

PERTH AND KINROSS COUNCIL
LEARNING AND FAMILIES COMMITTEE

2 NOVEMBER 2022

SCHOOL ESTATE TRANSFORMATION PROGRAMME – UPDATE

Report by Executive Director (Education and Children's Services)
(Report No. 22/263)

1. PURPOSE

- 1.1 The purpose of this report is to provide an update on the progress made to date, and the work which remains in progress, in relation to Phase 1 and Phase 2 of the current School Estate Transformation Programme. Additionally, this report seeks direction on a future transformation programme.
- 1.2 Since the establishment of the School Estate Transformation Programme, significant work has been undertaken within Phase 1 and Phase 2, although not all resultant work has been completed.
- 1.3 We have clarity of direction and decisions have been made on the remaining work identified as part of Phase 1 and Phase 2 and this is detailed within this report.
- 1.4 Given the approval at Full Council on 6 March 2020 of the Investment Blueprint ([Report No. 20/58 refers](#)), it would be appropriate that a review of all schools be undertaken in line with the principles set out in the Blueprint to determine the scale and scope of any future School Estate Transformation Programme. As such, the previously proposed Phase 3 of the School Estate Transformation Programme should be considered as being concluded.

| | |
|-----------|-----------------------|
| 2. | RECOMMENDATION |
|-----------|-----------------------|

- | | |
|-----|---|
| 2.1 | <p>It is recommended that the Committee:</p> <ul style="list-style-type: none">• Notes the update and completion of Phase 1 and Phase 2 of the School Estate Transformation Programme; and• Approves the Executive Director (Education and Children's Services) plan a review of the school estate in line with the principles of the approved Investment Blueprint and Financial Strategy; and bring an update on that work back to the Committee in August 2023. |
|-----|---|

3. STRUCTURE OF REPORT

- 3.1 This report is structured over the following sections:
- Section 4: Background
 - Section 5: Options Appraisals Updates

- Section 6: Current Position
- Section 7: Phase 3
- Section 8: Investment Blueprint
- Section 9: Proposals

4. BACKGROUND

- 4.1 The Council's Transformation Strategy 2015-2020 'Building Ambition' and Organisational Development Framework ([Report No. 15/292 refers](#)) were approved by Council on 1 July 2015.
- 4.2 On 24 August 2016, Lifelong Learning Committee approved the principles to be used as a basis for the transformation review, 'Securing the Future of the School Estate' ([Report No. 16/347 refers](#)). The principles approved by Lifelong Learning Committee, as a basis for the transformation review, were as follows:
 - Schools should have an occupancy rate, where possible, greater than 60% of the capacity and ideally should be operating at over 80%;
 - Every school should be rated as A or B, ie at least satisfactory for condition and suitability; and
 - Life expired buildings within the school estate should be prioritised for replacement.
- 4.3 On 2 November 2016, Lifelong Learning Committee approved the development of a number of options appraisals, to consider in detail, schools which were identified as requiring further consideration ([Report No. 16/485 refers](#)).
- 4.4 On 30 September 2020, the Council approved an Investment Blueprint and Capital Budget 2020/21 – 2028/29 ([Report No. 20/175 refers](#)). This report approved the development of a long-term Investment Blueprint to inform and guide future capital decision making and set out our ambitions and aspirations for Perth and Kinross.
- 4.5 The Learning Estate is a significant and valuable asset to the communities of Perth and Kinross. Perth and Kinross Council has invested £95m since 2015/2016, and between 2022 and 2028, the Council will invest a further £190m in the Learning Estate.
- 4.6 On 3 November 2021, The Learning Estate Strategy ([Report No. 21/202 refers](#)) was approved at Lifelong Learning Committee. It sets out the Council's aspirations for our schools, and in particular, the high value we place on learning, through our vision for well designed, maintained and managed schools.
- 4.7 It is important, in light of the significant investment and costs associated with the Learning Estate, that it is managed in an efficient and effective manner, and that the priorities which are addressed meet the wider strategic objectives of the Council and the needs of our communities.

- 4.8 There are significant challenges for managing the Learning Estate over the coming years.

These include changing demographics, including population growth and movement, housebuilding in certain locations, ongoing deterioration in building infrastructure, pressure on planned maintenance budgets, increasing revenue costs and net zero climate targets.

- 4.9 On 22 June 2022, the Council set a new five year Transformation and Change Strategy 2022/23 - 2027/28 ([Report No. 22/142 refers](#)) which sets out the next phase of transformation, which sits within the Council's wider strategic framework, and acts as an enabler to deliver on corporate objectives.

5. OPTIONS APPRAISALS UPDATES

- 5.1 The development of the options appraisals has been undertaken on a phased basis. Outcomes of the programme to date are detailed in Table 1 below:

Table 1 - Update of Completed Works Phase 1

| Transformation Project | Outcome/Current Status | Committee Approval |
|---|---|--------------------|
| Blairingone Primary School - Phase 1 | Blairingone Primary School was permanently closed on 28 June 2019 due to low pupil numbers. The school roll was 5 pupils. Catchment area permanently rezoned to Fossoway Primary School. | 27 March 2019 |
| Forteviot Primary School - Phase 1 | Forteviot Primary School was permanently closed on 28 June 2019 due to low pupil numbers. At the time of closure there were 0 pupils in attendance and the school was therefore mothballed. Catchment area permanently rezoned to Forgandenny Primary School. | 31 October 2018 |
| Greenloaning Primary School - Phase 1 | Greenloaning Primary School was permanently closed on 28 June 2019 due to low pupil numbers. At the time of closure there were 0 pupils in attendance and the school was therefore mothballed. Catchment area permanently rezoned to Braco Primary School. Investment in Braco Primary School is planned. | 27 March 2019 |
| Logiealmond Primary School – Phase 1 | Logiealmond Primary School remained open. The occupancy has been reviewed and the school currently has 10 ¹ pupils | 21 March 2018 |
| St. Ninian's Episcopal Primary School - Phase 1 | Project to provide a nursery class is complete. Capacity revised from 150 | 24 January 2018 |

¹ As at 6 September 2022.

| Transformation Project | Outcome/Current Status | Committee Approval |
|---|---|---------------------------|
| | pupils to 99 pupils as a result of building works which utilised a classroom space. | |
| Grandtully Primary School - Phase 2 | Education provision continues at Grandtully Primary School as the increased pupil roll is likely to be sustained. | 27 March 2019 |
| Logierait Primary School - Phase 2 | Project to provide a nursery class with a view to making the school roll more sustainable is complete. | 4 September 2019 |

5.2 Ongoing Projects

Table 2 below details the position regarding ongoing work being carried out in the programme:

Table 2 – Ongoing Projects

| Transformation Project | Phase | Outcome/Current Status |
|---|--------------|---|
| Abernyte Primary School | Phase 1 | School capacity of 44 pupils to be maintained. Statutory Consultation has been undertaken on a proposal to amend the catchment area to include the area currently within Inchtute Primary School catchment area north of the A90. A report on this is presented to the Learning & Families Committee on 2 November 2022 for a decision. |
| Balhousie Primary School/North Muirton Primary School | Phase 1 | A new school to replace both Balhousie Primary School and North Muirton School is currently being built on the site of North Muirton Primary School. The new school, Riverside Primary School, is anticipated to be completed in April 2023. |
| Braco Primary School | Phase 1 | Feasibility studies have been developed which considered the refurbishment and extension of the existing school and for a new school on another site. Negotiations continue for the purchase of land which would see a new school building on an alternative site with a desired opening of the school taking place in 2025. |
| Cleish Primary School | Phase 2 | Further detailed analysis is being carried out for improving the condition and suitability with some works to take place summer 2023. Detailed design work on the most recent feasibility study will be taken forward and then definitive proposals for the main project will be brought back to the appropriate Committee. |
| Methven Primary School | Phase 1 | Project to replace the gym/PE facilities to improve the condition of Methven Primary School is ongoing. Enablement work has been undertaken and full |

| Transformation Project | Phase | Outcome/Current Status |
|---|---------|---|
| | | design work for the hall has commenced. The target delivery date for the new hall is 2025. The capacity will be reduced from 229 to 176 pupils following completion of the project. |
| Pitlochry High School | Phase 2 | <p>Proposals are being developed to maximise wider community use of Pitlochry High School and to evaluate property and community facilities in conjunction with other services and partners.</p> <p>A scoping exercise on the possibility of making Kirkmichael Primary School catchment area a dual secondary school catchment area for both Pitlochry High School and Blairgowrie High School was undertaken. Following this exercise, Lifelong Learning Committee approved the retention of the existing secondary catchment arrangements.</p> <p>A feasibility study was completed in May 2022 to provide options for consideration in terms of accommodation use and facilities for Perth College UHI and the wider community. The outcomes of the feasibility study are being considered.</p> |
| Ruthvenfield Primary School/ Strategic Sites ² | Phase 2 | <p>A new, additional, primary school is to be built to provide capacity for pupils from the strategic sites being progressed to the north and northwest of Perth. The new primary school will consist of 14 classrooms along with a nursery and Intensive Support Provision. Associated ancillary support spaces will also be provided.</p> <p>A Statutory Consultation has been undertaken in respect of the establishment of the school, new catchment areas proposed, and associated changes required by the Schools Consultation (Scotland) Act 2010. Ruthvenfield Primary School will continue to operate from their existing building at this time with a new catchment area created and the condition of the building improved.</p> |

6. CURRENT POSITION

² It should be noted that sites have been identified in Almond Valley and Perth West as locations for future primary schools. Whether, and when, these schools are required and developed in future years will be determined by the build out of housing and the number of pupils generated from this housing. Any new school will require its own catchment area and therefore a review and a Statutory Consultation will be required prior to any new school being built.

- 6.1 The School Estate Transformation Programme is ongoing as detailed in Section 5.2 of this report. There are actions that Education and Children's Services still require to take forward/develop as part of Phase 1 and Phase 2 of the Transformation Programme.

7. PHASE 3

- 7.1 There are seven schools which were previously identified for Phase 3 of the programme. Table 3 below details these schools and the reasons why these schools were originally included within the transformation programme:

Table 3 - Phase 3 Schools

| School | Reason(s) |
|-----------------------------|--|
| Balbeggie Primary School | An options appraisal to be developed to consider the under occupancy. |
| Collace Primary School | An options appraisal to be developed to consider the under occupancy and life expired buildings. |
| Coupar Angus Primary School | An options appraisal to be developed to consider the under occupancy. |
| Glendelvine Primary School | An options appraisal to be developed to consider the under occupancy. |
| Kettins Primary School | An options appraisal to be developed to consider the under occupancy and life expired buildings. |
| Meigle Primary School | An options appraisal to be developed to consider the under occupancy and life expired buildings. |
| Stanley Primary School | An options appraisal to be developed which will consider the under occupancy. |

8. INVESTMENT BLUEPRINT

- 8.1 Since the development of the School Estate Transformation Programme in 2015/16, the Council has approved a 30-year Investment Blueprint ([Report No. 20/58 refers](#)).
- 8.2 The Investment Blueprint will consider all identified strategic drivers and how these are likely to drive our investment decisions. Through its flexible strategic approach, the Investment Blueprint will support the development of the Perth and Kinross Offer.
It will also provide a framework to develop inclusive growth and a vibrant economy, support our focus on climate change, delivery on the National Performance Framework, Infrastructure Commission and any other national policy initiatives.
- 8.3 It will be developed as an investment delivery plan from the blueprint and will be a flexible 5-year programme. The Investment Blueprint will demonstrate the Council's ongoing commitment to securing the best outcomes for all its citizens and be in accordance with best practice in strategic investment thinking and place Perth and Kinross Council as a sector leading authority.
- 8.4 Strategies around asset management planning of the Learning Estate will link into this Investment Blueprint and allow Perth and Kinross Council to assess its wider buildings portfolio on an ongoing basis.
- 8.5 This approach will also align with the new 5-year Transformation and Change Strategy 2022/23 - 2027/28 as detailed in this report which sits within the Council's wider strategic framework and acts as an enabler to deliver on corporate objectives.
- 8.6 The Investment Blueprint will ensure that capital investment fits with delivery of the Perth and Kinross Offer and is responsive to the changing needs within our communities.

9. PROPOSALS

- 9.1 Since the establishment of the School Estate Transformation Programme, significant work has been undertaken within Phase 1 and Phase 2, although not all resultant work has been completed.
- 9.2 We have clarity of direction and decisions have been made on remaining work identified as part of Phase 1 and Phase 2.
- 9.3 The schools previously identified under Phase 3 of the School Estate Transformation Programme will now be considered along with all other schools within the Learning Estate as part of any wider review which would be determined by the principles of the Investment Blueprint and the Learning Estate Management Plan.
- 9.4 If agreed that the current programme be concluded, a new plan to review the school estate will be brought back to this Committee in August 2023. In

addition to this, future projects may still be considered as part of the normal asset management planning process and reported on through the appropriate governance framework.

Authors

| Name | Designation | Contact Details |
|------------|--------------------------------------|--|
| Brian Reid | Service Manager, Resource Management | ECSCCommittee@pkc.gov.uk 07138 475000 |

Approved

| Name | Designation | Date |
|---------------|--|-----------------|
| Sheena Devlin | Executive Director (Education and Children's Services) | 24 October 2022 |

If you or someone you know would like a copy of this document in another language or format, (on occasion, only a summary of the document will be provided in translation), this can be arranged by contacting the Customer Service Centre on 01738 475000.

You can also send us a text message on 07824 498145.

All Council Services can offer a telephone translation facility.

1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

| Strategic Implications | Yes/None |
|---|-----------------|
| Community Plan/Single Outcome Agreement | Yes |
| Corporate Plan | Yes |
| Resource Implications | |
| Financial | Yes |
| Workforce | Yes |
| Asset Management (land, property, IST) | Yes |
| Assessments | |
| Equality Impact Assessment | No |
| Strategic Environmental Assessment | No |
| Sustainability (community, economic, environmental) | No |
| Legal and Governance | No |
| Risk | No |
| Consultation | |
| Internal | Yes |
| External | No |
| Communication | |
| Communications Plan | Yes |

1. Strategic Implications

Community Plan/Single Outcome Agreement

- 1.1 This section sets out how the proposals relate to the delivery of the Perth and Kinross Community Plan/Single Outcome Agreement in terms of the following priorities:

- (i) Giving every child the best start in life;
- (ii) Developing educated, responsible and informed citizens;
- (iii) Promoting a prosperous, inclusive and sustainable economy;
- (iv) Supporting people to lead independent, healthy and active lives; and
- (v) Creating a safe and sustainable place for future generations.

This report relates to all of these objectives.

Corporate Plan

- 1.2 This section sets out how the proposals relate to the achievement of the Council's Corporate Plan Objectives:

- (i) Giving every child the best start in life;
- (ii) Developing educated, responsible and informed citizens;
- (iii) Promoting a prosperous, inclusive and sustainable economy;
- (iv) Supporting people to lead independent, healthy and active lives; and
- (v) Creating a safe and sustainable place for future generations.

This report relates to all of these objectives.

- 1.3 The report also links to the Education & Children's Services Vision, Values and Priorities in respect of the following key Priority area:

- Learning and Achievement

2. Resource Implications

Financial

- 2.1 There are financial implications associated with the projects detailed in the main body of the report.

Workforce

- 2.2 There are no workforce implications.

Asset Management (land, property, IT)

- 2.3 There are no asset management implications other than those noted in the main body of the report.

3. Assessments

Equality Impact Assessment

- 3.1 Under the Equality Act 2010, the Council is required to eliminate discrimination, advance equality of opportunity, and foster good relations between equality groups. Carrying out Equality Impact Assessments for plans and policies allows the Council to demonstrate that it is meeting these duties.

The proposals have been considered under the Corporate Equalities Impact Assessment process (EqIA) with the following outcome:

- (i) Assessed as **not relevant** for the purposes of EqIA.

Strategic Environmental Assessment

- 3.2 The Environmental Assessment (Scotland) Act 2005 places a duty on the Council to identify and assess the environmental consequences of its proposals.
- 3.2.1 However, no action is required as the Act does not apply to the matters presented in this report. This is because the Committee are requested to note the contents of the report only and the Committee are not being requested to approve, adopt or agree to an action or to set the framework for future decisions.

Sustainability

3.3 N/A

Legal and Governance

3.4 Legal and Governance Services have been consulted on all proposals contained within the main body of the report.

3.5 N/A

Risk

3.6 N/A

4. Consultation

Internal

4.1 The Head of Finance, the Head of Legal and Governance and the Head of Property Services have been consulted in the preparation of this report.

External

4.2 External consultation has not taken place in the preparation of this report.

5. Communication

5.1 N/A

2. BACKGROUND PAPERS

2.1 No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973 (other than any containing confidential or exempt information) were relied on to any material extent in preparing the above report.

3. APPENDICES

3.1 None.