College, Westside Christian College and YOS Lawnton – Goodna. With the exception of the campus of YOS Lawnton at Goodna, all of these schools currently offer P–12 schooling. YOS Lawnton – Goodna, a Special Assistance School, caters for students in Years 10–12 and opened in 2019.

In 2016 the five schools operating at that time catered for 2,912 students (1,559 primary students and 1,353 secondary students)

Growth in student population

An additional 3,423 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

Greater need would be for primary schooling places. Based on current levels of parental choice, independent schools would need to cater for:

- 1,880 primary school-aged children (55% of anticipated growth).
- 1,543 secondary school-aged children (45% of anticipated growth).

Location and timeframe for growth

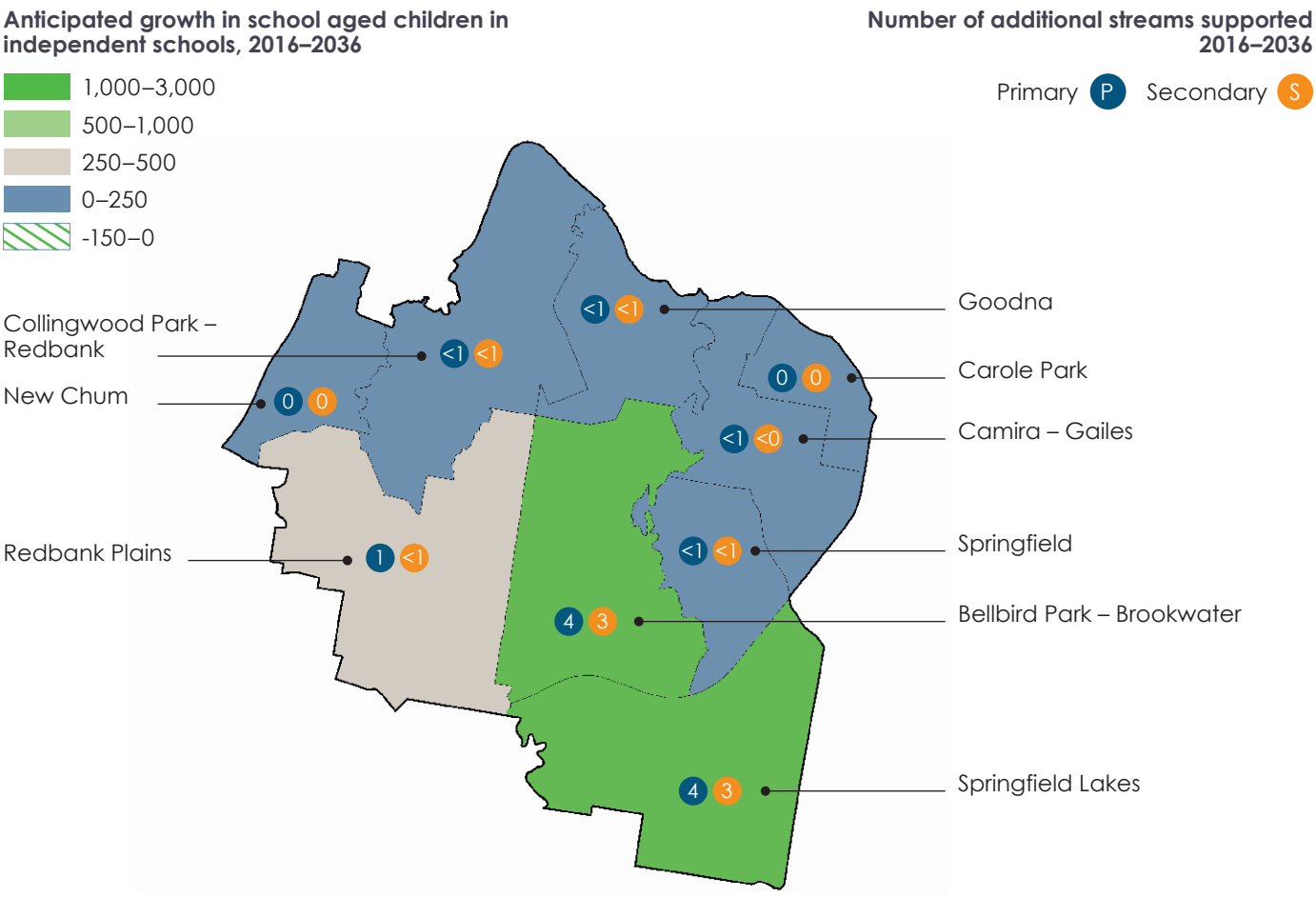
Growth in the number of students attending an independent school is anticipated across all but two SA2s in the area. These two exceptions are New Chum and Carole Park SA2s. According to the 2016 census, these SA2s contained no school students. This assumption has been continued throughout the 20-year projection period (refer Map 7).

Bellbird Park – Brookwater SA2 is anticipated to account for the highest proportion of growth (45%) in the number of students expected to attend independent schools, if parental choice is maintained. The next highest proportion of growth is expected in Springfield Lakes SA2 (39% of growth), followed by Redbank Plains SA2 (10% of growth).

In each intercensal period (five-year period between each official population census), growth in the number of students accessing independent schools for primary and secondary schooling is expected (refer Table 9).

Growth in primary is anticipated to increase in each intercensal period through to 2031–2036, when the level of growth is expected to reduce slightly. Similarly, growth in secondary is anticipated to increase in each intercensal period until 2031–2036, when the level of growth is expected to be at similar levels as suggested in the 2021–2026 period.

MAP 7: SPRINGFIELD – REDBANK



Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional 10 primary streams and eight secondary streams.

All seven of the SA2s in the SA3 which contain students are expected to experience growth in the number of independent school students over time, only three SA2s would be expected to support at least one full primary stream and one full secondary stream.

The SA2s which individually would support additional streams are Bellbird Park – Brookwater, Springfield Lakes and Redbank Plains. The equal highest number of additional streams supported over the 20-year period would be in Bellbird Park – Brookwater and Springfield Lakes SA2s, both of which could support an additional four full primary streams and three full secondary streams (refer Map 7).

The number of primary and secondary streams required in intercensal periods is expected to range from two to six (refer Figure 12). One additional primary stream and one additional secondary stream would be sustained by 2021, with a further three primary and three secondary streams supported in the 2021–2026 period. In the 2026–2031 period another four primary streams and two secondary stream would be warranted, followed by another two primary and two secondary streams in the 2031–2036 period.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

Two new P–12 schools could be needed, which would cater for four of the 10 primary streams and six of the eight secondary streams projected for this area. The balance of six primary streams and two secondary streams are assumed to be catered for by additional capacity being added to existing schools.

It is estimated that approximately $120.2 million would be required to fund capital works in the Springfield – Redbank SA3.

NEW SCHOOLS

The estimated cost for two new schools is $89.0 million. This includes $10.8 million for 18 hectares of land (9% of total cost).

Projections suggest an additional school would be sustained in the 2021–2026 and 2026–2031 periods.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

The additional learning spaces in existing schools needed to cater for six primary streams and two secondary streams at existing schools are estimated to cost $31.1 million.

CASE STUDY

Townsville

The projected school-aged population in the Townsville SA3 area is expected to increase by 30% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	1,482
Primary streams	3
Secondary streams	4

CAPITAL WORKS REQUIREMENT

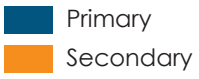
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
1 new P–12 school inc 9 hectares land	2	3	$44.5m
Learning spaces in existing schools	1	1	$8.3m
TOTAL	**3**	**4**	**$52.8m**

GROWTH OVERVIEW

TABLE 10: GROWTH BY INTERCENSAL PERIOD, TOWNSVILLE SA3

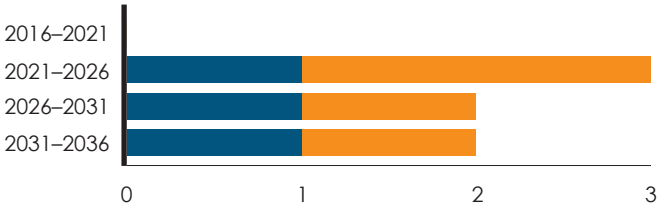
PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	75	173	248
2021–26	146	228	374
2026–31	206	189	395
2031–36	207	256	464
2016–36	**635**	**847**	**1,482**

Figure 13: TOWNSVILLE 2016–2036



Distribution of anticipated growth, by schooling year level

Number of additional primary and secondary streams required, by timeframe



Area profile

Twenty-five SA2s comprise the Townsville SA3: Aitkenvale, Annandale, Belgian Gardens – Pallarenda, Bohle Plains, Condon – Rasmussen, Cranbrook, Deeragun, Douglas, Garbutt – West End, Gulliver – Currajong – Vincent, Heatley, Hermit Park – Rosslea, Hyde Park – Pimlico, Kelso, Kirwan – East, Kirwan – West, Magnetic Island, Mount Louisa, Mundingburra, Northern Beaches, Oonoonba, South Townsville – Railway Estate, Townsville – South, Townsville City – North Ward and Wulguru – Roseneath.

There are currently 10 independent schools in this area: Annandale Christian College, Calvary Christian College, Riverside Adventist Christian School, Shalom Christian College, Tec-NQ, The Cathedral School of St Anne and St James, Townsville Christian College, Townsville Grammar School, which has three campuses operating, Enkindle Village School and Mungalla Silver Lining School.

Since 2016 a number of new schools have opened in this SA3. In 2018 an additional campus of Tec-NQ commenced, while both Enkindle Village School and Mungalla Silver Lining School commenced in 2019.

In 2016 the eight schools operating at that time catered for 4,434 students (1,966 primary students and 2,468 secondary students).

Growth in student population

An additional 1,482 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

Greatest need would be for secondary schooling places. Based on current levels of parental choice, independent schools would need to cater for:

- 635 primary school-aged children (43% of anticipated growth).
- 847 secondary school-aged children (57% of anticipated growth).

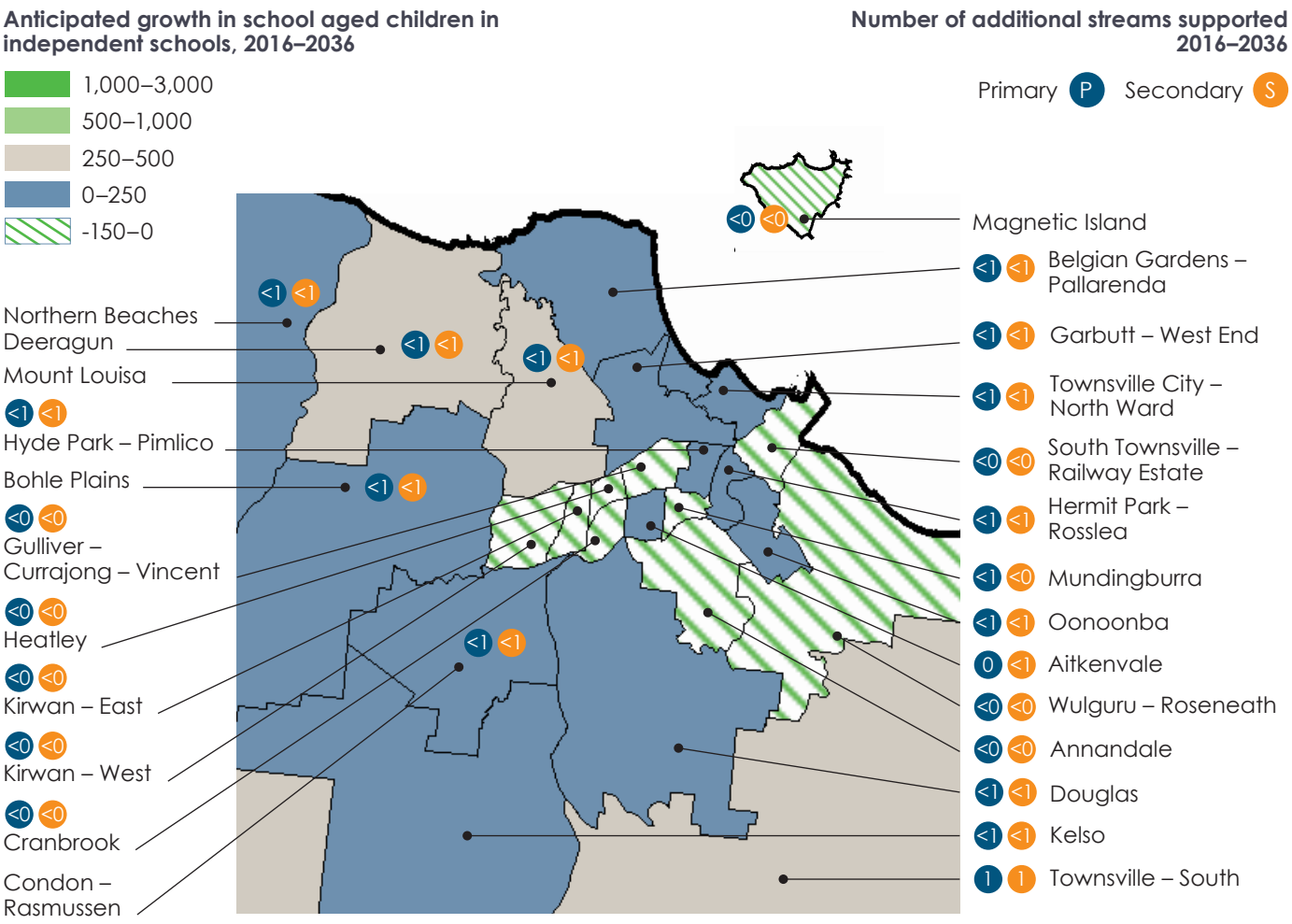
Location and timeframe for growth

Growth in the number of students attending an independent school is anticipated across 15 of the 25 SA2s within this area, with only six SA2s anticipated to experience growth in demand in excess of 100 places (Bohle Plains, Deeragun, Mount Louisa, Oonoonba, Townsville – South and Townsville City – North Ward).

Toowoomba – South SA2 is anticipated to account for the highest proportion of growth (27%) in the number of students expected to attend independent schools, if parental choice is maintained (refer Map 8).

The next highest proportion of growth is expected in Deeragun SA2 (22% of growth) followed by Mount Louisa SA2 (18% of growth).

MAP 8: TOWNSVILLE



In each intercensal period (five-year period between each official population census), growth in the number of students accessing independent schools for primary and secondary schooling is expected (refer Table 10).

Growth in primary is anticipated to remain relatively stable over each intercensal period, with growth ranging from 222 to 261 students in intercensal periods. The level of growth in secondary is anticipated to reduce slightly over time.

Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional three primary streams and four secondary streams.

Only one of the 25 SA2s would be able to support at least one full primary stream and at least one full secondary stream over the period 2016–2036 (refer Map 8). This is Townsville – South SA2, which would sustain an additional one full primary stream and one full secondary stream (refer Map 8).

The number of primary and secondary streams required in intercensal periods is expected to range from none to three (refer Figure 13). No primary or secondary streams would be warranted in the 2016–2021 period, with one primary and two secondary streams supported from 2021–2026, and one primary stream and one secondary stream supported in each of the following two intercensal periods (2026–2031 and 2031–2036).

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

One new P–12 school would be needed, which would cater for two of the three primary streams and three of the four secondary streams projected for this area. The balance of one primary stream and one secondary stream is assumed to be catered for by additional capacity being added to existing schools.

In total, based on cost-estimates presented earlier in the report, at current costs, approximately $52.8 million would be required to fund capital works in the Townsville SA3.

NEW SCHOOLS

The estimated cost for one new school is $44.5 million. This includes $5.4 million for 9 hectares of land (10% of total cost).

Projections suggest this additional school would be sustained in the 2026–2031 period.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

The additional learning spaces in existing schools needed to cater for one primary stream and one secondary stream at existing schools is estimated to cost $8.3 million.

CASE STUDY

Ipswich Hinterland

The projected school-aged population in the Ipswich Hinterland SA3 area is expected to increase by 70% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	1,392
Primary streams	2
Secondary streams	5

CAPITAL WORKS REQUIREMENT

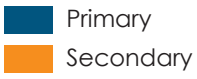
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
1 new P–12 school inc 9 hectares land	2	3	$44.5m
Learning spaces in existing schools	0	2	$9.4m
TOTAL	**2**	**5**	**$53.9m**

GROWTH OVERVIEW

TABLE 11: GROWTH BY INTERCENSAL PERIOD, IPSWICH HINTERLAND SA3

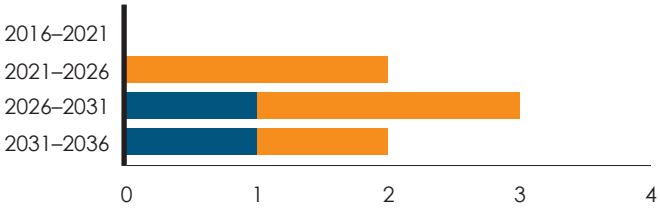
PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	51	149	200
2021–26	117	310	426
2026–31	131	286	418
2031–36	104	243	348
2016–36	**403**	**989**	**1,392**

Figure 14: IPSWICH HINTERLAND 2016–2036



Distribution of anticipated growth, by schooling year level

Number of additional primary and secondary streams required, by timeframe



Area profile

Six SA2s comprise the Ipswich Hinterland SA3: Boonah, Esk, Lake Manchester – England Creek, Lockyer Valley – East, Lowood and Rosewood.

There is currently one independent school in this area: Faith Lutheran College – Plainland. In 2016 this school catered for 725 secondary students.

Growth in student population

An additional 1,392 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

There is a higher need for secondary schooling places than primary schooling places. Based on current levels of parental choice, independent schools would need to cater for an additional:

- 403 primary school-aged children (29% of anticipated growth)
- 989 secondary school-aged children (71% of anticipated growth).

Location and timeframe for growth

Growth is anticipated across all of the SA2s in the area, except for Lake Manchester – England Creek SA2, where no school-aged children are indicated as residing, and Esk SA2 where stability is suggested (refer Map 9). Low growth, indicative of relative stability, is also suggested in Boonah SA2.

Rosewood SA2 is anticipated to account for 74% of growth in the number of students expected to attend independent schools in this area. Lowood SA2 accounts for the next highest proportion of growth (16% of total growth).

In each intercensal period (five-year period between each official population census), growth is expected in the numbers of students accessing independent schools for primary and secondary schooling (refer Table 11).

Lowest growth in primary is anticipated from 2016–2021, with higher levels of growth expected in the two following intercensal periods (2021–2026 and 2026–2031), followed by a slight reduction in growth expected in the 2031–2036 period. In the case of secondary, lowest growth is expected in the 2016–2021 period, followed by highest growth in the 2021–2026 period, with successively lower levels of growth in the 2026–2031 and 2031–2036 periods.

Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional two primary streams and five secondary streams.

While four of the six SA2s in the SA3 are expected to experience some growth in the number of independent school students that would need to be supported over time to maintain current level of parental choice, only one SA2, Rosewood, is suggested as capable of supporting at least

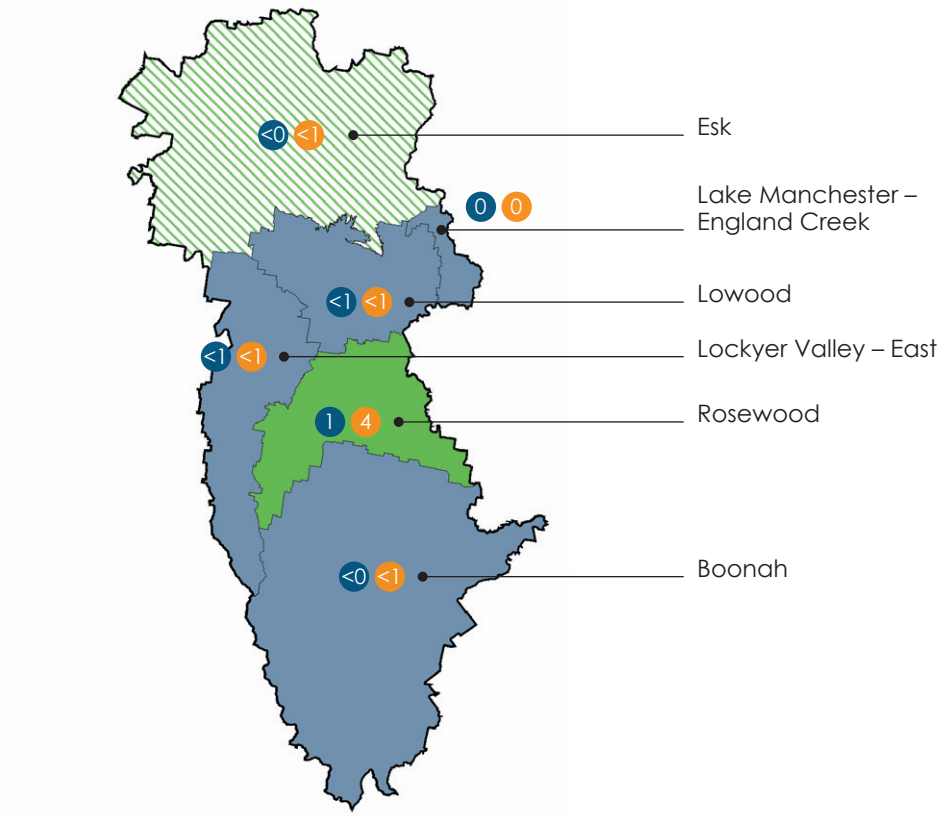
MAP 9: IPSWICH HINTERLAND

Anticipated growth in school aged children in independent schools, 2016–2036

- 1,000–3,000
- 500–1,000
- 250–500
- 0–250
- -150–0

Number of additional streams supported 2016–2036

Primary (P) Secondary (S)



one full primary stream. This is also the only SA2 expected to support at least one full secondary stream in the 2016–2036 period, (four streams suggested as being supported in the timeframe) (refer Map 9).

The number of primary and secondary streams required in each intercensal period is expected to range from zero to three (refer Figure 14). No additional primary or secondary streams are expected to be required in the 2016–2026 period. Two additional secondary streams would be supported in the period 2021–2026, while in the 2026–2031 period one primary and two secondary streams would be supported. In the following 2031–2036 period, one primary and one secondary stream would be supported.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

One new P–12 school could be needed, which would cater for both primary streams and three of the five secondary streams projected for this area.

The balance of two secondary streams is assumed to be catered for by additional capacity being added to existing schools.

It is estimated that approximately $53.9 million would be required to fund capital works in Ipswich Hinterland SA3.

NEW SCHOOLS

The estimated cost for the new school is $44.5 million. This includes $5.4 million for 9 hectares of land (10% of total costs). Projections suggest an additional P–12 school would be sustained in the 2031–2036 period.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

Existing schools are needed to cater for two secondary streams which is estimated to cost $9.4 million.

CASE STUDY

Narangba – Burpengary

The projected school-aged population in the Narangba – Burpengary SA3 area is expected to increase by 65% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	1,315
Primary streams	3
Secondary streams	3

CAPITAL WORKS REQUIREMENT

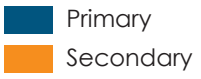
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
1 new P–12 school inc 9 hectares land	2	3	$44.5m
Learning spaces in existing schools	1	0	$3.6m
TOTAL	**3**	**3**	**$48.2m**

GROWTH OVERVIEW

TABLE 12: GROWTH BY INTERCENSAL PERIOD, NARANGBA – BURPENGARY SA3

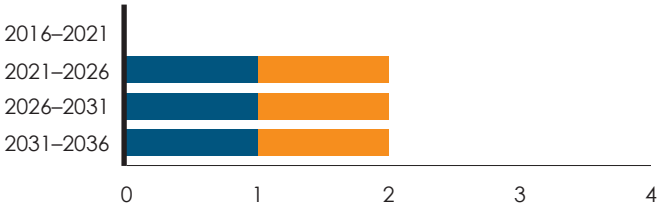
PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	79	135	213
2021–26	105	135	239
2026–31	200	176	376
2031–36	239	248	486
2016–36	**622**	**693**	**1,315**

Figure 15: NARANGBA – BURPENGARY 2016–2036



Distribution of anticipated growth, by schooling year level

Number of additional primary and secondary streams required, by timeframe



Area profile

Five SA2s comprise the Narangba – Burpengary SA3: Burpengary, Deception Bay, Morayfield, Narangba and Upper Caboolture.

There are currently four independent schools in the area: Arethusa College and Kairos Community College (both located in Deception Bay), Carmichael College at Morayfield and Redwood College at Burpengary. Both Arethusa College and Kairos Community College cater for disengaged secondary students, while Redwood College offers distance education.

Carmichael College currently offers primary schooling. The school has approval to offer secondary schooling, commencing in 2020. In addition, Redwood College is approved to offer P–12 schooling.

In 2016 those three schools that were operational catered for 274 students (132 primary students and 142 secondary students).

Growth in student population

An additional 1,315 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

Highest need would be for secondary schooling places. Based on current levels of parental choice, independent schools would need to cater for:

- 622 primary school-aged children (47% of anticipated growth)
- 693 secondary school-aged children (53% of anticipated growth).

Location and timeframe for growth

Growth in the number of students attending an independent school is anticipated across five SA2s within this area.

Morayfield SA2 is anticipated to account for the highest proportion of growth (31%) in the number of students expected to attend independent schools, if parental choice is maintained (refer Map 10).

The next highest proportion of growth is expected in Narangba SA2 (29% of growth) followed by Upper Caboolture SA2 (21% of growth).

In each intercensal period (five-year period between each official population census), growth in the number of students accessing independent schools for primary and secondary schooling is expected (refer Table 12).

Growth in primary is anticipated to increase consistently over each intercensal period, with highest growth in the 2031–2036 period. The level of growth in secondary is anticipated to remain stable from 2016–2021 and 2021–2026. After this time higher growth is expected, with highest growth in the 2031–2036 period.

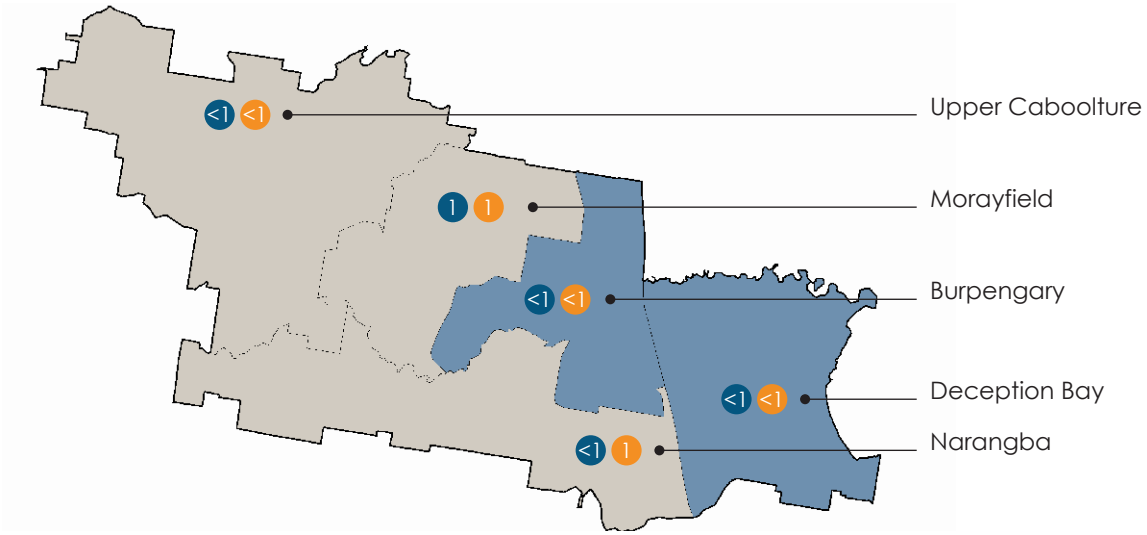
MAP 10: NARANGBA – BURPENGARY

Anticipated growth in school aged children in independent schools, 2016–2036

- 1,000–3,000
- 500–1,000
- 250–500
- 0–250
- -150–0

Number of additional streams supported 2016–2036

Primary (P) Secondary (S)



Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional three primary streams and three secondary streams.

Only one of the five SA2s, individually, would be able to support at least one full primary stream and at least one full secondary stream over the period 2016–2036 (refer Map 10). This is Morayfield SA2, which would sustain an additional one full primary stream and one full secondary stream (refer Map 10). Narangba SA2 would also be able to support one full secondary stream.

The number of primary and secondary streams required in intercensal periods is expected to range from none to three (refer Figure 15). No primary or secondary streams would be warranted in the 2016–2021 period, with one primary and one secondary stream supported in each of the following three intercensal periods.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

One new P–12 school would be needed, which would cater for two of the three primary streams and all three of the secondary streams projected for this area. The balance of one primary stream is assumed to be catered for by additional capacity being added to existing schools.

In total, based on cost-estimates presented earlier in the report, at current costs, approximately $48.2 million would be required to fund capital works in the Narangba – Burpengary SA3.

NEW SCHOOLS

The estimated cost for one new school is $44.5 million. This includes $5.4 million for 9 hectares of land (11% of total cost).

Projections suggest this additional school would be sustained in the 2031–2036 period.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

The additional learning spaces in existing schools needed to cater for one primary stream at existing schools is estimated to cost $3.6 million.

CASE STUDY

Nerang

The projected school-aged population in the Nerang SA3 area is expected to increase by 31% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	1,126
Primary streams	2
Secondary streams	3

CAPITAL WORKS REQUIREMENT

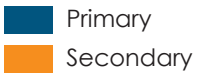
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
1 new P–12 school inc 9 hectares land	2	3	$44.5m
Learning spaces in existing schools	0	0	$0.0m
TOTAL	**2**	**3**	**$44.5m**

GROWTH OVERVIEW

TABLE 13: GROWTH BY INTERCENSAL PERIOD, NERANG SA3

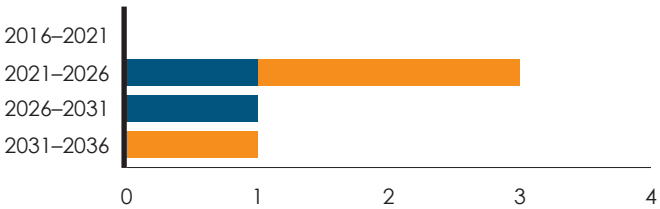
PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	86	102	188
2021–26	178	259	437
2026–31	127	169	296
2031–36	83	121	204
2016–36	**474**	**652**	**1,126**

Figure 16: NERANG 2016–2036



Distribution of anticipated growth, by schooling year level

Number of additional primary and secondary streams required, by timeframe



Area profile

Five SA2s comprise the Nerang SA3: Carrara, Highland Park, Nerang – Mount Nathan, Pacific Pines – Gaven and Worongary – Tallai.

There are currently four independent schools in the area: Australian International Islamic College, Emmanuel College and Silkwood School, all of which offer primary and secondary schooling, as well as Josiah College which caters for students with an autism spectrum disorder. Josiah College commenced in 2018.

In 2016 the three schools operating at that time catered for 2,138 students (1,142 primary students and 996 secondary students).

Growth in student population

An additional 1,126 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

Highest need would be for secondary schooling places. Based on current levels of parental choice, independent schools would need to cater for:

- 474 primary school-aged children (42% of anticipated growth).
- 652 secondary school-aged children (58% of anticipated growth).

Location and timeframe for growth

Growth in the number of students attending an independent school is anticipated across all five SA2s within this area.

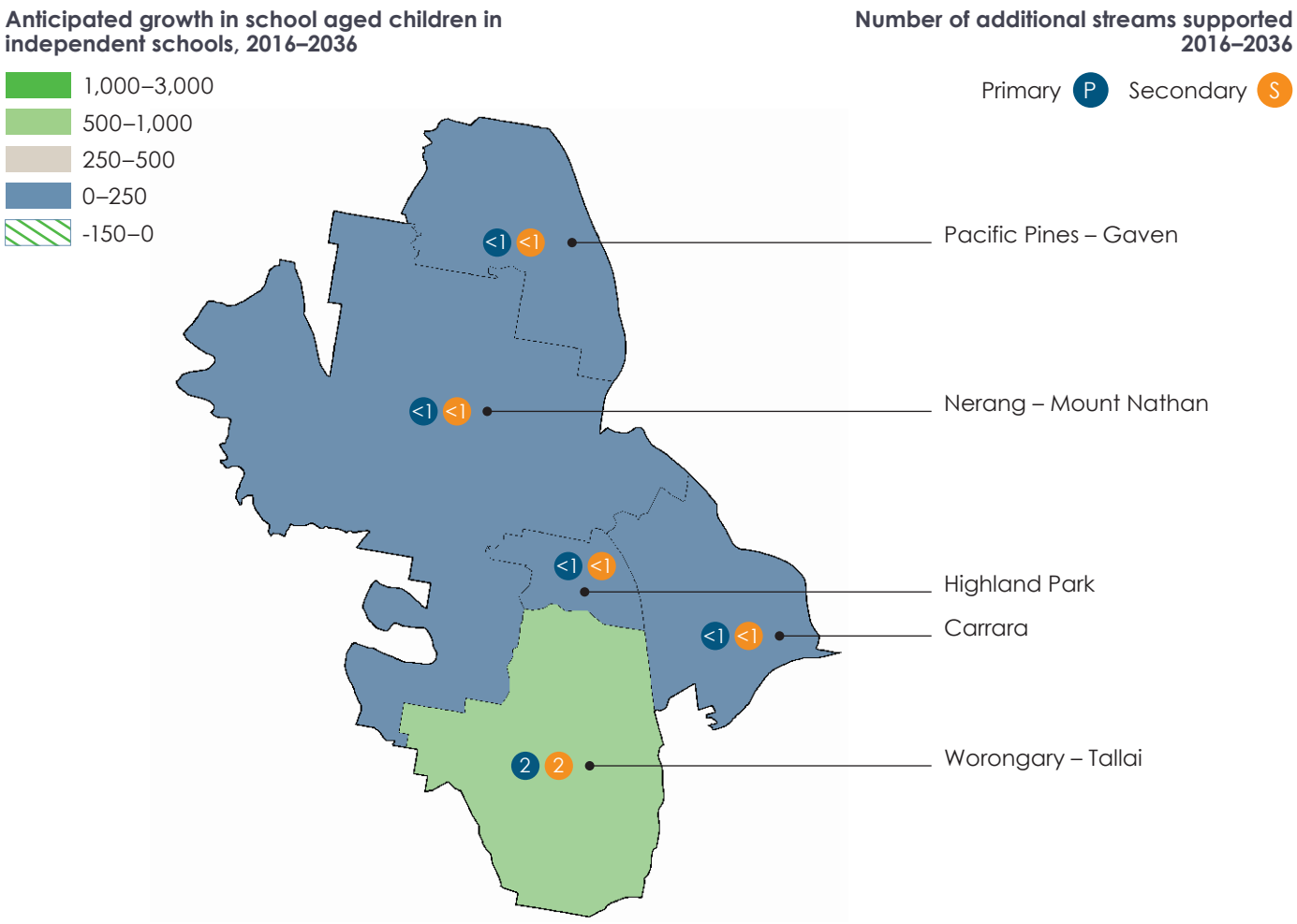
Worongary – Tallai SA2 is anticipated to account for the highest proportion of growth (71%) in the number of students expected to attend independent schools, if parental choice is maintained (refer Map 11).

The next highest proportion of growth is expected in Nerang – Mount Nathan SA2 (12% of growth).

In each intercensal period (five-year period between each official population census), growth in the number of students accessing independent schools for primary and secondary schooling is expected (refer Table 13).

The level of growth in primary is anticipated to increase significant between 2016–2021 and 2021–2026, followed by the level of growth decreasing over the following two intercensal periods. Similarly, the level of growth in secondary is anticipated to peak in the 2021–2026 period before reducing growth levels occurring in the 2026–2031 and 2031–2036 periods.

MAP 11: NERANG



Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional two primary streams and three secondary streams.

Only one of the five SA2s, individually, would be able to support at least one full primary stream and at least one full secondary stream over the period 2016–2036 (refer Map 11). This SA2 is Worongary – Tallai, which could support one full primary stream and one full secondary stream (refer Map 11).

The number of primary and secondary streams required in intercensal periods is expected to range from none to three (refer Figure 16). No primary or secondary streams would be warranted in the 2016–2021 period, while one primary stream and two secondary streams would be supported in the 2021–2026 period. One additional primary stream would be warranted in the 2026–2031 period, followed by one secondary stream in the 2031–2036 period.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

One new P–12 schools would be needed, which would cater for both primary streams and all three of the secondary streams projected for this area.

In total, based on cost-estimates presented earlier in the report, at current costs, approximately $44.5 million would be required to fund capital works in the Nerang SA3.

NEW SCHOOLS

The estimated cost for one new school is $44.5 million. This includes $5.4 million for 9 hectares of land (12% of total cost).

Projections suggest this additional school would be sustained in the 2031–2036 period.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

Existing schools would not need to cater for additional streams in primary or secondary.

CASE STUDY

Brisbane South

The projected school-aged population in the Brisbane South SA4 area is expected to increase by 19% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	1,841
Primary streams	3
Secondary streams	6

CAPITAL WORKS REQUIREMENT

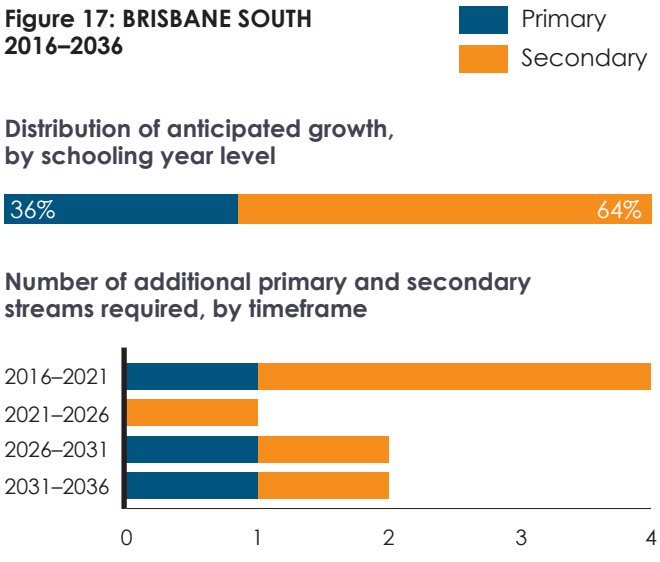
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
1 new P–12 school inc 9 hectares land	2	3	$44.5m
Learning spaces in existing schools	1	3	$17.7m
TOTAL	**3**	**6**	**$62.2m**

GROWTH OVERVIEW

TABLE 14: GROWTH BY INTERCENSAL PERIOD, BRISBANE SOUTH SA4

PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	279	552	831
2021–26	35	316	351
2026–31	100	42	142
2031–36	240	277	517
2016–36	**654**	**1,187**	**1,841**

Figure 17: BRISBANE SOUTH 2016–2036



Area profile

Five SA3s comprise the Brisbane South SA4: Carindale, Holland Park – Yeronga, Mount Gravatt, Nathan, Rocklea – Acacia Ridge and Sunnybank. These SA3s contain 34 SA2s: Algester, Annerley, Calamvale – Stretton, Camp Hill, Cannon Hill, Carina, Carina Heights, Carindale, Coopers Plains, Coorparoo, Eight Mile Plains, Fairfield – Dutton Park, Greenslopes, Holland Park, Holland Park West, Kuraby, Macgregor, Mansfield, Moorooka, Mount Gravatt, Pallara – Willawong, Parkinson – Drewvale, Robertson, Rochedale – Burbank, Rocklea – Acacia Ridge, Runcorn, Salisbury – Nathan, Sunnybank, Sunnybank Hills, Tarragindi, Upper Mount Gravatt, Wishart, Woolloongabba and Yeronga.

There are currently 16 independent schools in the area: Aboriginal & Islander Independent Community School, Australian International Islamic College (Buranda campus), Autism Queensland Education & Therapy Centre (Sunnybank), Brisbane Adventist College, Brisbane Christian College, Cannon Hill Anglican College, Carinity Education – Southside, Citipointe Christian College, Faith Christian School of Distance Education, Islamic College of Brisbane, Redeemer Lutheran College, Sinai College, Wisdom College, The Spot Academy, Yarranlea Primary School and a campus of YMCA Vocational School at Acacia Ridge.

The Spot Academy and YMCA Vocational School campus are Special Assistance Schools that commenced in 2018. Faith Christian School of Distance Education commenced offering day student enrolments in 2019.

In 2016 the 14 schools operating at that time catered for 7,334 students (3,843 primary students and 3,491 secondary students).

Growth in student population

An additional 1,841 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

Highest need would be for secondary schooling places. Based on current levels of parental choice, independent schools would need to cater for:

- 1,187 secondary school-aged children (64% of anticipated growth)
- 654 primary school-aged children (36% of anticipated growth).

Location and timeframe for growth

Growth in the number of students attending an independent school is anticipated across 31 of the 34 SA2s in the area, albeit only two SA2s are expected to cater for at least 100 additional students.

Rochedale – Burbank SA2 is anticipated to account for the highest proportion of growth (33%) in the number of students expected to attend independent schools, if parental choice is maintained (refer Map 12). Next highest proportion of growth is expected in Pallara – Willawong SA2 (11% of growth) followed by Upper Mount Gravatt and Cannon Hill SA2s (5% of growth each).

In each intercensal period, growth is expected in the number of students accessing independent schools for primary and

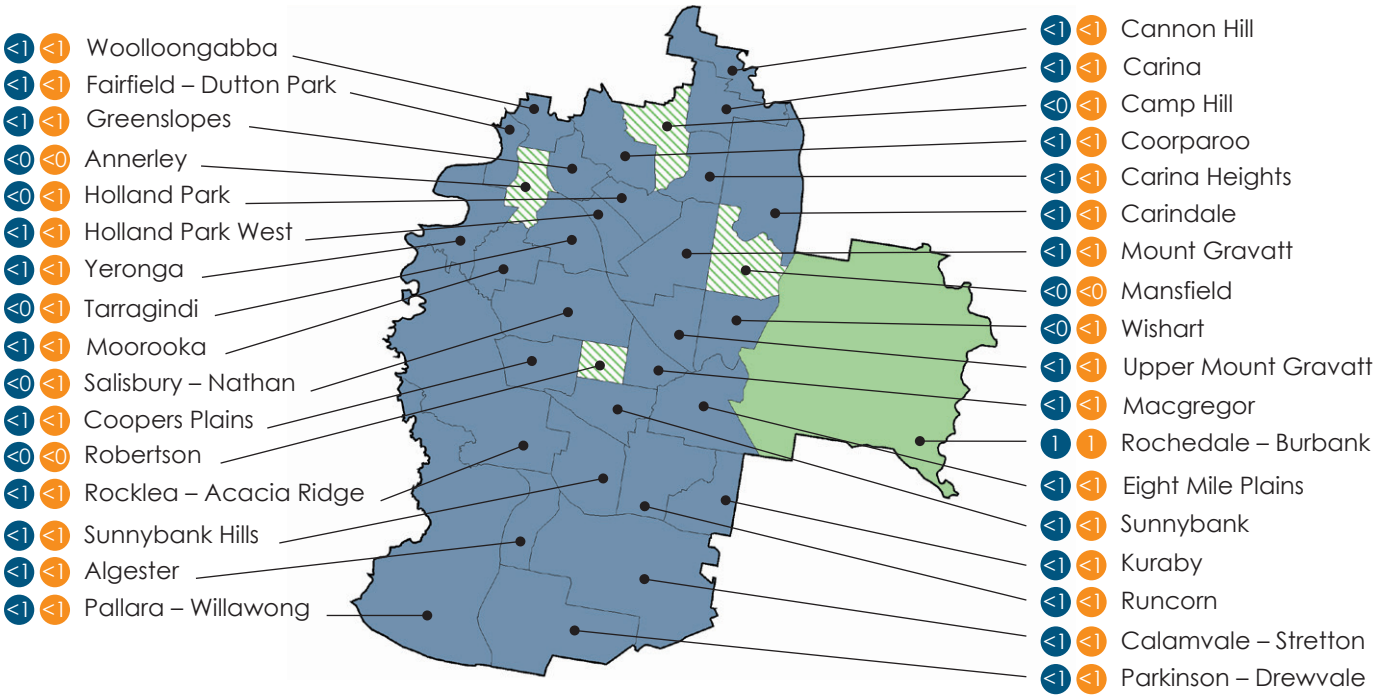
MAP 12: BRISBANE SOUTH

Anticipated growth in school aged children in independent schools, 2016–2036

- 1,000–3,000
- 500–1,000
- 250–500
- 0–250
- -150–0

Number of additional streams supported 2016–2036

Primary (P) Secondary (S)



secondary schooling, albeit the numbers of students reduce in each intercensal period through to 2031 (refer Table 14).

Growth in primary is anticipated to reduce from 279 students in the 2016–2021 period to a low of only 35 students in the 2021–2026 period. Modest and increasing growth is suggested in the subsequent intercensal periods. Highest growth in secondary would be expected in the 2016–2021 period, with growth reducing in the following two intercensal periods, with growth of only 42 secondary students suggested in the 2026–2031 period. In 2031–2036 higher growth is suggested, although not to the highest level expected to occur from 2016–2021.

Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional three primary streams and six secondary streams.

While 31 SA2s in the SA4 are expected to experience growth in the number of independent school students over time, only one SA2 would be expected to support at least one full primary stream, or at least one full secondary stream over the 2016–2036 period (refer Map 12). This SA2 is Rochedale – Burbank, which could support one full primary stream and one full secondary stream (refer Map 12).

The number of primary and secondary streams required in intercensal periods is expected to range from one to four (refer Figure 17). One primary and three secondary streams would be warranted in the 2016–2021 period, while one secondary stream would be supported in the 2021–2026 period. One additional primary and one additional secondary stream would be warranted in both the 2026–2031 and 2031–2036 periods.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained. One new P–12 school could be needed, which would cater for two of the three primary streams and three of the six secondary streams projected for this area. The balance of one primary stream and three secondary streams are assumed to be catered for by additional capacity being added to existing schools. It is estimated that approximately $62.2 million would be required to fund capital works in the Brisbane South SA4.

NEW SCHOOLS

The estimated cost for one new school is $44.5 million. This includes $5.4 million for 9 hectares of land (9% of total cost).

Projections suggest this additional school would be sustained in the 2026–2031 period.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

The additional learning spaces in existing schools needed to cater for one primary stream and three secondary streams at existing schools are estimated to cost $17.7 million.

CASE STUDY

Brisbane Inner City

The projected school-aged population in the Brisbane Inner City SA4 area is expected to increase by 27% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	2,034
Primary streams	1
Secondary streams	9

CAPITAL WORKS REQUIREMENT

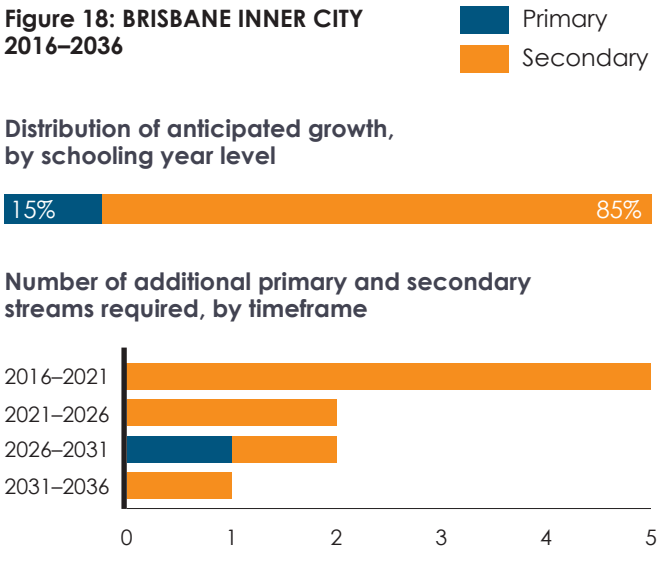
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
Learning spaces in existing schools	1	9	$45.8m
TOTAL	**1**	**9**	**$45.8m**

GROWTH OVERVIEW

TABLE 15: GROWTH BY INTERCENSAL PERIOD, BRISBANE INNER CITY SA4

PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	128	919	1,047
2021–26	37	398	436
2026–31	69	132	202
2031–36	75	275	350
2016–36	**309**	**1,725**	**2,034**

Figure 18: BRISBANE INNER CITY 2016–2036



Area profile

Four SA3s comprise the Brisbane Inner City SA4: Brisbane Inner, Brisbane Inner – East, Brisbane Inner – North and Brisbane Inner – West.

Together these SA3s contain 33 SA2s: Albion, Alderley, Ascot, Ashgrove, Auchenflower, Balmoral, Bardon, Brisbane City, Bulimba, Clayfield, East Brisbane, Fortitude Valley, Grange, Hamilton, Hawthorne, Hendra, Highgate Hill, Kangaroo Point, Kelvin Grove – Herston, Morningside – Seven Hills, New Farm, Newmarket, Newstead – Bowen Hills, Norman Park, Paddington – Milton, Red Hill, South Brisbane, Spring Hill, Toowong, West End, Wilston, Windsor and Wooloowin – Lutwyche.

There are currently 11 independent schools in the area: Angelorum College, Anglican Church Grammar School, Arethusa College, Brisbane Boys' College, Brisbane Girls Grammar School, Brisbane Grammar School, Clayfield College, Hubbard's School, Music Industry College, Somerville House and St Margaret's Anglican Girls School. Seven of these schools offer both primary and secondary schooling, while four schools offer secondary schooling.

In 2016 these schools catered for 9,439 students (2,055 primary students and 7,384 secondary students).

Growth in student population

An additional 2,034 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

Highest need would be for secondary schooling places. Based on current levels of parental choice, independent schools would need to cater for:

- 1,725 secondary school-aged children (85% of anticipated growth)
- 309 primary school-aged children (15% of anticipated growth).

Location and timeframe for growth

Growth in the number of students attending an independent school is anticipated across all 33 SA2s in the area.

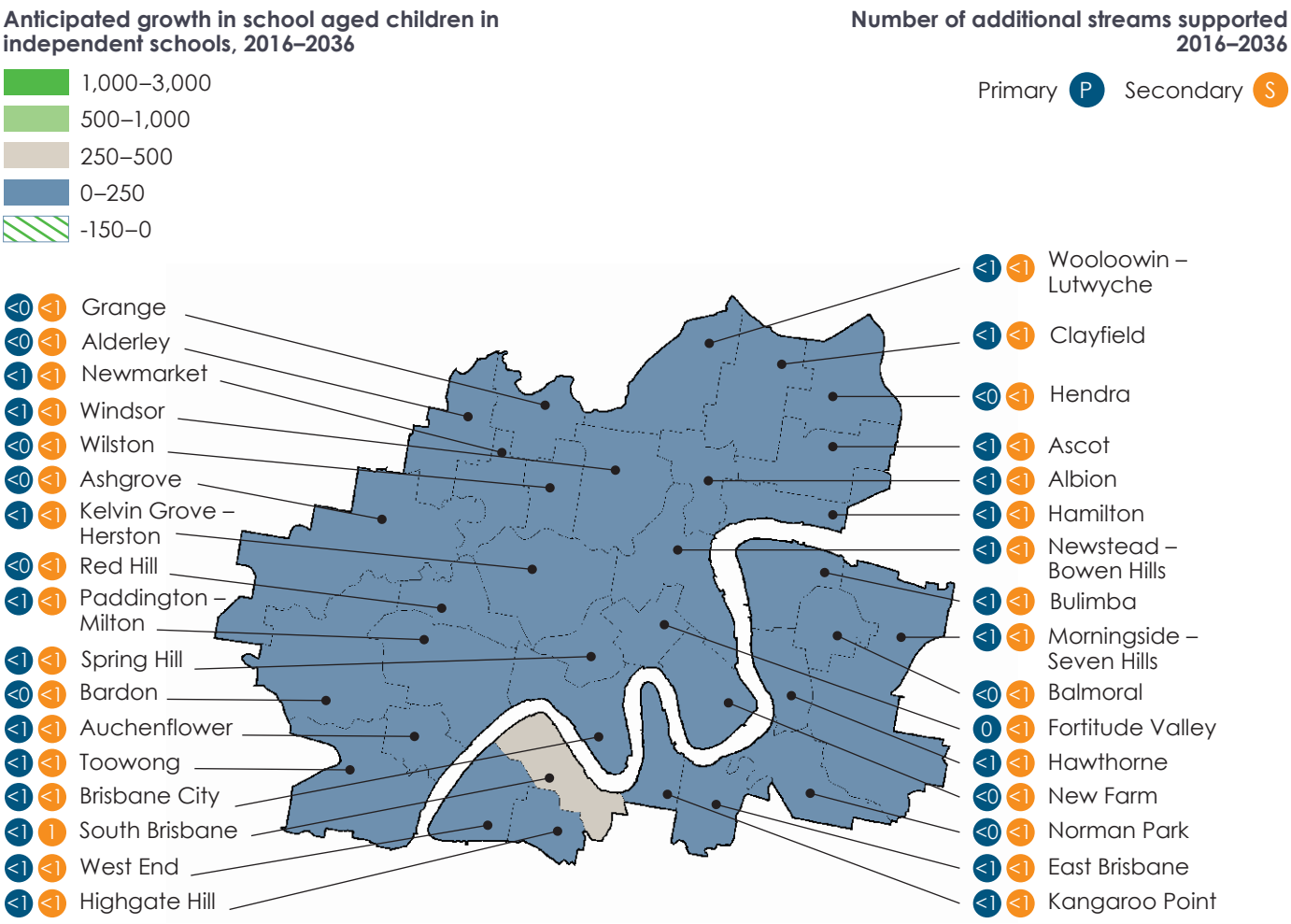
South Brisbane SA2 is anticipated to have the highest proportion of growth (17%) in the number of students expected to attend independent schools, if parental choice is maintained (refer Map 13).

The next highest proportion of growth is expected in Newstead – Bowen Hills SA2, accounting for 8% of growth, and West End (6% of growth).

In each intercensal period (five-year period between each official population census), growth is expected in the number of students accessing independent schools for primary and secondary schooling (refer Table 15).

With the exception of the 2016–2021 period where highest growth is expected in primary students, modest growth, suggestive of relative stability, is anticipated in other

MAP 13: BRISBANE INNER CITY



intercensal periods, Similarly, highest growth in secondary is anticipated from 2016–2021, with growth levels reducing through to 2026–2031. In the 2031–2036 period growth would increase, albeit not to higher levels experienced from 2016–2021 and 2021–2026.

Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support one additional primary stream and nine secondary streams.

While all 33 SA2s are expected to experience growth in the number of independent school students, no individual SA2 would be expected to support at least one full primary stream, while only one SA2, South Brisbane, would support one full secondary stream over the 2016–2036 period (refer Map 13).

The number of primary and secondary streams required in intercensal periods is expected to range from one to five (refer Figure 18). Five secondary streams would be warranted in the 2016–2021 period, while two secondary streams would be supported in the 2021–2026 period. One additional primary and one additional secondary stream would be warranted in 2026–2031, and one secondary stream in the 2031–2036 period.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

No new P–12 schools would be supported in this area, as the criteria for two streams of primary to be supported is not met. The balance of one primary stream and nine secondary streams are therefore assumed, for costing purposes, to be catered for by additional capacity being added to existing schools.

It is estimated that approximately $45.8 million would be required to fund capital works in the Brisbane inner City SA4.

NEW SCHOOLS

No new schools are assumed as being required in this SA4.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

The additional learning spaces in existing schools needed to cater for one primary stream and nine secondary streams at existing schools are estimated to cost $45.8 million.

CASE STUDY

NEW GROWTH AREA

Sunshine Coast Hinterland

The projected school-aged population in the Sunshine Coast Hinterland SA3 area is expected to increase by 64% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	1,151
Primary streams	3
Secondary streams	3

CAPITAL WORKS REQUIREMENT

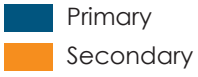
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
1 new P–12 school inc 9 hectares land	2	3	$44.5m
Learning spaces in existing schools	1	0	$3.6m
TOTAL	**3**	**3**	**$48.2m**

GROWTH OVERVIEW

TABLE 16: GROWTH BY INTERCENSAL PERIOD, SUNSHINE COAST HINTERLAND SA3

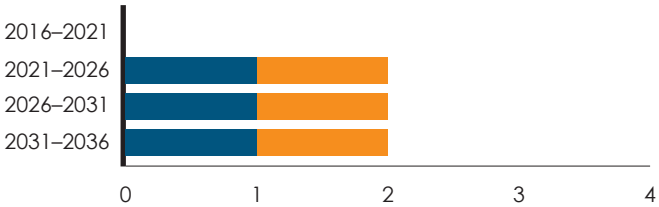
PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	102	167	269
2021–26	131	118	248
2026–31	182	112	294
2031–36	167	173	340
2016–36	**581**	**570**	**1,151**

Figure 19: SUNSHINE COAST HINTERLAND 2016–2036



Distribution of anticipated growth, by schooling year level

Number of additional primary and secondary streams required, by timeframe



Area profile

Six SA2s comprise the Sunshine Coast Hinterland SA3: Beerwah, Caloundra Hinterland, Glass House Mountains, Landsborough, Maroochy Hinterland and Palmwoods.

There are currently four independent schools in this area: Blackall Range Independent School and Glasshouse Christian College, both of which offer P–12 schooling, The River School which offers primary schooling, and Maleny Independent School which offers Years 7–9 schooling. This latter school opened in 2018.

In 2016 the three schools operating at that time catered for 1,205 students (719 primary students and 486 secondary students).

Growth in student population

An additional 1,151 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

A similar number of additional primary and secondary school places would be required. Based on current levels of parental choice, independent schools would need to cater for:

- 581 primary school-aged children (50% of anticipated growth)
- 570 secondary school-aged children (50% of anticipated growth).

Location and timeframe for growth

Growth in the number of students attending an independent school is anticipated in four of the six SA2s in the area, with very slight decreases in school-aged children numbers, indicative of stability, anticipated in Caloundra Hinterland and Maroochy Hinterland (refer Map 14).

Landsborough SA3 is anticipated to account for the highest proportion of growth (79% of growth) in the number of students expected to attend independent schools. Next highest proportion of growth is expected in Beerwah SA2 (12% of growth).

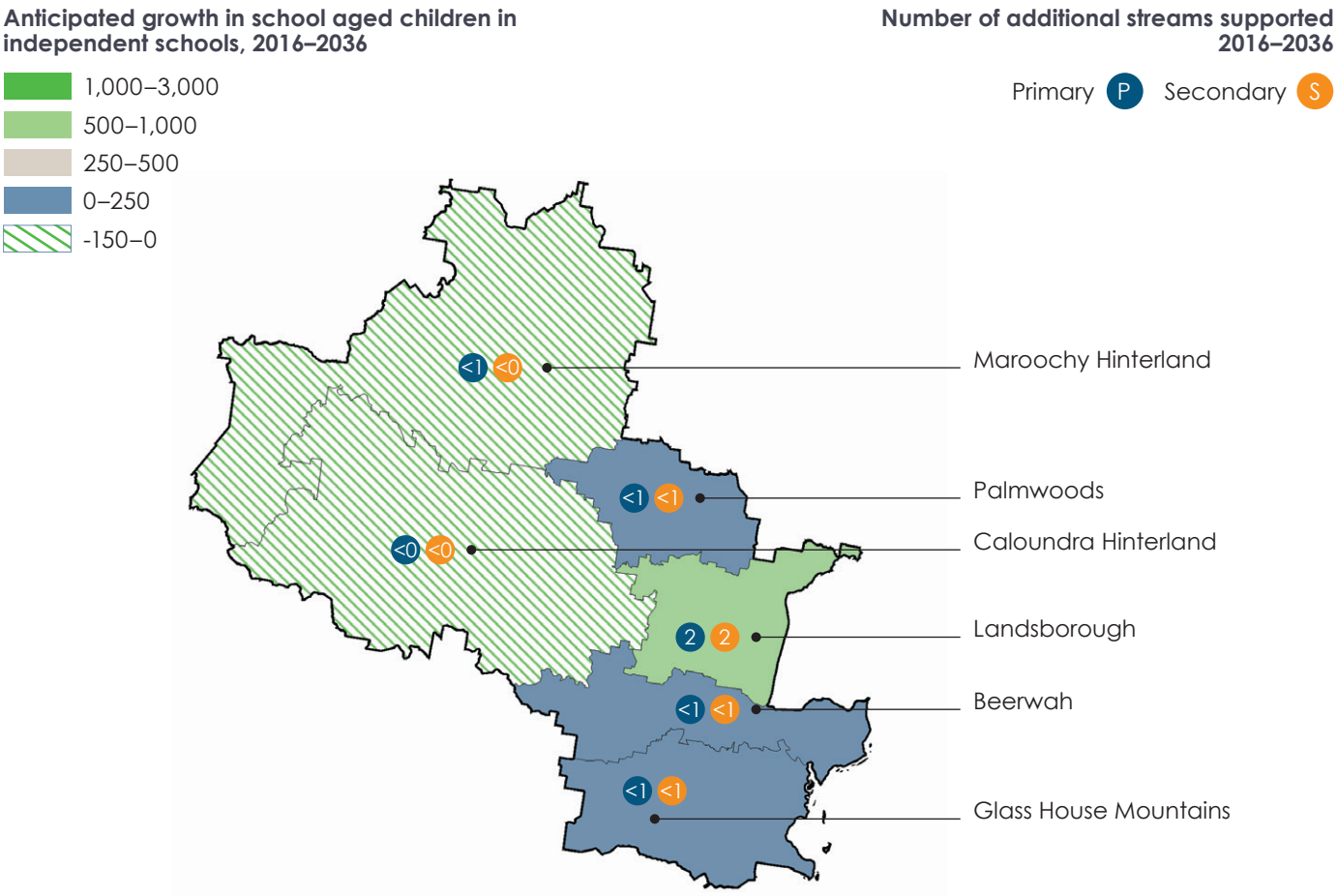
In each intercensal period (five-year period between each official population census), growth in the number of students accessing independent schools for primary and secondary schooling is expected (refer Table 16).

Modest growth in primary demand is anticipated in each intercensal period through to 2031–2036, with highest growth expected from 2026–2031. Highest growth in secondary is anticipated in the 2016–2021 period, and the 2031–2036 period.

Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional three primary streams and three secondary streams.

MAP 14: SUNSHINE COAST HINTERLAND



Only Landsborough SA2 would be expected to support at least one full primary stream and at least one full secondary stream over the period 2016–2036 (refer Map 14). Landsborough SA2 would sustain an additional two full primary streams and two full secondary streams (refer Map 14).

The number of primary and secondary streams required in intercensal periods is expected to range from none to two (refer Figure 19). No primary or secondary streams would be warranted in the 2016–2021 period, with one primary and one secondary stream supported in each of the following three intercensal periods.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

One new P–12 schools would be needed, which would cater for two of the three primary streams and all of the three secondary streams projected for this area. The balance of one primary stream is assumed to be catered for by additional capacity being added to existing schools.

In total, based on cost-estimates presented earlier in the report, at current costs, approximately $48.2 million would be required to fund capital works in the Sunshine Coast Hinterland SA3.

NEW SCHOOLS

The estimated cost for one new school is $44.5 million. This includes $5.4 million for 9 hectares of land (11% of total cost).

Projections suggest an additional school would be sustained in the 2031–2036 period.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

The additional learning spaces in existing schools needed to cater for one primary stream at existing schools is estimated to cost $3.6 million.

CASE STUDY

NEW GROWTH AREA

North Lakes

The projected school-aged population in the North Lakes SA3 area is expected to increase by 60% over the 20 years from 2016–2036.

AT A GLANCE

To maintain independent school parental choice over the period:

ADDITIONAL REQUIREMENT	NUMBER
Total student places	1,466
Primary streams	3
Secondary streams	4

CAPITAL WORKS REQUIREMENT

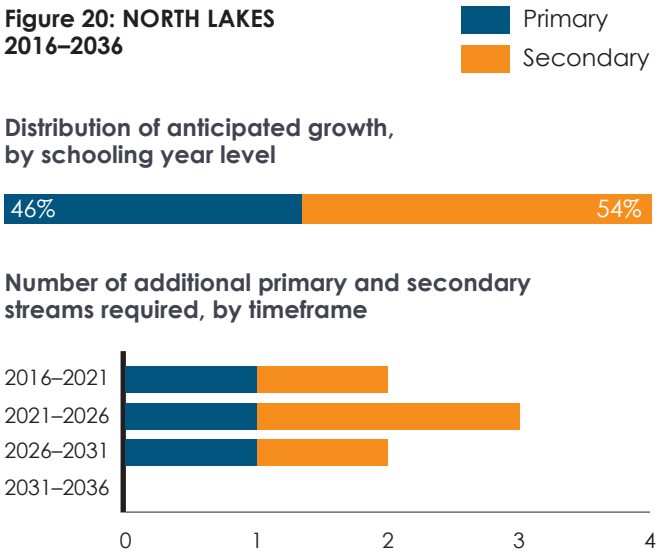
	STREAMS CATERED FOR		
INFRASTRUCTURE REQUIRED	PRIMARY	SECONDARY	(EST) COST
1 new P–12 school inc 9 hectares land	2	3	$44.5m
Learning spaces in existing schools	1	1	$8.3m
TOTAL	**3**	**4**	**$52.8m**

GROWTH OVERVIEW

TABLE 17: GROWTH BY INTERCENSAL PERIOD, NORTH LAKES SA3

PERIOD	PRIMARY	SECONDARY	TOTAL
2016–21	349	355	703
2021–26	160	293	453
2026–31	116	108	224
2031–36	49	37	86
2016–36	**674**	**792**	**1,466**

Figure 20: NORTH LAKES 2016–2036



Area profile

Three SA2s comprise the North Lakes SA3: Dakabin – Kallangur, Murrumba Downs – Griffin and North Lakes – Mango Hill.

There are currently five independent schools in the area: Charlotte Mason College at Kallangur, Living Faith Lutheran Primary School at Murrumba Downs, Northpine Christian College at Dakabin, and The Lakes College and a campus of YMCA Vocational School (North Lakes).

Charlotte Mason College commenced in 2018, offering day and distance education.

In 2016 those four schools that were operational catered for 2,096 students (1,473 primary students and 623 secondary students).

Growth in student population

An additional 1,466 school-aged children are projected to attend an independent school from the area in the period 2016–2036. This projection is based on:

- projected growth in the school-aged population
- maintenance of the proportion of parents choosing an independent school.

Highest need would be for secondary schooling places. Based on current levels of parental choice, independent schools would need to cater for:

- 674 primary school-aged children (46% of anticipated growth)
- 792 secondary school-aged children (54% of anticipated growth).

Location and timeframe for growth

Growth in the number of students attending an independent school is anticipated across all three SA2s within this area.

North Lakes – Mango Hill SA2 is anticipated to account for the highest proportion of growth (46%) in the number of students expected to attend independent schools, if parental choice is maintained (refer Map 15).

The next highest proportion of growth is expected in Murrumba Downs – Griffin SA2 (33% of growth), with the balance of 21% of growth anticipated in Dakabin – Kallangur SA2.

In each intercensal period (five-year period between each official population census), growth in the number of students accessing independent schools for primary and secondary schooling is expected (refer Table 17).

The level of growth in primary is anticipated to decrease consistently over each intercensal period, with highest growth in the 2016–2021 period. Similarly, the level of growth in secondary is anticipated to reduce consistently from 2016 to 2031 to 2036. In the case of both primary and secondary the level of growth experienced in the 2031–2036 period is expected to be slight, reflective of relative stability.

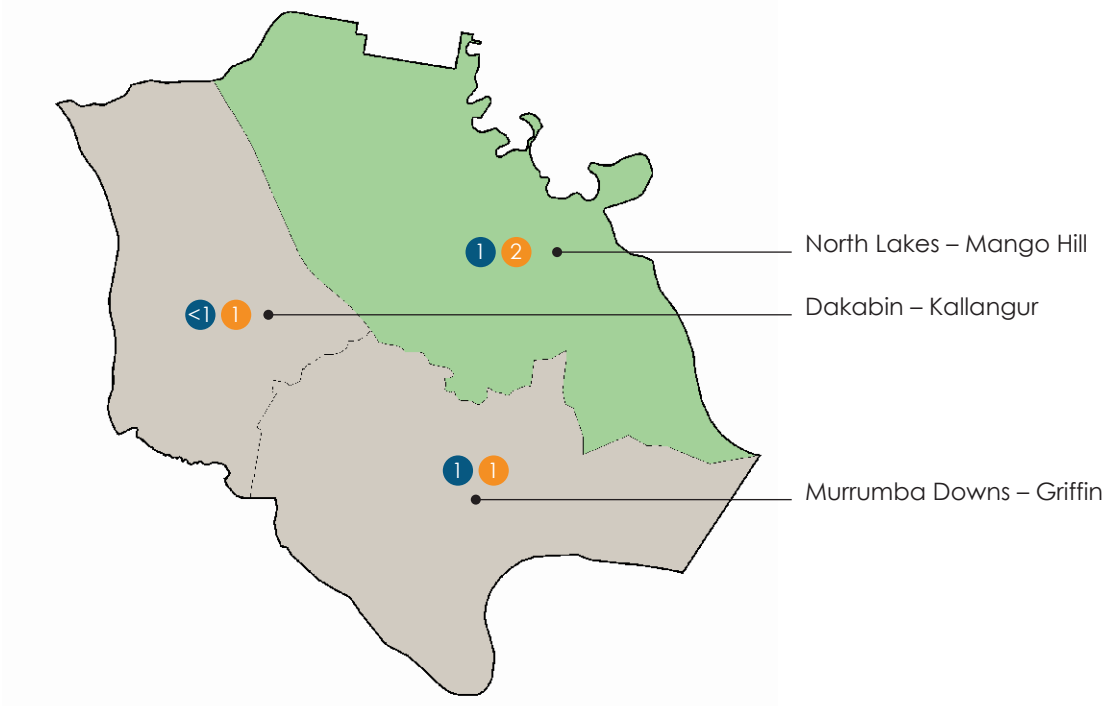
MAP 15: NORTH LAKES

Anticipated growth in school aged children in independent schools, 2016–2036

- 1,000–3,000
- 500–1,000
- 250–500
- 0–250
- -150–0

Number of additional streams supported 2016–2036

Primary (P) Secondary (S)



Additional capacity needed to meet demand

Over the 20-year period, this SA3 area is indicated as being able to support an additional three primary streams and four secondary streams.

Two of the three SA2s, individually, would be able to support at least one full primary stream and at least one full secondary stream over the period 2016–2036 (refer Map 15). North Lakes – Mango Hill SA2 would sustain an additional one full primary stream and two full secondary streams, while Murrumba Downs – Griffin would support one full primary stream and one full secondary stream (refer Map 15). Dakabin – Kallangur SA2 would also be able to support one full secondary stream.

The number of primary and secondary streams required in intercensal periods is expected to range from none to three (refer Figure 20). In the 2016–2021 period, one primary stream and one secondary stream would be supported, followed by one primary stream and two secondary streams in the 2021–2026 period and one primary stream and one secondary stream in the 2026–2031 period. No primary or secondary streams would be warranted in the 2031–2036 period.

Infrastructure and cost implications

It is assumed new schools are established when an additional two primary streams and three secondary streams are sustained.

One new P–12 school would be needed, which would cater for two of the three primary streams and three of the four secondary streams projected for this area. The balance of one primary stream and one secondary stream is assumed to be catered for by additional capacity being added to existing schools.

In total, based on cost-estimates presented earlier in the report, at current costs, approximately $58.2 million would be required to fund capital works in the North Lakes SA3.

NEW SCHOOLS

The estimated cost for one new school is $44.5 million. This includes $5.4 million for 9 hectares of land (10% of total cost).

Projections suggest this additional school would be sustained in the 2021–2026 period.

ADDITIONAL STREAMS IN EXISTING SCHOOLS

The additional learning spaces in existing schools needed to cater for one primary stream and one secondary stream at existing schools is estimated to cost $8.3 million.

Conclusion

Projections for school-aged population point to continued strong demand for new schools. If the level of parental choice in schooling is to be maintained, there will be significant implications for all sectors to meet the greater supply burden, including the Queensland Government.

The detailed research and analysis undertaken by Independent Schools Queensland provides a conservative perspective on the quantity and estimated costs of new independent schools, and additional school capacity, that will be required to maintain current levels of participation in independent schooling over the next 20 years to 2036.

The research quantifies the future infrastructure need and estimated cost at $1.25 billion for:

- 21 new independent schools, based on a "typical" P–12 independent school of two streams of primary and three streams of secondary, which is about 925 students.
- 622 additional classrooms to accommodate 31 additional streams of primary education and 43 streams of secondary in existing independent schools.

The most recent data indicates sizeable growth in secondary schooling over the 20-year period to 2036. With secondary infrastructure costs at their highest, this growth has significant implications for the Queensland independent sector, which has the highest participation rate of secondary school students.

Projections indicate that a high proportion of expenditure of the estimated $1.25 billion will be required over the first two intercensal periods (2016–2021, 2021–2026), with the highest proportion required from 2021–2026. In 2019, three years of this 10-year period have already passed, without the much-needed additional funding.

The Queensland independent school sector makes a significant contribution to building social infrastructure with about 80% of capital costs met by parents. The $1.25 billion required in additional expenditure over existing levels will be a significant barrier for the sector in providing the required facilities. Additional government financial assistance is critical to meet this significant increase in demand to maintain parental choice.

The Government should also consider other mechanisms to facilitate new independent schools in high growth areas including interest subsidies on borrowing to develop new schools, loan guarantees and increased subsidies for external infrastructure charges associated with the development of new schools.

More attention on public policy settings in relation to planning is required. Land use planning needs to ensure an adequate supply of suitably zoned sites is made to promote the timely, cost-effective build of well-located schools, both state and non-state. Inadequate access to such sites has been, and still is, a significant restraining factor on infrastructure investment by the independent school sector.

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