

PERTH AND KINROSS COUNCIL**Strategic Policy & Resources Executive Sub Committee – 11 July 2012****SCOTLAND'S SCHOOLS FOR THE FUTURE – PHASE 3****Report by Executive Director (Education and Children's Services)****ABSTRACT**

This report advises the Sub Committee of the availability of funding from the Scottish Futures Trust (SFT) for Scotland's School for the Future – Phase 3 programme. The report sets out a draft funding bid with priorities identified for consideration. The bid reflects the key priorities for the Council which include significant demographic growth and life expired buildings.

1 RECOMMENDATIONS

It is recommended that the Executive Sub-Committee:

- 1.1 agrees the submission of a bid to the Scottish Government for funding from the Scottish Futures Trust (SFT) for Scotland's Schools for the Future Programme as set out in Appendix B of this report;
- 1.2 notes that the outcome of the bid process will be notified to the Council by September 2012; and
- 1.3 instructs that in the event of a funding offer being made, the Executive Director (Education & Children's Services) will seek approval of the Council prior to acceptance of the offer.

2 BACKGROUND**Scottish Government School Investment Programme**

- 2.1 The £1.25 billion Scotland's Schools for the Future programme was first announced in June 2009 and was originally expected to fund the replacement or refurbishment of 28 secondary and 27 primary/other schools by 2017-18. The Scottish Government is providing £800m funding support, with the balance coming from local authorities.
- 2.2 Thirty seven school building projects from Phase 1 and 2 of the programme have been announced to date. In Perth and Kinross, this includes partial funding for Invergowrie Primary School. The total Government funding for these 37 projects is estimated at just under £400m, slightly less than half the total funding which the Government has committed to the programme. Therefore, Ministers now expect that Phase 3 should involve up to another 30 projects, meaning the programme will be able to deliver around 12 more than the 55 schools initially envisaged.

- 2.3 The Scottish Government wrote to all Directors of Education on 24 February 2012 to request bids for the 3rd phase of funding from Scotland's Schools for the Future programme. The application process and criteria are set out in Appendix A to this report.
- 2.4 Ministers intend that the third phase of funding should be focused on tackling poor condition, unsuitable schools or acute accommodation pressures, and to provide learning environments fit for delivery of Curriculum for Excellence. However, the national funding is intended to augment, not replace, existing short to medium term authority investment plans. It is expected that every authority will continue to invest in its school estate beyond those projects supported through the Scotland's Schools for the Future programme.
- 2.5 Accommodation pressures brought about by housing developments would be expected, wherever possible, to be funded with developers contributions under 'Section 75 agreements'. However, there may be circumstances where such contributions cannot be secured and in such cases the Government will consider applications which seek to deal with accommodation pressures, particularly where the investment will also resolve issues relating to Condition and/or Suitability.
- 2.6 Applications for Phase 3 funding must be submitted by the 21st July 2012. Applications must set out the short to medium term school estate investment requirements in each Council, highlighting the top priority primary, secondary and / or special school projects. Bids are being sought based on the minimum criteria set out below.
- The investment must improve (or deliver) Condition and / or Suitability ratings to Category A, or, where relevant, deal with acute accommodation pressures (which cannot be funded from developers contributions).
 - The Government funding should augment, not replace, local authority funding in their educational capital programmes.
 - Confirmation that the investment will support the delivery of key national and local policies – the school estate strategy, Climate Change Act, value for money.
 - Commitment to work towards the SFT programme metrics, in terms of area per pupil and cost per square metre.
 - Commitment to joint working with other partners to achieve a greater commonality of approach, where practical.

Perth & Kinross School Estate Priorities

- 2.7 On 9 February 2012 the Special Meeting of the Council approved the Composite Capital Budget 2012/13 - 2016/17 (Report No. 12/53 refers). Details relating to the specific projects included within the 5 year capital programme are contained within Report No. 12/114 – Capital Programme 2012/13 – 2016/17.

- 2.8 At this meeting, the Council affirmed its commitment and future vision for longer term investment in the school estate ensuring that all young people will benefit from modern learning environments.
- 2.9 Based on a standard set of criteria, a number of key planning assumptions and information from our planning tools, Education and Children's Services identified key short, medium and long term recommendations for investment in the school estate. These recommendations for prioritisation are regularly reviewed to reflect the changing needs of our communities and focus on the following key criteria:
- CONDITION/SUITABILITY – Current condition and suitability are assessed on a regular basis in conjunction with Corporate Asset Management and Property Services.
 - CAPACITY – Current and future pupil rolls will dictate the extent of facilities required.
 - COMMUNITY/PLACE - Schools sit at the heart of our communities and it is important that whilst they need to meet the needs of the curriculum that they also meet the wider needs of the community.
- 2.10 Priorities for the development of the school estate were identified in the School Estate Review approved by the Lifelong Learning School Estate Sub-Committee on 8 March 2012 (Report No. 12/113 refers).
- 2.11 The approved planned priorities, based on the key criteria above (2.9), for securing the future of the school estate in Perth and Kinross focus on four key areas:
- existing programme;
 - life expired buildings;
 - secondary practical teaching areas; and
 - the impact of the proposed Local Development Plan (LDP) and potential house building.
- The term "life expired" has been used to determine the buildings that have deteriorated to a point where there are major structural and service needs and significant investment is required. This classification includes HORSAs, huts, and Consortium of Local Authorities Special Programme (CLASP) variants.
- 2.12 The housing numbers set out in the proposed LDP, the impact from potential house building where planning consent has already been granted, and undeveloped areas of the current Local Development Plans pose a major challenge to the future of our school estate. This is a particular challenge in the area to the north of Perth City with major developments already the subject of planning applications.
- 2.13 Whilst the current economic climate and its effect on the housing market, will ultimately drive where the priority areas of school estate expansion will be, and the timescales of when they may be required, a number of areas of major pressure were identified within the estate review. And whilst the Council intends to maximise the development of Section 75 agreements with developers, significant additional funding will be required.

2.14 Table 1 below shows the projected increase in pupil numbers within Perth and Kinross, on an area by area basis, should the proposed LDP and other potential house building conclude in their entirety over the lifetime of the plan.

Secondary Schools	Houses	Current secondary capacity	Current secondary roll	Potential additional secondary pupils	Cumulative current primary capacities	Current primary rolls	Potential additional primary pupils
Perth City	15906	4784	3485	2386	7775	5841	4295
Blairgowrie High	2912	1058	857	437	1768	1086	786
Pitlochry High	715	237	156	107	400	254	193
Breadalbane Academy	1180	784	499	177	712	453	319
Crieff High	1312	959	652	197	953	692	354
Community School of Auchterarder	1705	799	491	256	760	504	460
Kinross High	1409	1286	895	211	1176	915	380

Table 1

The table evidences the most significant pressure within Perth City.

2.15 The School Estate Review identified clearly that whilst it is unlikely that all developments will come to fruition, it is prudent to determine the maximum impact position and monitor as developments arise. Due to the downturn in housing demand, linked to lenders' low appetite for risk, the majority of larger sites identified in the proposed Local Development Plan are likely to develop over a longer period instead of the intended 10 year period of the plan (2014-2024). The Review therefore projected priorities based on these figures to an extended period to 2030.

2.16 It is also important to reaffirm that the current economic climate and its effect on the housing market, will ultimately drive where the priority areas of school estate expansion will be, and the timescales of when they may be required. Projected timeframes for new school development are therefore subject to a degree of uncertainty.

3 PROPOSALS

3.1 It is proposed that the Council submits two projects for consideration under Phase 3 of the Programme. The brief for each project has still to be fully developed and any estimated costs provided at this stage only relate to the school element of the project for which shared funding will be considered.

3.2 The two priorities identified are :

- An all through school to the North of Perth City primarily addressing demographic pressures (section 2.13)
- Tulloch Primary School – a CLASP variant school (sections 2.10 and 2.11)

Other CLASP schools exist, but are not included as current priorities.

3.3 The draft funding bid is attached at Appendix B to this report for consideration.

4 CONSULTATION

4.1 The Executive Officer Team (EOT) and the Head of Finance have been consulted in the preparation of this report.

4.2 Ongoing consultation with colleagues from Planning has enabled ECS to summarise the approach to secure the future of the school estate. Property Services, Corporate Asset Management, Regeneration and Development and Housing and Community Care colleagues have also been consulted through the School Estate Management Plan (SEMP) stakeholder group.

5 RESOURCE IMPLICATIONS

Funding Conditions

5.1 Guidance states that the Phase 3 funding is intended to augment, not replace, existing short to medium term authority investment plans. It is expected that every authority will continue to invest in its school estate beyond those projects supported through the Scotland's Schools for the Future programme.

5.2 Similarly, it is also clear that the national funding should not be used to replace funding for additional pupil places which should be provided through developer contributions. The primary school element of the new all through school will therefore require to be funded through developer contributions and planning gain, in terms of land and a fully serviced site, is also envisioned.

5.3 SFT capital funding for this spending review period has already been fully allocated, which means that in terms of timing only revenue financed SFT projects will be able to commence prior to 2015-16, other than where authorities can fund their share up front in which case such projects may be able to commence in 2014-15.

5.4 The funding awarded will be part revenue, part capital. It is likely that revenue will predominantly be used for secondary projects, and capital for primary projects. Where projects are funded by revenue, the contracted life cycle maintenance and facilities management costs will fall entirely to the Council.

- 5.5 Similarly to phases 1 and 2, the Government's funding will be calculated on the basis of a metric which takes account of pupil roll, an area per pupil and an all-in construction cost per square metre. Although authorities will be able to fund the provision of larger areas from their own budget, they will be expected to work towards the metrics, and demonstrate a clear case for exceeding them.
- 5.6 Funding will be limited to one half of the notional cost of construction of a primary or special school, and two thirds of the notional cost of construction of a secondary school. As with phases 1 and 2, Government funding will be for upgrading the existing school on a like for like basis.
- 5.7 If a Council wishes to provide a wider range of facilities from within the new school building, they will be expected to fund these additional elements themselves.

Existing Funding Programme

- 5.8 The funding required for the two schools has been calculated using the area/cost metrics promulgated by the Scottish Futures Trust and is set out in full detail in Appendix 2 of the bid document:

New all through secondary element £22.99 million

Tulloch Primary School £7.649 million

- 5.9 Should the bid be successful, it will be necessary to submit bids for funding beyond the current 5 year capital programme through the existing capital process. This will commit the Council to investment well in advance of the budget process and as such will require the approval of full Council prior to acceptance of any offer.

	Council Funding	SFT	Dev Contrib	TOTAL	Provisional Timescale (TBC)
New all through school:					
• Nursery	£2.52m			£2.52m	21/22 – 22/23
• Primary			£7.65m	£7.65m	
• Secondary	£7.66m	£15.33m		£22.99	21/22 – 22/23
Tulloch primary replacement	£3.825m	£3.824m		£7.649	17/18 – 18/19

The revenue impact of this additional borrowing will be in the order of £600K per annum if the all-through school bid is successful and £240k per annum if the bid for Tulluch is successful.

- 5.10 There will be additional revenue implications for the new all through school and an upgraded Primary School estimated at £5 million per annum. This population growth should be reflected in grant allocation and increased Council Tax revenue. However detailed projections will require to be submitted as part of a future expenditure pressure with a corresponding saving through the revenue process.

6 COUNCIL CORPORATE PLAN OBJECTIVES 2009-2012

- 6.1 The Council's Corporate Plan 2009-2012 lays out five Objectives which provide clear strategic direction, inform decisions at a corporate and service level and shape resources allocation. They are as follows:-

- (i) A Safe, Secure and Welcoming Environment
- (ii) Healthy, Caring Communities
- (iii) A Prosperous, Sustainable and Inclusive Economy
- (iv) Educated, Responsible and Informed Citizens
- (v) Confident, Active and Inclusive Communities

This report relates to all of these objectives.

- 6.2 The report also links to the Education & Children's Services Policy Framework in respect of the following key policy area:

- Maximising Resources

7 EQUALITIES IMPACT ASSESSMENT (EqIA)

- 7.1 An equality impact assessment needs to be carried out for functions, policies, procedures or strategies in relation to race, gender and disability and other relevant protected characteristics. This supports the Council's legal requirement to comply with the duty to assess and consult on relevant new and existing policies.

- 7.2 The function, policy, procedure or strategy presented in this report was considered under the Corporate Equalities Impact Assessment process (Eq1A) with the following outcome:

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

8 STRATEGIC ENVIRONMENTAL ASSESSMENT

- 8.1 Strategic Environmental Assessment (SEA) is a legal requirement under the Environmental Assessment (Scotland) Act 2005 that applies to all qualifying plans, programmes and strategies, including policies (PPS).

8.2 However, no action is required as the Act does not apply to the matters presented in this report. This is because the Committee are not being requested to approve, adopt or agree to an action or to set the framework for future decisions.

8.3 The School Estate Strategy set out within the funding bid will require an SEA.

9 CONCLUSION

9.1 A number of new primary schools and upgrades to other schools are already envisaged within the 5 year capital programme and whilst there is a prioritisation model in place to aid decision making on priority projects, the need for capital works is driven by the ever increasing need for pupil places.

9.2 The Council has already recognised that further investment will be required for future pressures and priorities, including accessing funding through the Scottish Futures Trust (SFT).

9.3 This report sets out priorities for medium term investment in the school estate suitable for submission to the Scottish Government to access additional funding.

JOHN FYFFE
Executive Director (Education and Children's Services)

Note: 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.

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Council Text Phone Number 01738 442573

Application and Selection Process

1. Applications will be reviewed by the Scottish Government to confirm they meet the minimum criteria set out below. The projects will then be matched to the available national funding profile, taking into account issues such as readiness to proceed, bundling opportunities (with phase 1 or 2 projects), etc.
 - The investment must improve (or deliver) Condition and / or Suitability ratings to Category A, or, where relevant, deal with acute accommodation pressures (which can't be funded from developers contributions).
 - The Government funding should augment, not replace, local authority funding in their educational capital programmes.
 - Confirmation that the investment will support the delivery of key national and local policies – the school estate strategy, Climate Change Act, value for money.
 - Commitment to working towards the programme metrics, in terms of area per pupil and cost per square meter.
 - Commitment to joint working with other partners to achieve a greater commonality of approach, where practical.
2. Applications for funding should set out the short to medium term school estate investment requirements in each Council, highlighting the top priority primary, secondary and / or special school projects. The application should include information which explains the prioritisation process and also how the investment will help meet the national objectives set out in paragraphs 10-18 above. It may be appropriate to include your latest School Estate Management Plans and refer to relevant sections, to avoid duplication.
3. As a minimum, the application should contain the following information:
 - i. Short and medium unfunded school estate investment requirements, with priority project highlighted
 - This should explain how the priority projects have been identified and ranked.
 - The information should include Condition and Suitability ratings (based on approaches set out in the Scottish Government guidance documents), and any issues relating to accommodation pressures (although we would expect pressures caused by housing developments to be funded by developers contributions).
 - Include options appraisals, project scopes and outlines, if available.
 - Please also note any practical issues relating to the projects – such as site issues which may take some time to resolve, statutory processes, affordability constraints etc.
 - ii. Current funded LA school building programme
 - Details of current confirmed capital programme, noting projects and estimated spend, which demonstrates that proposed investment would be additional to already approved capital programme.
 - iii. Explanation of how the investment will support the delivery of key national and local policies.
 - The application should articulate how the funding application will contribute towards the implementation of the school estate strategy and Climate Change Act.
 - iv. Commitment to working with SFT and other partners to secure value for money
 - Confirmation that the authority will work towards achieving the programme metrics, and will explore opportunities for partnership working to achieve a greater commonality of approach.
4. Applications should be submitted to the Scottish Government by mid July 2012. We anticipate that we will be in a position to inform authorities by September 2012.



PERTH AND KINROSS COUNCIL

EDUCATION AND CHILDREN'S SERVICES

SCOTLAND'S SCHOOLS FOR THE FUTURE

PHASE 3 BID

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EXECUTIVE SUMMARY

In Perth and Kinross a major review of the school estate has taken place to determine the likely impact which population growth, current condition and suitability have on primary and secondary education within the area. When considered alongside the wider asset management and capital issues, priorities for the development of the school estate have been clearly identified.

Top priorities for the Council are for an all through school on the northern perimeter of Perth and for a replacement of an existing CLASP ⁽¹⁾ variant primary school in Perth.

The planning, design and delivery of the schools will be in line with the Council's objectives for educational facilities and which are commensurate with the nine national guiding principles for the school estate.

A significant investment is required to deliver an all through school and a replacement primary school in Perth. This bid contains proposals for funding of £23 million for the secondary element of the all through school. The primary school element of the all through school is planned to be funded from developer contributions. In addition £7.6 million is being sought for the replacement of the existing Tulloch Primary School.

Perth and Kinross proposes to design and develop new schools which enable the layout of the accommodation and resources to fully support the delivery of Curriculum for Excellence and take full advantage of the opportunities modern technology offers.

Perth and Kinross is keen to explore a number of routes to deliver these objectives, including collaboration with neighbouring authorities and examining alternative methods of procurement. It is proposed to bundle the all through primary and secondary schools together and construct as one contract. Key to our approach is sustained provision and partnership working, responding to changes in demand and need.

The Council remains committed to investment in its school estate aiming to ensure all its young people have access to modern learning environments.

Convener
Lifelong Learning Committee

Executive Director
Education and Children's services

⁽¹⁾ *Consortium of Local Authorities Special Programme (CLASP) is a prefabricated school building programme that was favoured at the time for speed of erection and modern architectural design.*

1. INTRODUCTION

a. Vision and Objectives

The vision for Perth and Kinross, shared across our [Community Planning Partnership](#), is for a confident and ambitious Perth and Kinross, to which everyone can contribute and in which all can share. The vision and its delivery are designed to lead to the local outcomes reflecting what people in Perth and Kinross have expressed as important:

- A thriving, expanding economy
- Well paid employment opportunities for all
- Stronger communities
- Young people reach their potential
- Children have the best start in life

These objectives and outcomes are the local expression of the Scottish Government's Purpose and agreed national outcomes.

As a significant asset, the school estate can make a large contribution in delivering these outcomes. In Perth and Kinross, the [Investment in Learning Programme](#) saw the development of six community campuses that not only meet educational needs but also encompass social, recreational, cultural and sporting needs and aspirations of the wider community. Continuing to invest in the school estate, at both a local and national level, is a tangible expression of the Council's commitment to delivering these important outcomes.

The national strategy for the school estate as outlined in "[Building Better Schools: Investing in Scotland's Future](#)" incorporates a similar vision and aspirations and these principles inform the Council's decisions when considering future plans and action for the school estate. Perth and Kinross's vision sets out the aspirations for a school estate that clearly aligns with [stakeholders shared vision for the school estate](#):

"... which signal the high value we place on learning; which people and communities can enjoy using and can be proud; which are well designed, maintained and managed and which encourage continuous engagement with learning; which are far more than just 'educational establishments' whose quality of environment supports an accessible range of services and opportunities and which enrich the communities they serve and the lives of learners and families."

The Investment in Learning programme embodied these aspirations and the community campuses deliver a wide range of services to the local community.

Education and Children's Service's [Statement of Intent](#) priorities are:

1. Supporting vulnerable children and families
2. Raising achievement for all
3. Improving the quality of life for individuals and communities
4. Enabling the delivery of high quality public services

One of the key drivers for Education and Children's Services is a coherent shift to a greater focus on prevention and early intervention to tackle the root causes of inequality and negative outcomes. The Getting It Right For Every Child (GIRFEC) principles aim to ensure that children and young people are provided with the best possible start in life. Together with partners, intervention takes place at the earliest possible point and intensive targeted support to address issues or concerns is provided where required. The ability of schools in local areas to afford a range of integrated facilities for Council and partner organisations is central to support the delivery of these priorities.

The objectives that the schools estate programme aims to deliver are:

- Fit for purpose educational accommodation that is in line with Curriculum for Excellence teaching practice;
- Meet the needs of the current and future known pupil roll projections;
- A safe, secure and welcoming environment to suit the needs of all users of the establishments;
- Delivery of adequate and efficient education and cultural services;
- Provide accommodation that can support communities;
- Ability to work in partnership with other agencies and the third sector at a local level;
- Use assets as efficiently as possible by co-location of staff and services; and
- Ensure sustainable development.

The recent primary schools completed at Dunning and Errol are consistent with these objectives and principles and exemplify our strategy to provide facilities accessible to the local community and other agencies.

b. Perth and Kinross Council School Estate Strategy

The school estate is a significant asset which is fundamental to the delivery of national and local outcomes leading to improved lives for the people of Perth and Kinross. In order that these outcomes are delivered, ECS has developed a School Estate Strategy which details our approach to managing and developing the school estate. It documents our vision and aspirations, the overall strategic context, drivers for change, governance, achievements, performance and way forward.

A copy of the strategy is attached as Appendix 1.

c. Perth and Kinross Capital Plan

The plan is funded from a number of sources: Perth and Kinross Council capital funds; developer contributions and Scottish Futures Trust grant.

Given the identified pressures on the school estate Perth and Kinross Council further demonstrated its commitment to investing in the school estate with an additional £20 million added to its [capital plan](#) at its meeting in February 2012. The plan running across 2012/17 will deliver the replacement and/or extension of 5 primary schools (Abernethy, Alyth, Crieff, Invergowrie and Oakbank (one of our 4 CLASP variant schools)) and major refurbishment works at Perth Academy and Perth Grammar School where an emphasis has been placed on practical classrooms.

The funding in the current plan for identified projects in the school estate amounts to £62 million between 2012/13 and 2016/17.

2. SCHOOL ESTATE

a. Current School Estate

The local authority has:

- 10 secondary schools with a current roll of 7,567 and a capacity of 9,907.
- 75 primary schools with a current roll of 9,745 and a capacity of 13,517.

Roll figures relate to the 2011 Census and capacities are as agreed by the School Estate Sub Committee.

Within the proposed Local Plan there are significant pressures on schools in Perth City. At primary level in Perth City the collective occupancy level is currently sitting at 80% and with the forecast population growth some schools may be at full capacity in the short to medium term. A school estate model is used to forecast where pressures may arise and further details are given in the section on school estate future needs below.

b. School Estate Future needs

The approach to examining future needs for educational facilities in Perth and Kinross is robust and subject to rigorous evaluation on an annual basis. Perth and Kinross Council area has experienced significant population growth in recent years and recognises that this trend is likely to continue. Over the past 11 years Perth and Kinross population growth was the highest in Scotland at +10.3%¹. The Council have therefore taken the opportunity to map the likely growth in each community and forecast in detail the educational demand. Our approach encompasses:

- (i) Monitoring of demographic changes;
- (ii) Projected pupil numbers over the next 7 years based on historic trends;
- (iii) Daily monitoring of planning applications;
- (iv) Meetings with planners and developers on proposed large scale developments;
- (v) Meetings with Homes for Scotland;
- (vi) Annual prioritisation exercise; and
- (vii) Annual school estate review.

¹ Source: *National Records of Scotland: High Level Summary of Statistics: Population and Migration*

As the [proposed Local Development Plan](#) is now issued for consultation, a major exercise was undertaken with planners to understand the impact of proposed developments on the ability of Education and Children's Services to accommodate projected pupils numbers in schools. The Council now has an in-depth understanding of the possible growth impact on the school estate projected to 2030.

The [committee report](#) and presentation given at the School Estate Sub Committee in March 2012 informed the Council about this review and the approach taken to secure the future of the school estate for our communities.

In summary the proposed Local Development Plan envisages that an additional 7,250 houses may be required for developments within the Plan period 2010 – 2024. This alone may generate an additional 1,957 primary pupils and 1,087 secondary pupils across Perth and Kinross.

The potential effect of the proposed Local Development Plan and planning applications already in the system indicates a large pressure on secondary and primary accommodation in Perth City. At secondary level there is current capacity of 3946 and a potential roll of 4441 in the medium term rising to 5453 in the longer term. At primary level there is a current capacity of 3883 and a potential roll of 4781 rising to 6603 in the longer term.

Existing secondary schools in Perth City were the subject of a detailed option appraisal investigation and given the pupil numbers and capacity pressures the favoured option was a new build to the north of Perth. This would be designed to take the pressure off the existing secondaries in Perth City with some feeder primaries no longer having to come into Perth City.

For primary schools, a prioritisation process is applied and then schools are reviewed in respect of recent capital activity. The prioritisation model incorporates weighted criterion of condition, suitability, running costs, current projected and future potential occupancy. Priority primary schools then emerge from this process. Thereafter business cases are prepared to bid for funding for the prioritised projects to address the identified needs. The replacement primary school for Tulloch has been prioritised primarily due to condition pressures.

The proposal for an all through school to the north of Perth would allow efficiencies to be generated from the bundled scale of the development. Experience gained from running the existing all through schools in Perth and Kinross at Breadalbane Academy, Community School of Auchterarder and St John's Academy show significant educational, financial and social benefits from having secondary and primary schools on the same site.

3. PRIORITISED PROJECTS

In order to assist in addressing these pressures the Council considers that a new all through school based to the north of Perth and a replacement for Tulloch Primary School is required.

It is anticipated that any associated developments not eligible for funding under the bid criteria will be funded through the Council's capital planning process and developers contributions.

4. FUNDING REQUIREMENT

The proposed all through school would provide accommodation for 1100 secondary pupils, a two stream primary school and a nursery of 8 full time and 40/40 sessional places.

The funding required for the schools has been calculated using the area/cost metrics promulgated by the Scottish Futures Trust and is given below with full details in Appendix 2:

New all through secondary element	£22.990 million
Tulloch Primary School	£7.649 million

It has been assumed that the land required for the all through school will be provided by a developer as planning gain.

The primary school element of the all through school estimated around £7.65 million will be funded through developer contributions.

It is recognised that a successful bid would commit the Council to investment in advance of the budget process. Provisional timescales for funding requirements have been forecast commencing for the new all through school in 2021/22 and for the replacement Tulloch Primary School in 2017/18.

5. DELIVERABILITY

a. Statutory Consultation

Proposals will require to be developed to establish a catchment for the new all through school. This will require a full, fair and rigorous statutory consultation exercise to be conducted with the relevant consultees to explain the reasons and set out the potential implications and consequences on groups of pupils and parents and other schools. This is likely to impact on the existing primary and secondary catchments in Perth City and for feeder primary schools to Blairgowrie High School.

b. Key Dependencies

There will be a need to secure land for the new all through school in Perth. There are major developments proposed on the outskirts of Perth and it is intended through negotiation to secure serviced and accessible land and developer contributions towards the new all through school.

There is a proposal at a future date to have a third bridge over the River Tay. When this bridge is in place it will allow a wider consideration of the catchment for the new all through school. By diverting school traffic away from Perth to the new all through school it will also have a wider area impact in terms of traffic management, environmental and sustainability issues in Perth City.

c. Management Resourcing

The Council has experienced and skilled programme and project managers within Education and Children's Services to manage such a large project. As client, our approach follows Cabinet Office recommended best practice for management programmes and projects with a robust governance framework in place, and staff that have national recognised programme and project management qualifications. Our quality management system encompasses a rigorous quality assurance system, including peer review. There is a clear focus on putting value in the right place to deliver facilities that will serve our communities now and in the future.

It is likely that a multi-disciplinary team will be established to drive this project forward, ensuring decisions are made and necessary information supplied timeously.

d. Delivery History

(i) Partnership Working

Partnership work is a key focus area within Education and Children's Services. The recent Care Inspectorate inspection of services to protect children and young people in Perth and Kinross confirmed "a strong culture

and ethos of improving outcomes through integrated services and partnership working at all levels” as a key strength.

Partnership working continues to develop within projects through the following means:

- Procurement programme for capital projects
- User reference groups for developing capital projects
- Cross service working to ensure a holistic approach is taken in developing projects i.e. planned maintenance projects
- External agencies to inform good practice as part of design development and benchmarking for costs.

Recent larger school projects delivered include:

- major refurbishment and new core facilities at Blairgowrie High School;
- creation of an all weather pitch at Perth High School;
- accessibility works across all secondary schools;
- new primary schools at Dunning and Errol;
- Fairview, an integrated nursery, primary and secondary school for pupils with additional support needs.

Attached as Appendix 3 are case studies that evidence the approach, objectives, consultation and outcomes for two projects (Almondbank and Aytoun Hall) delivered by Education and Children’s Services.

(ii) Information Technology

The development of new schools presents the opportunity to implement ICT and technology solutions which can significantly improve the flexibility of the buildings as well as improving the quality of learning and teaching opportunities across the curriculum.

In our recent Investment in Learning campuses we have adopted a strategy which includes pervasive IT infrastructure, ensuring that every space can become an interactive learning situation. Strategies will be in place to facilitate mobile devices, personal equipment and other interactive technology, thus ensuring that ICT usage will not be restricted to ‘IT labs’.

The technology deployed will be future-proofed for flexibility and adaptability and will be able to ‘flex’ in response to future changes in the scale and nature of demand and usage.

An essential part of developing the Four Capacities of *Curriculum for Excellence* in our children and young people is to give them ICT skills for learning, for life and for work. It is therefore crucial to Education & Children’s Services that all learners should equip themselves with ICT skills, knowledge, understanding and awareness to make the best use of their access to such technology.

The Council is committed to maintaining its ICT investment, just as it is to its physical assets, to ensure that pupils, service users and communities get the absolute best from the facilities we provide.

e. Procurement

Given the scale of this large project it is likely that the delivery vehicle for this project will be the East/Central hub. Exploratory discussions have commenced with SFT and East/Central hub to consider appropriate governance and working arrangements.

f. Communications and consultation

As part of our school estate programme, clear and timely communications from the outset are managed through project specific communications and consultation plans. It is recognised that the submission of this application will raise expectations from the community and these require to be managed in a coordinated manner. This will be developed with communications specialists within the Council.

The communications plan is kept under regular review throughout project development and construction phases to ensure the right message is delivered to the right people at the right time. Key stakeholders are identified within existing groups and invited to become involved with the development of the project.

Development of the design for the school encompasses a close working relationship with the Headteacher and Parent Council. The pupils, parents and wider school community will be involved in a local User Reference Group to finalise the outline design and facilities. Thereafter the wider Parent Forum has opportunities to view and express opinions on the proposals. Once the project is onsite, and in conjunction with the contractor, pupils are engaged to monitor and report progress to their fellow pupils, colleagues and local community.

As previously noted, a statutory consultation exercise will require to take place to consider the educational benefits of the proposed new all through school.

g. Risk Plan

While the overall risks associated with this bid are controlled and managed through the Council, ECS and team risk plans, a specific risk plan for this proposal will be drawn up to enable officers to control and manage the project risks. A high level project risk plan is attached as Appendix 4.

h. Benefits

There are numerous benefits that flow from this bid proposal:

- more schools in full compliance with legislative and building standards and improve the condition and suitability to A ratings;
- further progress towards the Single Outcome Agreement targets agreed with the Scottish Government;
- evidence of progress of our local and national strategic themes;
- addressing Christie Commission recommendations;
- appropriate facilities to enhance the learning environment and early intervention work;
- accommodation that is safe and protected;
- views of our customers and staff to improve services;
- reduced ongoing maintenance costs;
- a sustainable and inclusive environment;
- maximum use of available resources;
- minimised waste and promotes sustainable practices through sustainable methods in line with Scottish Government identified four priority areas:
 - Sustainable Consumption and Production;
 - Climate Change and Energy;
 - Natural Resource Protection and Environmental Enhancement;
 - and
 - Sustainable Communities.

The Council will work in partnership with colleagues to ensure a co-ordinated approach to programming works and achieving economies of scale.

6. CONCLUSION

This bid affords Perth and Kinross Council the opportunity to access funding for large scale projects that would otherwise skew the Council's capital plan.

It supports the Council's continued programme of investment in the school estate. The population growth, both experienced and projected, continues to put pressure on schools and there is a clear school estate management approach in place that directs investment to meet need. A robust governance framework and qualified staff with a track record of delivery ensures that maximum value will be derived from the investment.

APPENDICES

Appendix 1	Perth and Kinross School Estate Strategy
Appendix 2	Project profiles
Appendix 3	Case Studies
Appendix 4	High Level Risk Plan

PERTH AND KINROSS COUNCIL
EDUCATION & CHILDREN'S SERVICES
SCHOOL ESTATE STRATEGY 2012 - 2017

Why do we need a school estate strategy?

Schools are integral parts of the communities they serve. They impact on the lives of not only pupils and their families but on the wider community including adult learners, library users, sports enthusiasts, businesses and members of clubs and associations. They provide local employment and access to facilities, which would otherwise not be available in the local community and often provide a focus for community life.

It is important that such a significant and valuable asset is managed in an efficient and effective manner while meeting the wider strategic objectives of the Council and benefiting our communities.

Our strategy considers the development and management of the school estate in the context of meeting national and local outcomes, planning ahead and providing best value and benefits to our communities.

What is the school estate?

Education and Children's Services (ECS) provide a wide range of services to all communities in Perth & Kinross including Education (Early Years, Nursery, Primary, Secondary and Special Needs), Youth, Community, Sports Development, Culture, and Children's Services.

In order to provide these services, ECS manages a large number of property assets including schools, community campuses, community learning centres, libraries, museums, art galleries, outdoor centres, resource centres and child and family centres.

The school estate forms the largest part of our property assets and consists of 75 primary schools, 10 secondary schools, 1 nursery and 1 Additional Support Needs (ASN) school.

The assets managed and run by the Service, including the school estate, need to be fit for purpose to provide modern public services that meet the current and future needs of our communities. The School Estate Strategy details our approach to meeting this objective.

What are our aspirations for the school estate?

The shared vision of local government and the Scottish Government for the future of the school estate is articulated as follows:

“Our vision is for schools which signal the high value we place on learning; which people and communities can enjoy using and can be proud; which are well designed, maintained and managed and which encourage continuous engagement with learning; which are far more than just ‘educational establishments’ whose quality of environment supports an accessible range of services and opportunities and which enrich the communities they serve and the lives of learners and families”¹

The Council shares this vision for the future of the school estate and along with other Local Authorities, has articulated aspirations and principles related to the planning and management of the school estate. The aspirations of the national strategy and of our school estate strategy are as follows:

- All children and young people will be educated in, and community users will use, schools that are 'fit for purpose' in terms of condition, suitability and sufficiency;
- Schools are well-designed, accessible, inclusive learning environments that inspire and drive new thinking and change and which support the delivery of high quality educational experiences through *Curriculum for Excellence*;
- Schools are integral parts of the communities they serve, with pupils making use of community facilities and communities accessing school facilities;
- Schools accommodate and provide a range of services, activities and facilities that make a difference to people's health and well being, to sustaining economic growth and to the strength and vibrancy of communities;
- A sustainable school estate whose design, construction and operation is environmentally and energy efficient; contributes directly to delivering the year-on-year reductions in greenhouse gas emissions introduced by the Climate Change (Scotland) Act 2009, which is resilient to the impact of climate change and which leads by example in matters of environmental performance;
- A school estate that is efficiently run and that maximises value for money;
- A school estate which is flexible and responsive - both to changes in demand for school places and to learners' and teachers' requirements and wishes and where the beneficial impact of change, is maximised by thorough consultation and engagement with users and stakeholders.

¹ “Building Better Schools: Investing in Scotland's future”. The Scottish Government, September 2009

How does the school estate fit the wider strategic context?

The school estate is a significant asset which is fundamental to the delivery of national and local outcomes leading to improved lives for the people of Perth and Kinross.

The Scottish Government and COSLA have shown their commitment to invest in the school estate through their strategy “Building Better Schools: Investing in Scotland’s future”. The strategy recognises the importance of the school estate in supporting outcomes that are necessary for a more successful Scotland.

These national outcomes are reflected in the Perth and Kinross Community Planning Partnership Single Outcome Agreement (SOA). Our vision is of a confident and ambitious Perth and Kinross with a strong identity and clear outcomes that everyone works together to achieve. Our area will be vibrant and successful; a safe, secure and healthy environment; and a place where people and communities are nurtured and supported. To deliver these outcomes we are focusing on strategic themes which link to the Scottish Government’s key commitments²:

- Getting it Right for Every Child (GIRFEC)
- Health and Social Care Integration
- Public Protection
- Regeneration (Social, Environment, Economic)

This strategy also directly links to the Corporate Asset Management Plan which underpins the strategic objectives of the Council in maintaining and creating assets to deliver priority services.

Aligned with the national and local priorities, are specific Education and Children’s Services priorities which the school estate and the strategy must support. These are to:

- Raise achievement for all;
- Support and protect vulnerable children and families;
- Improve the quality of life for individuals and communities; and
- Enable the delivery of high quality public services.

² Renewing Scotland: The Government’s Programme for Scotland 2011-2012

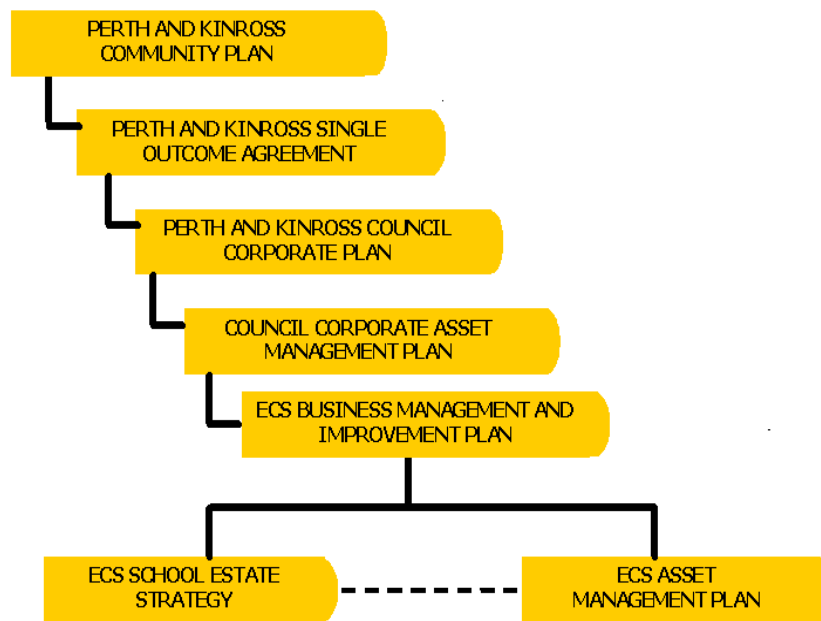


Diagram 1: Strategic Context

How will the strategy be delivered?

The school estate strategy will be delivered through the Service Asset Management Plan (SAMP), the School Estate Management Plan (SEMP) supported by the ECS capital programme.

Through effective asset management the future priorities for development within the school estate are highlighted. This process includes consideration of the schools' core facts data³, capacities and known and planned developments within each school catchment area.

The ECS capital programme details the priorities for the school estate over a rolling five year period. This programme is reviewed on an annual basis. These priorities are based on the SEMP. The current priorities are; current programme; life expired buildings, secondary practical teaching areas; and the impact of the new Local Development Plan and potential house building.

An overall programme plan details timescales for each of the individual projects etc.

³ Core Facts data - Information collected by the Scottish Government on the extent, condition and sufficiency of the school estate. Information is used at both national and local level to inform targets, spending decisions, support monitoring and evaluation of progress over time and support assessments of value for money.

Who is responsible for the delivery of the strategy, programme and plans?

Education and Children's Services' property portfolio is managed through the School Estate Sub-Committee of the Life Long Learning Committee, which meets quarterly. The Sub-Committee approves the Service Asset Management Plan (SAMP), the School Estate Management Plan (SEMP) and the capital programme.

The Strategic Policy and Resources Committee (SP&R) approves the ECS capital plan.

The capital programme for schools is managed through a programme board chaired by the Head of Business Change and IT. This is supported by the SEMP group, which represents the interests of key business areas including schools, asset management, education operations, finance and asset management.

Project teams exist for each project within the capital programme. These project teams are accountable to the Primary and Secondary Core Groups.

The governance of the School Estate Strategy and Programme is detailed in Appendix A.

What progress have we made?

The Council's School Estate Management Plan 2011 evidences the progress made in improving the buildings and facilities within the school property portfolio. The key performance indicators for the school estate include condition, suitability and utilisation. Our asset management planning is constantly updated through reviewing the performance of our estate.

The current performance of our estate is summarised in the Service Asset Management Plan (SAMP) for 2011, an overview is attached as Appendix B.

Case Studies highlighting projects completed as part of our school estate management plan are detailed throughout the remainder of this document.

What is influencing our future direction?

The school estate has been developed over many decades and will continue to support our local and national priorities for decades to come. The longevity of the estate requires it to adapt to changes in learning, legislation, technology and society. Some of the drivers for change in the life of this strategy include:

Political

The Cabinet Secretary for Education and Lifelong Learning has announced the setting up of a **Commission for the Delivery of Rural Education** and had requested a moratorium on rural school closures until June 2012. The Commission will examine the delivery of rural education and how outcomes for both pupils and communities can be maximised. The Commission had intended to report in August 2012 however due to the need for the Commission to await the outcome of an appeal the Commission may not finalise its report before the end of 2012 at the earliest. It is unlikely that there will be any statutory consultations on rural school closures until the Commission's report has been published. The Council will have to consider the recommendations of the report in relation to managing the school estate and in particular its utilisation.

The **Commission on the Future Delivery of Public Services** (the Christie Commission) was established by the Scottish Government in November 2010 to develop recommendations for the future delivery of public services.

In response to the Christie Commission's recommendations, the Scottish Government stated it will transform public services through four pillars of reform: a decisive shift towards prevention; greater integration at a local level driven by better partnership; workforce development; and a sharper, more transparent focus on performance.

The Climate Change (Scotland) Act 2009 introduces ambitious legislation to reduce emissions by at least 80 per cent by 2050, and will drive new thinking, new solutions and new technologies putting Scotland at the forefront of building a sustainable low carbon economy.

All public buildings are intended to be exemplars of best practice of a low carbon estate.

Investment in Learning Programme

In October 2007, the Investment in Learning programme was agreed and encompassed the replacement of 9 existing schools with 6 modern learning campuses. The programme is now complete and new campuses are located throughout Perth and Kinross at Aberfeldy, Blairgowrie, Crieff, Kinross and at two sites in Perth. This multi million pound programme accommodates over one quarter of the pupil population in modern accommodation and provides an extensive range of community facilities.

Loch Leven Community Campus

One of the first Investment in Learning (IIL) campuses to open was Loch Leven Community Campus which provides a replacement Kinross secondary school with additional community facilities and services on a new site close to the existing recreation centre.

The campus offers access to a diverse range of facilities for individuals, community groups and sports clubs. Among facilities provided are: a library, museum and café zone; meeting rooms and conference suites, interview rooms, lecture theatre, contemplation room, hall with cinema-style projection and specialist areas including kitchen/lifeskills room. All Council Services, previously provided from other buildings in Kinross are now sited together within an Integrated Team Base within the campus, facilitating flexible working for employees and a 'one stop shop' for customers.

Economic

The risks of a **reduced level of external funding** for the capital budget in later years is moderate to high, and it is anticipated that future capital resources will reduce accordingly.

The construction industry has been affected by the economic recession, with one of the highest levels of insolvencies of all industries. The 'health' of the construction industry is fundamental to the ability of the Council to deliver its school estate strategy.

Social

Perth and Kinross has one of the largest **projected gains in population** compared to other Scottish authorities. In the period 2006-2031, GROS population projections for Perth and Kinross show an increase of 22% with the 0 to 15 age group projected to increase by 14%. The new Investment in Learning (IIL) school building programme has provided additional capacity however this is unlikely to accommodate the projected population increase.

The new Local Development Plan highlights a **potential growth in house building** in areas of Perth and Kinross, which may cause substantial pressure on the capacity of schools within the area.

Curriculum for Excellence aims to achieve a transformation in education in Scotland by providing a coherent, more flexible and enriched curriculum from 3 to 18. The curriculum includes the totality of experiences which are planned for children and young people through their education, wherever they are being educated.

Curriculum for excellence has changed the concept of a school, its purposes, functions, design and the way the spaces are used. There is an expectation that the buildings themselves will inspire pupils and teachers to learn and teach in new ways.

Technical

ICT plays a significant part in the government's strategies for Lifelong Learning and it is incumbent upon Local Authorities to support pupils and teachers in the use of ICT within the learning and teaching process.

The constant and rapid change in technology leads to a requirement for continued investment in ICT infrastructure. This investment is crucial to provide an active and stimulating learning environment, provide opportunities to bring innovation and creativity to classrooms and ensure attainment and achievement is supported by 21st century ICT resources.

Innovative construction methods and products, and the innovative use of traditional, natural and recycled materials, increasingly offer new ways of constructing sustainable and affordable buildings, which inspire users and support the delivery of high quality educational experiences.

What are we going to do?

The aim of this strategy is to deliver on the vision and the aspirations of the "Building Better Schools: Investing in Scotland's future" report. Appendix C details each of the aspirations and the vehicles for their delivery. The following principles will guide us:

We will continue to prioritise the investment in our school estate. Through asset management planning, prioritisation criteria have been developed for investment in the school estate ensuring resources are targeted to the highest priority areas. The SEMP details our short, medium and long-term priorities. Appendix D details approved priorities.

We will promote sustainability in the school estate. This includes energy efficient measures, renewable technologies and in the design of new, extension or repair works.

We will utilise our buildings effectively and efficiently. A future programme of area based reviews is planned, with the aim of improving the effective use of the property portfolio in a geographic area and opening new lines of communication with public sector partners.

We will actively pursue, the development of further community based facilities within school buildings as we review our property portfolio and prepare plans for future development.

We will continue to engage with users and communities in developing the school estate on a local basis

We will continue to refine and develop performance measures for the school estate including school design guidelines and post occupancy reviews

Fairview School

The new Fairview School amalgamated the school facilities at Cherrybank, and Glebe, to provide a single new establishment offering a high quality service supporting children and young people who have the most severe, complex, multiple and enduring needs in Perth and Kinross. Fairview School opened in March 2008 and was recognised as an exemplar in the field of ASN (Additional Support Needs) provision

The 2,800m² exemplar building has been constructed on the existing Perth Academy/Viewlands campus and opened in March 2008 providing accommodation for 65 pupils with a nursery, four primary classrooms, 7 secondary classrooms, staff offices/administration rooms, art/music/ therapy rooms, warm water pool with changing facilities, assembly hall, dining area/ kitchen and a conservatory.

How will we resource it?

The Council continues to face unprecedented financial constraints over the coming years. The Council's Strategy to Secure the Future sets out a path to 2015 and beyond which will allow the organisation to achieve the required modernisation and efficiencies to meet the financial challenge and future service demand.

The Council has a **5 year capital investment programme**. This supports the longer term planning of capital investment in the school estate and allows appropriate lead in times for school upgrade projects, thus ensuring that the scarce resources which are available for this purpose are targeted effectively and efficiently. The SEMP is key to securing capital investment for the programme.

In order to mitigate the impact of new development and to meet the needs of the local community a Primary Education and New Housing Contributions Policy was adopted in May 2009 in conjunction with a **Developer Contributions** Policy. A standard contribution has been applied to new housing in school catchment areas with capacity concerns.

The ECS resources team works closely with The Environment Service (TES) Technical Services to deliver the School Estate programme and other ECS building projects. Currently design and management of building projects is delivered internally while the construction element is procured externally.

A procurement strategy is being adopted which will consider a mixed economy of delivery for the programme. This includes internal resources for project management and design, the private sector through existing contracts for construction, and other resources specifically the East Central Hub for design and build.

The East Central Hub is an initiative led by the Scottish Futures Trust (SFT⁴), in which participating public bodies team up with a private partner to form a new joint venture company known as a hubCo that will deliver a pipeline of projects on behalf of the public bodies. The private partner for the East Central Hub is the Amber Blue Consortium.

How will we know we have succeeded?

Performance is reported through the ECS annual Business Management and Improvement plan (BMIP). In addition, the Council reports on an annual basis to the Scottish Government on a range of information and measures related to the school estate called the 'core facts data'. The core facts data along with other indicators as detailed in Appendix C will measure the progress towards our aspirations and outcomes.

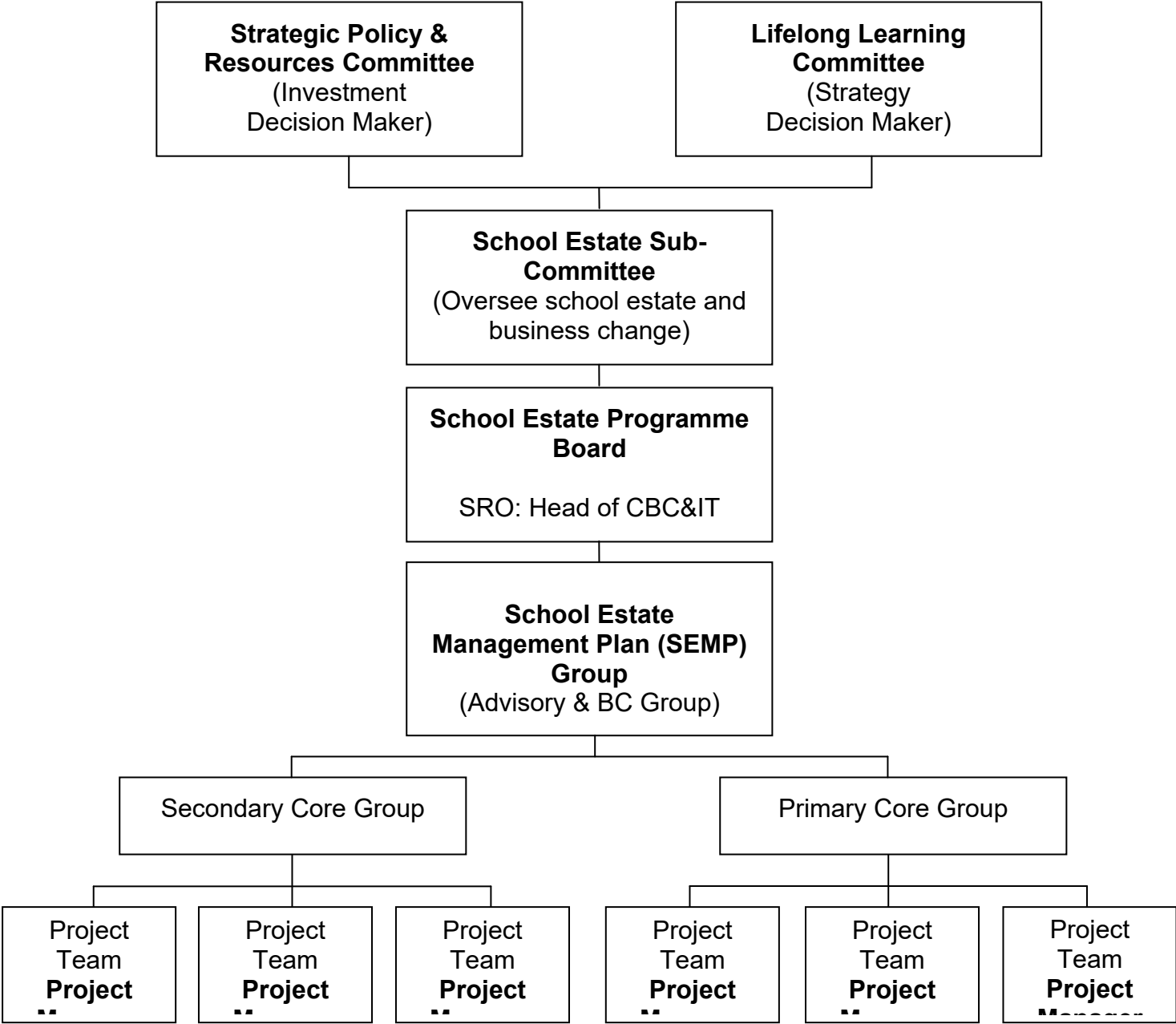
Summary

The purpose of this strategy is to recognise the importance of the school estate in delivering some of the primary objectives of the Council and the Scottish Government and to ensure that we have a clear understanding of where we want to be and how we get there.

This strategy details our vision and aspirations, the overall strategic context of the strategy, the drivers for change, our governance, our achievements and our way forward.

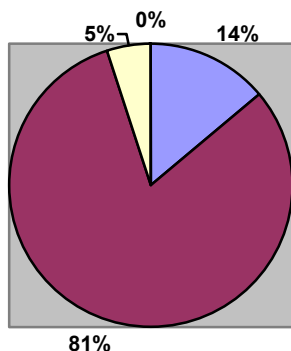
The strategy will be reviewed on an annual basis alongside the Service Asset Management Plan.

⁴ The SFT is a Government-owned company, set up in September 2008, to improve public infrastructure investment, working collaboratively with public bodies and industry to obtain better value for money.



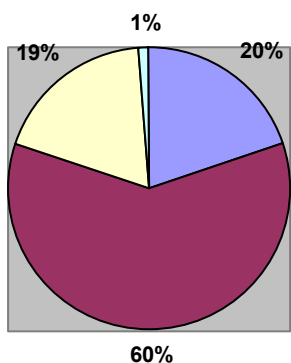
APPENDIX B

Condition Pie Chart (as at April 2011)



- A - good - performing well and operating efficiently (12 schools)
- B - satisfactory - performing adequately but showing minor deterioration (68 schools)
- C - poor - showing major defects and/or not operating adequately (4 schools)
- D - bad - economic life expired and/or risk of failure (0 schools)

Suitability Pie Chart (as at April 2011)



- A - good - performing well and operating efficiently (20%)
- B - satisfactory - performing well but with minor problems (60%)
- C - poor - showing major problems and/or not operating optimally (19%)
- D - unsuitable - does not support the delivery of services to children and communities (1%)

Aspiration	Delivered Through	Measures
All children and young people will be educated in, and community users will use, schools that are 'fit for purpose' in terms of condition, suitability and sufficiency;	School Estate Management Plan (SEMP) Capital Programme	Core Data Facts Condition Suitability Sufficiency
Schools are well-designed, accessible, inclusive learning environments that inspire and drive new thinking and change and which support the delivery of high quality educational experiences through <i>Curriculum for Excellence</i> ;	School design guidelines User Reference Groups Post Project Occupancy Reviews	User Satisfaction School design guidelines Project Key Performance Indicators
Schools are integral parts of the communities they serve, with pupils making use of community facilities and communities accessing school facilities;	Corporate Asset Management Plan Service Needs and Property Issues (SNAPI)	Provision of other Services from Schools Provision of pre-5 facilities within schools
Schools accommodate and provide a range of services, activities and facilities that make a difference to people's health and well being, to sustaining economic growth and to the strength and vibrancy of communities;	Corporate Asset Management Plan Service Needs and Property Issues (SNAPI)	Provision of other Services from Schools
A sustainable school estate whose design, construction and operation is environmentally and energy efficient; contributes directly to delivering the year-on-year reductions in greenhouse	Corporate Energy Management and Conservation Policy (SP&R) 14/9/11)	Energy Efficiency Running Costs Use of sustainable products

gas emissions introduced by the Climate Change (Scotland) Act 2009, which is resilient to the impact of climate change and which leads by example in matters of environmental performance;	School design guidelines Post Project Technical Reviews Key Performance Indicators	Biodiversity
A school estate that is efficiently run and that maximises value for money;	School Estate Management Plan (SEMP) Post Project Technical Review Key Performance Indicators	Utilisation Running Costs Whole Life Costs
A school estate which is flexible and responsive - both to changes in demand for school places and to learners' and teachers' requirements and wishes and where the beneficial impact of change, is maximised by thorough consultation and engagement with users and stakeholders.	School Estate Management Plan (SEMP) User Reference Groups Post Occupancy Reviews	User Satisfaction School design guidelines Project Key Performance Indicators

**Education and Children's Services
Programme and Resourcing Plan**

Project	Scope	Planning/Design	Detailed Design	On Site	Completion Date
Abernethy	major extensions	complete	now	April 2012	July 2013
Alyth PS	new school	by April 2013	2013/14	July 2014	July 2015
Almondbank	redevelopment	by end March 2012	April - Sept 2012	by October 2012	Feb 2013
BHS	Hub	complete	complete	now	end April 2012
Braco/Greenloaning	Nursery	later this year	2013/14	2014/15	2014/15
Crieff PS	New school	now	tbc	2013/14	2014/15
Crieff Road Nursery	redevelopment	complete	complete	Feb 2012	August 2012
Glenlyon	extension	now	2012/13	2012/13	2013/14
Inchtute PS	extension	now	2012/13	2013/14	2014/15
Invergowrie	new school	complete	now	July 2012	July 2013
Kinnoull	extension	complete	now	Feb 2013	Dec 2013
LAL Vision ⁴	Perth ice and water	now	tbc	tbc	tbc
Luncarty PS	extension	now	2012/13	2013/14	2013/14
Oakbank	new school/redev	now	2012/13	2013/14	2014
Oudenarde ⁴	new school	now	tbc	tbc	tbc
Perth Academy Sports ¹	new pitch/hall	now	2012/13	July 2013	July 2014
Perth Academy Upgrade ^{s 2}	ASN and redev	now	2012/13	2012/13/14	various to 2014
Perth Grammar School ³	practical upgrades	now	2012/13	2012/13/14	various to 2014
Perth High School Sports	new hall	complete	now	2013/14	2014/15
Perth Theatre ⁴	redevelopment	now	tbc	tbc	tbc
Rattray	new community facils	now	2012/13	2012/13	2013/14

Notes

1. PA Sports - AWP on site 2012/13, Hall 2013/14
2. PA Upgrades on site 2013/14 General classroom, ASN and sports hall
3. PGS Infrastructure on site 2012/13, practical areas on site 2013/14
4. Funding shown is Council contribution

PERTH & KINROSS COUNCIL
SCHOOL ESTATE CAPITAL EXPENDITURE BUDGET 2012-2017, INCLUDING ADDITIONAL £20 MILLION

PROJECT/NATURE OF EXPENDITURE	Approved Budget 2012/13 (£'000)	Approved Budget 2013/14 (£'000)	Approved Budget 2014/15 (£'000)	Approved Budget 2015/16 (£'000)	Approved Budget 2016/17 (£'000)	Approved Total Budget (£'000)
Almondbank House II	676	0	0	0	210	886
Alyth Primary School - Upgrade Life Expired Building	0	0	6,000	0	0	6,000
Blackford Primary School	0	173	0	0	0	173
Crieff Primary School - School Upgrade Project	662	6,936	5,093	0	0	12,691
Developers Contribution Programme	0	250	0	0	0	250
Dunning Primary School - School Upgrade Project	0	0	285	0	0	285
Invergowrie Primary School - School Upgrade Project	4,915	2,242	0	0	0	7,157
New School Development	0	1,029	0	0	0	1,029
Oakbank Primary School - Upgrade Life Expired Building	0	8,500	0	0	0	8,500
Perth Academy - New Sport Hall	1,000	1,000	0	0	0	2,000
Perth Grammar - Infrastructure/Practical Areas Upgrades	1,750	1,750	0	0	0	3,500
Primary Schools (excluding IIL) Upgrade Programme	1,850	355	495	200	4,717	7,617
Abernethy Primary School Upgrade Project	4,419	56	0	0	0	4,475
Rattray Community Facilities	900	697	0	0	0	1,597
Secondary Schools (excluding IIL) Upgrade Programme	195	900	850	250	2,300	4,495
Blairgowrie High School Upgrade (Phase 2)	118	0	0	0	0	118
Perth High School Upgrade	1,298	0	0	0	0	1,298
TOTAL	17,783	23,888	12,723	450	7,227	62,071

PROJECT PROFILE: New all through School

Project Scope

This school will incorporate a secondary, primary and nursery school on the same site. The building will provide accommodation for 1100 secondary pupils, a two stream primary school and a nursery of 8 full time and 40/40 sessional places.

Cost

The Scottish Future Trust metrics applicable are:

Secondary School - Area allowance

Up to 400 pupils: 13m² per pupil
 401 - 800 pupils: 12m² per pupil
 800 -1200 pupils: 11m² per pupil

Cost allowance: £1900 per m²

Square metre requirement for 1100 pupils:

1100 x 11 = 12100 m²

Funding Requirement:

12100 m² x £1900 = **£22.990.000**

Project Approach

Perth and Kinross Council's approach to developing school buildings is to consider them as integrated community facilities. Spaces within the building are to be dynamic, flexible and capable of use by pupils, parents, partner agencies and the community.

From classrooms to libraries, sports pitches to gym halls, the creative and multiple use of spaces by all members of our community is important to bind schools and communities together and capitalise on the investment made. The creative use of design to inspire, modify and impact on conduct and behaviour creates the opportunity to focus and support academic achievement.

The building will make a clear civic statement about the value the Council places on investing in education and lifelong learning, and will be a focal point for the local community.

PROJECT PROFILE: Tulloch Primary School

Project Scope

This school will replace an existing 14 classroom school in Perth. The building is a CLASP variant that is reaching the end of its useful economic life. The condition of the building was overall rated at B when last assessed this does mask a range of underlying problems that need to be structurally addressed. The suitability of the building for teaching was rated at overall at B although there are a number of areas within the suitability assessment given at C as it limits the flexibility for delivering Curriculum for Excellence.

Cost

The Scottish Future Trust metrics applicable are:

Primary School - Area allowance

Up to 231 pupils: 8.5m² per pupil
232 - 462 pupils: 7.5m² per pupil

Cost allowance: £2350 per m²

Square metre requirement for 434 pupils

$434 \times 7.5 = 3,255 \text{ m}^2$

Funding Requirement

$3,255 \text{ m}^2 \times £2350 = \text{£7,649,250}$

Description of Tulloch Primary School

Tulloch Primary School is a 14 classroom school, however the current capacity is 393 as one of the rooms is in use as support to pupils and families.

The school is a CLASP variant that is showing signs of age damp problems identified in the building and repairs needed in the concrete cladding panels and proprietary joints at high and low levels. The current classification of condition at B is a consequence of the continued investment that has been made within the building to maintain operation however the cause of dampness in the building remains under investigation.

The assessment of suitability of the building is given as an overall B. However there are a number of important areas of the school that are rated C: the environmental conditions, covering temperature, acoustics and controllability of the general learning and teaching spaces and the functionality of the internal facilities and social spaces.

CASE STUDIES

Almondbank House

Background

Almondbank House provides a facility offering integrated support to vulnerable children and their families. The facility also provides a nurture base for a small number of primary age children whose needs cannot be met wholly through current mainstream provision. In addition residential/respite care (which can include work with the whole family) is available for up to 4 children in a house within the same 'campus'.

In other Councils, such provision is generally delivered from a number of centres. Our new building provides all these facilities under one roof. It is beginning to prove successful in generating further ways of working, building on the sharing of skills of partner agencies.

Working together we are delivering a wide range of services from Almondbank House, with the Community Support / Residential - Social Work Early Years Team, Primary Behaviour Support, Barnardo's and Hopscotch (who work with children affected by parental substance misuse).

The Development Officer for Managing Challenging Behaviour and Looked After Coordinator, Parent to Parent, Children First and other visiting specialists such as psychologists will shortly have a base at Almondbank. A shared administrative support team is permanently based there.

Almondbank House also provides an up-to-date interview suite for children undergoing joint Police / Social Work Child Protection investigations, and case conference facilities.

Consultation

A number of specialist advisors were consulted on the design of this establishment, including representatives of the Scottish Institute for Residential Childcare and the Care Commission, as well as Council childcare and education professionals.

The design was developed in-house by the Council's Property Division Construction Team supported by the construction partner Morrison Construction Ltd, working alongside the Education & Children's Services Projects Support Team.

The support of neighbours, the local community and tenant association representatives was greatly appreciated.

Project Team

The partnering team included Education & Children's Services' Projects Support Team representatives, Design Team representatives, Construction Team representatives and the CDM Co-ordinator.

Award

This project was awarded Silver in Perth & Kinross Council's 'Securing the Future Awards 2009' in the category 'Improving Services through Partnership'.

Key Project Data

Name of Establishment	Almondbank House
Location	Lewis Place, Perth PH1 3BD
Procurement	Traditional partnering
On site start date	April 2008
Occupation date	19 December 2008

Aytoun Hall

Background

Aytoun Hall and the adjacent Giral House in the High Street at Auchterarder, Perthshire PH3 1BJ is a category 'B' listed building dating from 1830. The hall and associated rooms serve as a community facility while the Giral House is mainly a local Perth & Kinross Council office.

Consultation

The Council worked in close partnership with representatives from Auchterarder Leisure and Recreation Association (ALRA) in developing the plans for the refurbishment. The plans were subsequently shared with the wider community at a public meeting held in April 2009.

The refurbishment focused on the following areas:

- Ensure compliance with current legislation
- Upgrade utilities thereby reducing operating costs
- General upgrade to kitchen and toilet areas
- General redecoration throughout
- Return areas currently out of bounds to reuse
- Provide accommodation for all current users of the building

Scope of Works

The refurbishment of both the Aytoun Hall and the adjacent Giral House included the demolition and rebuild of a link building between the Giral House and the smaller hall to the rear. Structural openings were formed along with a full mechanical and electrical infrastructure replacement. Fabric repairs and full redecoration of the premises were carried out. New toilet facilities and accessible lifts were installed. In addition a new sound and lighting system was included as part of the works.

Outcomes

The effective liaison with the community through ALRA and Council Officers has allowed the delivery of a sustainable facility for the many and varied user groups and potential customers for the future. The demand for use of the Hall and ancillary accommodation and the modern facilities has created a local stimulus for new groups to emerge. The buildings are now well heated and lit with state of the art controls such that energy consumption has been minimised whilst offering optimum comfort for the users – heating zone controls provide more flexible heating arrangements to match specific demands of users. This will be more energy efficient and more economic.

Project Team

The partnering team included the Service Manager Cultural & Community Services, ECS Projects Support Team representatives, Design Team representatives, Construction Team representatives and the CDMC Co-ordinator. Mansell Construction was appointed as the construction partner.

Award Winner

This project was awarded Bronze in the category 'Working with Communities' in Perth & Kinross Council's 'Securing the Future Awards 2011'.

Key Project Data

Name of establishment	Aytoun Hall
Sector	Cultural and Community Services
Location	Main Street, Auchterarder
Procurement	Traditional partnering
On site start date	March 2010
Occupation date	December 2010

**Perth and Kinross Council
SFT Phase 3 Bid
High Level Risk Plan**

Risk Description	Impact (High/ Med/ Low)	Probability (High/ Med/ Low)	Action Plan to mitigate risk
1. Failure to secure sufficient land from developer	High	Low	Early consultation with developer to ensure sufficient land is identified within masterplan.
2. Insufficient capital funding	High	Low	a) Clarity of brief and costs from outset and use of benchmarking to ensure value for money is achieved. b) Review brief to meet available funding. c) Seek additional funding.
3. Insufficient revenue funding	High	Medium	Early recognition of budget pressure and develop revenue strategy to meet financial requirements.
4. Legal and/or statutory issues prevent delivery within timescale	Low	Low	Develop and share an early programme with relevant professionals across the Council to identify any critical points and make realistic provision.
5. Lack of involvement of stakeholders	Medium	Low	Use the consultation and communication plan to inform and involve all stakeholders.
6. Statutory consultation exercise timescale	High	Low	From inception ensure sufficient time is allowed within the programme to undertake a statutory consultation exercise.

