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Council Building
2 High Street
Perth
PH1 5PH

24/01/2022

A meeting of the **Lifelong Learning Committee** will be held virtually on **Monday, 31 January 2022** at **09:30**.

If you have any queries please contact Committee Services on (01738) 475000 or email Committee@pkc.gov.uk.

THOMAS GLEN
Chief Executive

Those attending the meeting are requested to ensure that all notifications are silent on their device and other devices are in silent mode.

Please note that the meeting will be broadcast online and recorded. The recording will be publicly available on the Council's website following the meeting.

Members:

Councillor Caroline Shiers (Convener)
Councillor John Duff (Vice-Convener)
Mr Andy Charlton
Adrian Ferguson
Mr Martin Gowrie
Mrs Audrey McAuley
Prof Teresa Moran
Carolyn Weston
Councillor Kathleen Baird
Councillor Liz Barrett
Councillor Angus Forbes
Councillor Ian Massie
Councillor Xander McDade
Councillor Beth Pover
Councillor Callum Purves
Councillor John Rebbeck

Councillor Crawford Reid
Councillor Fiona Sarwar
Councillor Lewis Simpson

Lifelong Learning Committee

Monday, 31 January 2022

AGENDA

MEMBERS ARE REMINDED OF THEIR OBLIGATION TO DECLARE ANY FINANCIAL OR NON-FINANCIAL INTEREST WHICH THEY MAY HAVE IN ANY ITEM ON THIS AGENDA IN ACCORDANCE WITH THE COUNCILLORS' CODE OF CONDUCT.

- 1 WELCOME AND APOLOGIES/SUBSTITUTES**
- 2 DECLARATIONS OF INTEREST**
- 3 MINUTES**
 - 3(i) MINUTE OF MEETING OF LIFELONG LEARNING COMMITTEE OF 3 NOVEMBER 2021 FOR APPROVAL** 7 - 10
(copy herewith)
 - 3(ii) MINUTE OF MEETING OF THE EXECUTIVE SUB-COMMITTEE OF LIFELONG LEARNING COMMITTEE OF 2 NOVEMBER 2020 FOR NOTING** 11 - 14
(copy herewith)
 - 3(iii) MINUTE OF MEETING OF JOINT NEGOTIATING COMMITTEE FOR TEACHING STAFF OF 21 SEPTEMBER 2021 FOR NOTING** 15 - 18
(copy herewith)
 - 3(iv) MINUTE OF MEETING OF CHILDREN, YOUNG PEOPLE AND FAMILIES PARTNERSHIP OF 18 JUNE 2021 FOR NOTING** 19 - 22
(copy herewith)
- 4 REVIEW OF DEVOLVED SCHOOL MANAGEMENT** 23 - 106
Report by Executive Director (Education and Children's Services)
(copy herewith 22/21)
- 5 SCHOOL ESTATE TRANSFORMATION PROGRAMME - CLEISH PRIMARY SCHOOL** 107 - 126
Report by Executive Director (Education and Children's Services)
(copy herewith 22/22)
- 6 SCHOOL NAMING CONSULTATION FOR THE NEW PRIMARY SCHOOL AT NORTH MUIRTON** 127 - 134

Report by Executive Director (Education and Children's Services)
(copy herewith 22/23)

7 LIFELONG LEARNING COMMITTEE - NON COUNCIL MEMBER

The Committee is asked to note the appointment of Mrs Margaret Conroy as the Church of Scotland representative on Lifelong Learning Committee

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LIFELONG LEARNING COMMITTEE

Minute of meeting of the Lifelong Learning Committee held virtually on Wednesday 3 November 2021 at 9.30am.

Present: Councillors C Shiers, J Duff, K Baird, L Barrett, A Forbes, I Massie, R McCall (substituting for Councillor C Purves), X McDade, B Pover, J Rebbeck, C Reid, F Sarwar and L Simpson; Mr A Charlton, Mrs A McAuley, Professor T Moran, and Mrs C Weston.

In attendance: S Devlin, Executive Director (Education and Children's Services); J Pepper, Depute Director (Education and Children's Services); G Boland, S Johnston, F Mackay, D Macluskey, S Turner, K Robertson, and C Taylor (all Education and Children's Services); F Robertson and M Fraser (Communities); C Flynn, L Brown, A Brown and M Pasternak (all Corporate and Democratic Services).

Apologies for absence: Councillor C Purves, Mr A Ferguson and Mr M Gowrie.

Councillor C Shiers, Convener, Presiding.

The Convener led on Items 1-5 and 8, the Vice-Convener led on Items 6-7.

1. WELCOME AND APOLOGIES

The Convener welcomed all those present to the meeting. Apologies for absence were noted as above.

2. DECLARATIONS OF INTEREST

There were no declarations of interest made in terms of the Councillors' Code of Conduct.

3. MINUTES

(i) Lifelong Learning Committee

The minute of meeting of the Lifelong Learning Committee of 25 August 2021 was submitted, approved as a correct record and authorised for signature.

(ii) Joint Negotiating Committee for Teaching Staff

The minute of meeting of the Joint Negotiating Committee for Teaching Staff of 15 June 2021 was submitted and noted.

4. EDUCATION AND CHILDREN'S SERVICES JOINT BUSINESS MANAGEMENT AND IMPROVEMENT PLAN 2021/22 AND ANNUAL PERFORMANCE REPORT 2020/21

There was submitted a report by the Executive Director (Education and Children's Services) (21/158) (1) presenting the Business Management and

Improvement Plan (BMIP) for 2021/22 and Annual Performance Report 2020/21 for Education and Children's Services; (2) providing a report on progress, performance against key performance indicators; and (3) setting out priorities for the current year.

Resolved:

The Education and Children's Services Business Management and Improvement Plan (BMIP) for 2021/22 and Annual Performance Report 2020/21 be approved.

5. ATTAINMENT AND PUPIL EQUITY FUNDING UPDATE 2021

There was submitted a report by the Executive Director (Education and Children's Services) (21/201) (1) providing an update on progress made in Perth and Kinross to raise attainment and close the poverty-related attainment gap; (2) outlining the range of measures implemented to improve performance and monitor progress of improvements, including the use of Pupil Equity Funding (PEF) to support children and young people. This meets the requirements to report on the National Improvement Framework (NIF) for education and on the expenditure and impact of the Pupil Equity Fund.

Resolved:

The contents of Report 21/201 be noted.

6. LEARNING ESTATE STRATEGY AND LEARNING ESTATE MANAGEMENT PLAN

There was submitted a report by the Executive Director (Education and Children's Services) (21/202) seeking approval of (1) the Perth and Kinross Learning Estate Strategy; and (2) the Learning Estate Management Plan (LEMP).

Resolved:

- (i) It be noted that the management of the Learning Estate in Perth and Kinross aligns well with the national Learning Estate Strategy.
- (ii) It be noted that there are plans that the Learning Estate Strategy aligns with, and complements, the Council's Investment Blueprint. The Learning Estate Strategy will help to inform development of the Council's Corporate Asset Management Strategy.
- (iii) The Perth and Kinross Learning Estate Strategy, as Appendix 1 to Report 21/202, be approved.
- (iv) The Perth and Kinross Learning Estate Management Plan (LEMP), as Appendix 2 to Report 21/202, be approved.
- (v) The revised capacities, in paragraph 2.8 of Report 21/202, which are detailed in the LEMP, be approved.

THERE FOLLOWED A SHORT RECESS.
THE COMMITTEE RECONVENED AT 10.55AM.

7. DUAL SECONDARY SCHOOL CATCHMENT AREA – KIRKMICHAEL PRIMARY SCHOOL

There was submitted a report by the Executive Director (Education and Children's Services) (21/203) presenting the outcome of a scoping exercise,

undertaken at the request of the Lifelong Learning Committee, on the possibility of making Kirkmichael Primary School catchment area a dual catchment area for both Blairgowrie High School and Pitlochry High School with the purpose of increasing the school roll at Pitlochry High School.

Resolved:

- (i) It be noted that the pupil roll at Pitlochry High School is projected to increase without the introduction of a dual catchment.
- (ii) The outcome of the survey undertaken with parents/carers of pupils currently attending Kirkmichael Primary School be noted.
- (iii) It be noted that establishing a dual catchment area for Pitlochry High School and Blairgowrie High School for Kirkmichael Primary School, would not achieve the objective of increasing the school roll at Pitlochry High School significantly over the next 6 years, based on the survey results;
- (iv) It be noted that there is the possibility of detriment to Blairgowrie High School, if there is a reduction in pupil numbers, due to an incremental reduction in staffing.
- (v) The challenges and additional costs associated with travel to Pitlochry High School and Breadalbane Academy be noted.
- (vi) The retention of the existing secondary catchment arrangements between Kirkmichael Primary School and Blairgowrie High School be approved.

In terms of Standing Order 22, Councillor X McDade requested that his dissent be recorded to the decision taken.

8. COMMUNITY LEARNING AND DEVELOPMENT PLAN 2021-2024

There was submitted a report by the Executive Director (Education and Children's Services) (21/204) seeking approval of the new Community Learning and Development (CLD) Plan 2021-2024 and noting of the final performance report of the 2019-2021 CLD Plan.

Resolved:

- (i) The performance report for the CLD Plan 2019-21, at Appendix 1 to Report 21/204, be noted.
- (ii) The draft CLD Plan 2021-24, at Appendix 2 to Report 21/204, be approved.
- (iii) An annual update on the CLD Plan returning to Lifelong Learning Committee be agreed.

EXECUTIVE SUB-COMMITTEE OF THE LIFELONG LEARNING COMMITTEE

Minute of Meeting of the Executive Sub-Committee of the Lifelong Learning Committee held virtually on Monday 2 November 2020 at 9.30am.

Present: Councillors C Shiers, J Duff, X McDade, J Rebbeck and F Sarwar.

In Attendance: S Johnston, Head of Education and Learning, J Chiles, G Doogan, B Martin-Scott; L Richards, A Carr, D Henderson, G Knox, A Lemon, F Mackay, D MacLeod, D Macluskey, K Ramsay, S Ross, F Robertson, N Thomson, L Verdot, A Burns, J Campbell, J Savage and R Monro (all Education and Children's Services) and C Irons (Corporate and Democratic Services).

Also in Attendance: A Brown, M Pasternak, L McGuigan and B Parker (all Corporate and Democratic Services)

Councillor C Shiers, Convener, Presiding.

1. WELCOME AND APOLOGIES

The Convener welcomed all those present to the meeting. There were no apologies for absence.

2. DECLARATIONS OF INTEREST

There were no declarations of interest made in terms of the Councillors' Code of Conduct.

3. MINUTE OF PREVIOUS MEETING

The minute of meeting of the Executive Sub-Committee of the Lifelong Learning Committee of 27 January 2020 was submitted, approved as a correct record and authorised for signature.

S Johnston advised the new senior officer from Education Scotland had been invited to attend a future meeting of the sub-committee.

4. STANDARDS AND QUALITY IN SCHOOLS, LEARNING COMMUNITIES AND PRE-SCHOOL CENTRES/DAY CARE OF CHILDREN

There was submitted a report by the Executive Director (Education and Children's Services) (20/205), setting out the key findings following inspections of pre-school centres and schools undertaken by Education Scotland and, by exception, Care Inspectorate inspections on the day care of children since the Executive Sub-Committee of Lifelong Learning Committee on 27 January 2020.

It was noted that appendices 3 and 4 to Report 20/205 had been updated by appendices 6 and 7 to Report 20/206.

It was noted the Service Manager, Quality Improvement Officer and Head Teacher for both schools were in attendance.

Resolved:

Having heard from the relevant officers on the key findings of the inspection and following consideration and questions from the sub-committee the reports as appended to Report 20/205 be noted as follows:

- (a) Braco Primary School and Nursery Class (Appendix 1)
- (b) Perth Grammar School (Appendix 2)

5. STANDARDS AND QUALITY IN SCHOOLS, LEARNING COMMUNITIES AND PRE-SCHOOL CENTRES/DAY CARE OF CHILDREN

There was submitted a report by the Executive Director (Education and Children's Services) (20/206) setting out the key findings following inspections of early learning and childcare settings and schools undertaken by Education Scotland and, by exception, Care Inspectorate inspections on the day care of children since the previous report (Report 20/205) which covered inspections up to March 2020.

It was noted the Service Manager, Quality Improvement Officer and Head Teacher for each school were in attendance.

THERE WAS A RECESS DURING CONSIDERATION OF THIS ITEM AND THE MEETING RECONVENED AT 11.00AM.

Resolved:

- (i) Having heard from the relevant officers on the key findings of the inspection and following consideration and questions from the sub-committee, the reports as appended to Report 20/206 be noted as follows:
 - (a) Letham Primary School and Nursery Class (known as Early Childhood Centre) (Appendix 1)
 - (b) Fairview School and Nursery Class (Appendix 2)
 - (c) North Muirton Primary School and Nursery Class (Appendix 3)
 - (d) St Madoes Primary School and Nursery Class (Appendix 4)
 - (e) Inchtute Primary School and Nursery Class (Appendix 5)
 - (f) Summary of Education Scotland Inspections (Appendix 6)
 - (g) Summary of Care Inspectorate Day Care of Children Inspections (Appendix 7)
- (ii) It be noted that the Care Inspectorate Senior representative for Perth and Kinross had been invited to a future meeting to give a presentation on the National Care Standard.

6. INSPECTION OF SERVICES FOR CHILDREN AND YOUNG PEOPLE BY THE CARE INSPECTORATE

There was submitted a report by the Executive Director (Education and Children's Services) (20/207) on the key findings following the unannounced inspection of the Council's Woodlea Cottage which was carried out and published in March 2020 by the Care Inspectorate.

It was noted the Service Manager and Senior Practitioner were in attendance.

Resolved:

Having heard from the relevant officers on the key findings of the inspection and following consideration and questions from the sub-committee, the report as appended to Report 20/207, be noted.

JOINT NEGOTIATING COMMITTEE FOR TEACHING STAFF

Minute of virtual meeting of the Joint Negotiating Committee for Teaching Staff (JNCT) held via Microsoft Teams on Tuesday 21 September 2021 at 2.30pm.

Present: **Representing Perth and Kinross Council**
Councillors J Duff and J Rebbeck; S Devlin, S Johnston, M Donaghy, J Donnelly, A Lemon, and D Macluskey (all Education and Children’s Services); P Johnstone (Corporate & Democratic Services).

Representing Teachers’ Associations
S Dowling, L Gibb, LJ Grant, M Laurie, T Summers, and C Weston (all EIS); M Mackie (SSTA) and S Topen-Cooper (NASUWT).

In Attendance: F Mackay, B Martin-Scott (all Education & Children’s Services); A McAuley, Joint Secretary (Trade Unions); C Flynn, Joint Secretary (Management Side) and L Brown (Corporate and Democratic Services).

Apologies: Councillor Shiers, G Doogan, M Taylor and C Rose.

Councillor J Duff, Convener, Presiding.

1. APOLOGIES FOR ABSENCE

Apologies for absence were submitted and noted as above.

2. DECLARATIONS OF INTEREST (ELECTED MEMBERS ONLY)

There were no declarations of interest made in terms of the Councillors’ Code of Conduct.

3. MINUTES

The minute of meeting of the Joint Negotiating Committee for Teaching Staff of 15 June 2021 was submitted and approved as a correct record.

4. MATTERS ARISING

(i) Primary Staffing Standards Update (Item 8 refers)

S Johnston reported that full implementation of the primary staffing standards will commence from August 2022. Two meetings will shortly be arranged with the Trade Unions firstly in relation to how the changes will affect Depute Head Teachers and secondly in relation to any movement within primary schools where teachers who are taking a class might have to be moved or take on a different role because Depute Head Teachers might be covering classes. A staff consultation plan is currently in development.

The Committee noted the position.

5. NATIONAL UPDATE

S Devlin provided an update on the Programme for Government (PFG) which builds on the commitments that were set out in the First Steps/100 days document which was published following the Elections held in May 2021 and which set out a raft of work to be taken forward during this parliamentary term.

Key areas of relevance to the Committee from the PFG included the investment of £1 billion to tackle the poverty related attainment gap in schools - looking at a different model of funding for all 32 local authorities, consultation on the future model still ongoing.

A number of important reviews are underway nationally which the Council will be participating in and responding to, these include the National Care Service Review and the OECD Review. In terms of the National Care Service Review which looks to establish a National Care Service by 2022 there is currently a consultation on the Review which is open until 2 November 2021. Any individual or organisation is able to make a contribution to that consultation.

School inspections will resume across Scotland from September 2021. Initially the focus will be on outstanding return inspections that were put on hold because of the pandemic. There will also be some thematic inspections undertaken between now and December 2021 where the focus will be on children and young people's health and wellbeing, approaches to outdoor learning adopted by schools and about the Covid 19 response. From January 2022 the focus on inspections will be in the 4 core Quality Indicators.

Education Scotland advised no additional paperwork will be requested; however, they do want to see any recovery plans schools and local authorities might have in place. The Education Service will be advising Education Scotland if it is felt that any planned inspection should not proceed at the expected time.

S Devlin concluded her update by expressing her sincere gratitude to everyone for their continued efforts to ensure that they keep themselves and others as safe as possible. She emphasised the need to be realistic, Covid has not gone away, history shows on average a pandemic lasts around 5 years. Staff will continue to have to work in this volatile and ever changing environment for some time therefore everyone needs to ensure they continue to do so as safely as possible.

The Committee noted the position.

6. SQA – ALTERNATIVE CERTIFICATION MODEL (ACM)

There was submitted a briefing paper by D Macluskey on the delivery of the Alternative Certification Model across schools in Perth and Kinross (G/21/118). He advised the structure and processes that were established to ensure effective delivery of the ACM last year remain in place, namely co-ordination and support via Subject Networks, designated time during In-service Days and Quality Assurance guidance and support from the Council's central team.

The secondary team continue to liaise with Education Scotland, SQA and Scottish Government while working with staff across schools to support the implementation and recommendations highlighted in the recent OECD report on Scottish Education's future approach to assessment and qualifications.

C Weston welcomed the positive comments in relation to staff contained in the report but sought an assurance that given the high workload involved that support is there for secondary teachers going forward. D Macluskey confirmed staff will continue to receive support going forward.

Thanks were conveyed to all teaching staff for the hard work and dedication shown to young people and learners over the course of the pandemic and in particular for their efforts in regard to assessments.

The Committee noted the terms of the report.

7. COVID-19 UPDATE SEPTEMBER 2021

There was submitted a paper by L Hamilton providing an update on Education and Children's Services Covid-19 Recovery Plan as of September 2021(G/21/119).

In response to a question on providing evidence that a PCR test has been carried out after a period of self-isolation, L Hamilton advised pupils are asked to confirm that they have had a PCR test before any return to school. The results are taken on trust as the school are unable to request hard evidence of confidential medical information. In terms of a positive result once the 10 days of isolation have passed if there are no symptoms the pupil is free to return to school. The pupil would not be asked to take any further tests at that stage.

C Weston welcomed the programme to install CO₂ monitors in schools and noted that this will be completed by the October break. In response to a request for clarification on installation in learning and teaching areas S Devlin advised that desk top modelling on air flow and ventilation had been carried out some time ago in Perth and Kinross and the spaces were deemed safe learning and teaching spaces for up to 30 pupils. The further modelling now taking place is for use by larger numbers.

In response to a further question on the cost implications should a need for additional ventilation be identified, S Devlin advised that Covid monies had already been recognised nationally. The funding received from Scottish Government had enabled the Council to undertake some of the approaches described within the COVID-19 update report. In addition to this the Council had agreed additional funding to assist with the ventilation and CO₂ monitoring strategy. It was important to note that not all schools in Perth and Kinross will require CO₂ monitors. Some of the Council's newest builds have mechanical ventilation which has been modelled and is considered to be more than appropriate. Any refurbishment work or new builds will have the most modern ventilation built in.

S Johnston added although there is guidance available to schools on monitors, colleagues in Property Services have identified a group of monitors that have

been wrongly measured in terms of their thresholds with some monitors remaining on “red “even though windows have been opened. Property services and now working to ensure these monitors are set to the correct levels.

It was noted that current national guidance on ventilation and CO₂ monitoring is predicated on the Perth and Kinross model.

The Committee note the COVID-19 update for September 2021.

8. INCIDENTS OF VIOLENCE OR AGGRESSION INCIDENTS OF DISTRESSED/CHALLENGING BEHAVIOUR – QUARTERLY REPORT – TERM 4 (19 APRIL – 24 JUNE 2021)

There was submitted a report by the Executive Director (Education & Children’s Services) (G/21/120) providing a summary of the information gathered in relation to incidents in schools and other educational settings which result in an emotional or physical impact on a member of staff for the period 19 April to 24 June 2021 (Term 4).

M Laurie advised the Teachers side appreciated all the work that has gone into the new reporting style and the work that the Short Life Working Group (SLWG) has undertaken. The Teachers side appreciated it will be an ongoing process and the SLWG continue. The new data presentation format is much easier to read and provides a breakdown of the data in a useful way. The actions at the end of the report are particularly welcome and very useful.

The Committee noted the quarterly report for the period 19 April to 24 June 2021 (Term 4).

9. ANNUAL LEAVE CALENDAR 2021/2022

There was submitted for information the annual leave calendar for 2021/2022 (G/21/121).

P Johnstone advised the calendar will be subject to change as a date for the Jubilee Holiday has still to be finalised.

C Weston enquired if it was known when clarification would be received on the date of the Jubilee Holiday. In response P Johnstone advised trade unions had been consulted on this, however, only the EIS had responded by the closing date of 17 September. A report now requires to be submitted to Council and the report must include trade unions comments.

The Committee noted the position.

10. ANY OTHER COMPETENT BUSINESS

There were no other items of business raised for discussion.

11. DATE OF NEXT MEETING

7 December 2021.



CHILDREN, YOUNG PEOPLE AND FAMILIES PARTNERSHIP

Minute of virtual meeting of the Children, Young People and Families Partnership held on Friday 18 June 2021 at 10.00am.

Present: Councillor C Shiers, PKC
 S Devlin, Executive Director (Education and Children's Services), PKC
 S Johnston, Head of Education and Learning, PKC
 J Pepper, Depute Director (Education and Children's Services) and Chief Social Work Officer, PKC
 H Robertson, Head of Services for Children, Young People and Families, Perth and Kinross Council.
 B Atkinson, Independent Chair of Child Protection Committee
 C Wilson, PKAVS Third Sector (substituting for H Zang)

In Attendance: P Davison; L Haxton; C Mackie; M Nicol; D Stokoe; and D Williams (all PKC); and Dr W Cook (NHS Tayside).

Apologies: Councillors J Duff and J Rebbeck; B Renton (PKC); and H Zang, PKAVS Third Sector.

S Devlin in the Chair

1. WELCOME AND APOLOGIES FOR ABSENCE

S Devlin welcomed everyone to the meeting. Apologies for absence were submitted and noted as above.

It was noted that John Cunningham would replace Kate Pacholek as the representative on the Partnership for the Scottish Children's Reporter Administration, although he was not in attendance at this meeting.

2. DECLARATIONS OF INTEREST

There were no declarations of interest in terms of the relevant Codes of Conduct.

3. MINUTE OF PREVIOUS MEETING

The minute of the meeting of the Children, Young People and Families Partnership of 8 April 2021 was submitted and noted as a correct record.

4. MATTERS ARISING

J Pepper advised that, during lockdown, PKC supported the establishment of a youth engagement team in Perth, which was taking a proactive approach to engagement with Young People and had received funding through to October. Councillor Shiers commended the approach and response from young people.

6. BUSINESS ACTIVITY OF THE PERTH AND KINROSS CHILD PROTECTION COMMITTEE

6(i) VERBAL UPDATE

B Atkinson, Independent Chair, Perth and Kinross Child Protection Committee (CPC), delivered a verbal update on the business activity of the Perth and Kinross Child Protection Committee since the previous meeting of the Children, Young People and Families Partnership.

B Atkinson advised that the CPC had been supporting practitioners on intervention with regards to the Children (Equal Protection from Assault) Act 2019, with work ongoing in order to achieve a multi-agency approach. He further advised that additional work was also being undertaken to find safe spaces in extreme child protection cases under the Age of Criminal Responsibility Act 2020.

B Atkinson also advised members that the CPC was presently undertaking a significant case review, with the family invited to be involved, and details of this review were published on the CPC website. He further advised that new learning review guidance was also due to be published.

DR W COOK JOINED THE MEETING AT THIS POINT

5. THE TAYSIDE CHILD HEALTHY WEIGHT STRATEGY

Dr W Cook, NHS Tayside, delivered a slide-based presentation to members regarding the Tayside Child Healthy Weight Strategy. During the presentation, Dr Cook highlighted to members that children in disadvantaged areas were twice as likely to be at risk of obesity, and furthermore highlighted the impact of obesity on physical and mental wellbeing, and that children with obesity were more likely to be excluded from activities. Dr Cook added that it was recognised that this was not an issue that any one organisation could solve, and required a whole systems approach, with obesity referenced as a socio-economic outcome.

H Robertson further highlighted the importance of a whole systems approach in this regard and highlighted the impact of low cost and high calorie food in disadvantaged areas, with Dr Cook adding that a concentration of high calorie food outlets were often found near schools. Councillor Shiers highlighted work undertaken in Rattray, looking at working with local producers to get local produce into the area, and advised of the potential of looking at this work through Local Action Partnerships.

In response to a query from S Devlin, Dr Cook advised that the core working group in this regard was part of the Tayside Regional Improvement Collaborative, and whilst there was presently no Perth and Kinross or Angus representative on the core working group, work had been undertaken with colleagues in Perth and Kinross and Angus.

DR W COOK LEFT THE MEETING AT THIS POINT

THE AGENDA REVERTED TO THE FORMALISED ORDER AT THIS POINT

6(ii) PRIORITIES FOR PRACTICE CONFERENCE MAY 2021

There was submitted a report (G/21/87) detailing the Priorities for Practice, and slide-based presentation delivered by M Nicol, Tayside Regional Improvement Collaborative, detailing the six established Priorities for Practice and updating members on the Priorities for Practice Conference of May 2021. An accompanying video presentation was also shown to members.

S Devlin thanked M Nicol for the presentation and praised the accessible fashion of the information presented to members. S Devlin also highlighted the importance of workforce development in the successful delivery of these priorities, and further highlighted the importance of understanding roles and empowering the workforce. In response, M Nicol advised members that work on outcomes was already underway, adding that this was a three year program, for which the careful pacing of the program and the development of cultural change would be central.

B Atkinson added that application and effectiveness across partners would be key to the successful delivery of these priorities and highlighted the impact that this could have on successful outcomes.

The Partnership:

- (i) Noted the information as set out in Report G/21/87.

M NICOL LEFT THE MEETING AT THIS POINT

7. TAYSIDE REGIONAL IMPROVEMENT COLLABORATIVE UPDATE

S Devlin, Executive Director (Education and Children's Services), delivered a verbal update to members regarding the Tayside Regional Improvement Collaborative.

S Devlin advised members that the Integrated Plan 2017-20 had been extended due to the COVID-19 Pandemic, but further advised that reports for the first two years had been submitted to the Scottish Government, and reporting on the third year was being finalised. With regards to Priority Group 4, S Devlin advised members that the successful delivery of The Promise did not rest solely on this Priority Group.

8. CHILDREN'S SERVICES PLANNING STRATEGIC LEADS NETWORK – TERMS OF REFERENCE

There was submitted to members the Children's Services Planning Strategic Leads Network Terms of Reference (G/21/88), alongside a verbal presentation from H Robertson, Head of Services for Children, Young People and Families, Perth and Kinross Council.

H Robertson advised members that the actions of the network in this regard had been shared with the Deputy First Minister, and that the submitted paper (G/21/88) outlined the review criteria for the Children's Plan. H Robertson further advised that this was considered a chance to revisit GIRFEC practice and added that the criteria focused upon early intervention. H Robertson highlighted the

importance of establishing a link between this work and the Perth and Kinross Offer.

The Partnership:

(i) Noted the information as set out in G/21/88.

9. COMMUNITY PLANNING PARTNERSHIP AND LOCAL OUTCOME IMPROVEMENT PLAN

L Haxton and D Stokoe, Perth and Kinross Council, delivered a slide-based presentation on the Community Planning Partnership and Local Outcome Improvement Plan.

During the presentation, D Stokoe advised that the COVID-19 Pandemic had brought inequalities into sharp focus, and also that mental wellbeing had been heavily highlighted as an issue. He further advised members that the Community Planning Partnership Board should be operating with a view to shaping, adding value and leading on work around these issues. S Devlin highlighted the potential for increased collaborative work and communication between the Community Planning Partnership Board and the Children, Young People and Families Partnership, and the potential connectivity around the children's agenda and the Community Planning Partnership.

L Haxton highlighted the need for the Local Outcome Improvement Plan to be a live document to be at its most effective, with B Atkinson adding that there was value in getting the most out of all partners involved. D Stokoe added that, whilst inequalities are challenging, there is a strong asset base available in communities.

10. THEMATIC APPROACH TO PERFORMANCE REPORTING

There was submitted a report (G/21/89) by the Executive Director (Education and Children's Services), continuing the thematic reporting plan for performance and outcome information focused on children, young people and families. It sets out a suite of information around the second of the themes, namely Outcomes for Vulnerable Children, for consideration by the Partnership.

P Davison advised members that there was a need to investigate further on unknown care leavers, highlighting the importance of knowing what young people are doing.

The Partnership:

(i) Noted the information as set out Report G/21/89.

11. ANY OTHER COMPETENT BUSINESS

There was no other business for discussion.

12. DATE OF NEXT MEETING

The Partnership noted the next meeting would be held on Friday 17 September 2021.

PERTH AND KINROSS COUNCIL**Lifelong Learning Committee****31 January 2022****REVIEW OF DEVOLVED SCHOOL MANAGEMENT****Report by Executive Director (Education and Children's Services)****(Report No. 22/21)****PURPOSE OF REPORT**

This report proposes changes to the Perth and Kinross Council's Devolved School Management (DSM) Scheme as a result of Scottish Government revised National Framework and Guidelines. This required Councils to undertake a review of their current scheme in light of the revised [National Framework and Guidelines](#) and produce a revised DSM Scheme by April 2022.

1. BACKGROUND/MAIN ISSUES**1.1 National Context**

- 1.2 Devolved School Management (DSM) was introduced in 1993 to enhance and improve the management of resources at school level. The DSM guidance was reviewed nationally in 2006 and again in 2012, taking account of the changing economic and financial climate for both local authorities and the Scottish Government. In June 2017, the Scottish Government consulted on changes to DSM as part of the wider 'Fair Funding to Achieve Excellence and Equity in Education' consultation.
- 1.3 As part of this consultation, it was agreed to consult on changes to the scheme to support the empowerment of Headteachers and the closing of the attainment gap. This consultation work was concluded in 2019.
- 1.4 The updated [2019 DSM Guidelines](#), sought to build and improve on the DSM Guidelines of 2012. One of the main changes in the new guidelines is that it identifies which areas are defined as expected, or as recommended, for inclusion within local authority schemes.
- 1.5 The Scottish Government initially stated that all local authorities should review their DSM Scheme by April 2021 to bring in line with the 2019 guidelines. Due to the COVID-19 pandemic, this date was extended to April 2022. This will mean new schemes will be used for budget and resource allocations to schools from April 2022.

Updated DSM Guidelines

- 1.6 The updated DSM principles, agreed by the Fair Funding Reference Group, and building on and enhancing the foundations and principles of the 2012 guidance, are:
- Subsidiarity and Empowerment;
 - Collaboration;
 - Accountability and Responsibility; and
 - Clarity and Equity.
- 1.7 These principles reflect the National Framework aims of excellence through raising attainment and achieving equity. The principles also fully endorse those proposed in the Fair Funding consultation:
- Support excellence and equity;
 - Be fair;
 - Be simple, transparent and predictable; and
 - Deliver value for money.
- 1.8 The Guidelines provided a framework to allow local authorities to populate a standard format which will introduce a level of consistency in how schemes are presented and support benchmarking. They also clarified what is expected and recommended in a local scheme and provided practical examples from local authorities.
- 1.9 These guidelines/framework were reviewed and compared to the current Perth and Kinross DSM Scheme and revisions were made as appropriate.

2. WORK TO DATE

2.1 Revised DSM Documentation

- 2.1.1 A short life working group met a number of times to review any revisions needed for the Perth and Kinross Council's DSM Scheme to comply with the new national DSM Guidelines. This working group was made up of senior leadership from a wide variety of schools, Council Officers from Education and Children's Services (ECS), Finance and Human Resources.
- 2.1.2 Meetings also took place with Dundee City Council and Angus Council (Tayside Regional Improvement Collaborative group) to ensure a similar approach across the neighbouring local authorities.
- 2.1.3 The Perth and Kinross Council DSM Scheme document has now been reviewed and revised. The revised DSM Scheme document is attached as Appendix A.
- 2.1.4 The existing Perth and Kinross Council DSM Scheme was found to be comprehensive and robust and therefore, only minimal changes to the revised scheme were required. The minimal changes are detailed below:

- Providing details of the DSM Scheme and Staffing Standards on the Councils website; and
- DSM carry forward percentage moved from 10% to 2.5% to align with the Councils Budget Flexibility Scheme.

2.2 Revised Primary/Secondary/All-through Schools Staffing Standards

2.2.1 As part of the DSM review, it was agreed to also review and revise the current primary and secondary and all-through schools Staffing Standard.

2.2.2 The Staffing Standards were reviewed in line with similar principles such as:

- Socio-economic factors;
- Transparency and fairness; and
- Flexibility for Headteachers.

2.2.3 Short life working groups were put in place, made up of senior leadership from a wide variety of schools, Council Officers from ECS, Finance and Human Resources.

2.2.4 The revised Staffing Standards are included within the DSM scheme as Appendix 2 (Primary), Appendix 3 (Secondary) and Appendix 4 (All-through school). These will be implemented from August 2022.

2.3 Ongoing review of DSM Scheme and Guidelines

2.3.1 The Perth and Kinross DSM Scheme will be reviewed every three years in line with national requirements. The DSM scheme will also be considered on an annual basis by the Joint Negotiating Committee for Teachers (JNCT) ahead of being issued to Headteachers for any changes due to Council Budget decisions.

2.4 Proposals

2.4.1 It is intended that the revised DSM Scheme will be implemented from 1 April 2022.

2.4.2 Briefings on the new DSM Scheme will be offered to Elected Members and Headteachers as part of their Development Programme.

3. CONCLUSION AND RECOMMENDATIONS

3.1 The revised Perth and Kinross DSM Scheme has been updated to reflect the new National Framework and Guidelines and support the principles of subsidiarity and empowerment, collaboration, accountability and responsibility, and clarity and equity.

3.2 A three-year review of the DSM Scheme and associated documents will ensure that it reflects current national policy and practice.

3.3 It is recommended that the Committee:

- (i) Approves the revised Perth and Kinross DSM Scheme as shown in Appendix A; and
- (ii) Notes the three-year review of the Perth and Kinross DSM Scheme.

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Approved

Name	Designation	Date
Sheena Devlin	Executive Director (Education and Children's Services)	21 January 2022

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1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

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

1. Strategic Implications

Community Plan/Single Outcome Agreement

1.1 The proposals in this report 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 Objective No. (i) and (ii).

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 Objective No. (i) and (ii).

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 no financial implications to the Education & Children's Services Revenue Budget contained within the proposed changes to the Devolved School Management (DSM) Scheme.

Workforce

2.2 Not applicable.

Asset Management (land, property, IT)

2.3 Not applicable.

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 **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.

The proposals have been considered under the Act and no further action is required as it does not qualify as a PPS as defined by the Act and is therefore exempt.

Sustainability

3.3 Not applicable.

Legal and Governance

3.4 Education authorities are required to have a delegation scheme (known as Devolved School Management Scheme) under section 8 of the Standards in Scotland's Schools Act 2000. In terms of section 13 of the Standards in Scotland's Schools Act 2000, the education authority also requires to have regard to Scottish Government guidance issued in relation to delegation schemes. The proposals set out in this report ensure that the Council, as education authority, is complying with sections 8 and 13 of the Standards in Scotland's Schools Act 2000.

3.5 Not applicable.

Risk

3.6 Not applicable.

4. Consultation

Internal

4.1 The report was developed in collaboration with Heads of Service, Managers, Headteachers and staff across ECS. The Head of Legal and Governance Services has been consulted in the preparation of the new DSM Scheme for Perth and Kinross Council.

External

4.2 Professional Associations have been consulted in the preparation of this report.

5. Communication

5.1 The revised DSM Scheme and associated documentation will be communicated to Headteachers, Business Managers and staff associated with administration of the DSM Scheme by way of a Briefing Note following approval of the revised scheme by Lifelong Learning Committee. The revised scheme will be available on the Council's external facing website.

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 Appendix A – Devolved School management Scheme April 2022
- Appendix 1 - Early Learning and Childcare Staffing Standard
 - Appendix 2 - Primary Staffing Standard
 - Appendix 3 - Secondary Staffing Standard

- Appendix 4 - All Through Staffing Standard
- Appendix 5 - Special School Staffing Standard
- Appendix 6 - Additional Support Staffing Standard
- Appendix 7 – Devolved School Management Formula Calculations



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Devolved School Management Scheme

April 2022



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1 Introduction

Devolved School Management (DSM) was introduced nationally in 1993 to enhance and improve the management of resources at school level. The DSM guidance was reviewed in 2006, and again in 2012, taking account of the changing economic and financial climate for both Local Authorities and the Scottish Government. In June 2017 the Scottish Government consulted on changes to DSM as part of the wider *"Fair Funding to Achieve Excellence and Equity in Education"* consultation.

The updated DSM guidelines, published in summer 2019, seek to build and improve on the DSM Guidelines of 2012 and, critically, reflect and integrate with the Education Reform Programme and priorities emerging from the Scottish Government and COSLA Education Reform Joint Agreement of June 2018. These Guidelines can be found here <https://www.gov.scot/policies/schools/devolved-school-management/>

They have been prepared through collaboration and consultation with a wide range of stakeholders and will help Local Authorities review and develop their own DSM schemes with the aim of encouraging participation from stakeholders including, schools and parents. Collaboration is essential to a successful local DSM scheme and this is captured within the Joint Agreement and Headteachers' Charter to which these guidelines align and support.

The Perth and Kinross Council (PKC) DSM Scheme was originally approved in 1998, although DSM Guidelines have been updated and issued to headteachers on an annual basis. The scheme was required to be reviewed to ensure it reflects the 2019 Guidelines and this document is the result of that process.

DSM is already a key policy of Perth and Kinross Council and operates within the Council's overarching Scheme of Delegation, Financial Regulations and Standing Orders. Through this process decision-making powers and budgetary responsibilities are devolved to Headteachers to allow them to respond to local needs more effectively. DSM is intrinsically linked to the school improvement planning process and enables schools to plan for improvement and raise educational attainment.

1.1 Principles of Devolved School Management

The updated DSM principles, agreed by the Fair Funding Reference Group and building on and enhancing the foundations and principles of the 2012 guidance, are:

- Subsidiarity and Empowerment
- Collaboration
- Accountability and Responsibility: and
- Clarity and Equity



These principles reflect the National Improvement Framework aims of excellence through raising attainment and achieving equity. The principles also fully endorse those proposed in the Fair Funding consultation:

- **support excellence and equity** - ensuring every child and young person has the same opportunity to succeed
- **be fair** - placing the needs of all children and young people at the centre
- **be simple, transparent and predictable** – ensuring the costs of delivering education can be easily understood and explained and that schools are able to manage and plan ahead with certainty
- **deliver value for money** – ensuring that every penny spent is used effectively

1.2 Education Context within Perth and Kinross Council

Perth and Kinross Council is responsible for the education provision of approximately 20,200 children and young people. This is delivered through 11 secondary schools, 70 primary schools, 1 special school and a number of intensive support provisions for children and young people with additional support needs. Early Learning and Childcare is delivered through 5 Early Childhood Centres as well as 44 ELC settings within primary / special schools.

1.3 Role of Parent Council

Parental involvement is welcomed and recognised as being essential in developing a strong partnership between parents and schools. Research has shown that children do better if their parents are involved in their education. Whatever that sphere of involvement may be it is greatly appreciated and welcomed.

Parent Councils help parents and carers to become more actively and effectively involved in their children's learning. They were established under the Scottish Schools (Parental Involvement) Act 2006 in recognition of the important role that parents can play, both in their own children's learning, and in the life of a school.

The role of the Parent Council is to:

- Support the school in its work with children and young people
- Represent the views of parents and carers to Headteacher, Education Authority and Education Scotland
- Encourage links between the school, parents and carers, children and young people, pre-school groups and the wider community: and
- Report on the Council's activities to the members of the Parent Forum



Parent Councils play an important part in providing opportunities for parents to get involved in ways that suit them and to support their school in getting the best education for their children and young people. Under the Council's DSM Scheme, Headteachers will be required to update their Parent Council on their school budget throughout the school year.

2 Areas of Expenditure to be Devolved/Non-Devolved

Whilst Headteachers are given maximum flexibility over their budgets, there are areas of expenditure that are generally not considered suitable for devolution. The reasons for this may include, but are not limited to:

- areas outside the influence of a headteacher (Non-Domestic Rates)
- areas that have unacceptable levels of risk (Energy costs)

2.1 Non devolved budgets

The scheme is committed to devolving as much of the DSM budget as possible to headteachers, however in line with the updated 2019 guidelines, there are a number of expenditure areas, some of which are listed below, that are not considered suitable for devolution:

- Capital expenditure
- PPP/PFI costs
- Central support services e.g. English as an additional language support, hearing, visually impaired services, educational psychology services
- School meals
- Clothing and footwear grants
- Expenditure supported by central government specific grants, where it is explicit that the purpose is to support council wide initiatives
- Home-to-school transport
- Premature retirement costs
- Centrally funded support for children and young people who require significant additional support
- Education Maintenance Allowances: and
- Council contracted work on managing the Learning Estate where applicable



2.2 Devolved budgets

- Staff costs – teaching and support
- Staff training and review
- Per Capita (books, education materials etc)
- Outwith Per Capita (purchase of educational equipment, maintenance of equipment)
- Cleaning materials: and
- Travel and subsistence

2.3 Budget reporting

At the start of each financial year headteachers will be provided with their total school devolved budget. There will be explanatory notes which accompany the devolved budget which will assist Headteachers in understanding how their devolved budget has been calculated. To assist headteachers in managing their school devolved budget all schools have access to the Corporate Financial system with support provided by School Finance Officers.

3 Other Information on Devolved School Management

3.1 Financial Regulations

Financial Regulations are an integral part of the stewardship of Council Funds. Adhering to the Financial Regulations ensures that all financial transactions of the Council are conducted in a manner which demonstrates openness, integrity and transparency. They form a significant part of the governance of the Council.

The Perth and Kinross Council DSM Scheme will continue to provide a transparent, fair and equitable allocation of resources to schools. Allocation formulae have been designed with relative stability in mind, providing a financial envelope in advance for headteachers to effectively plan their spend for the forthcoming academic year. This will promote the efficient and effective operation of each school, and application of resources.

Local authorities must secure best value in accordance with section 1 of the Local Government Scotland Act 2003. <http://www.legislation.gov.uk/asp/2003/1/contents>

Headteachers will comply with the following regulations:

- Financial Regulations V6.0 - FINAL 07.12.18
- Procurement Regulations



3.2 Best Value Principles

The Council's DSM Scheme demonstrates best value by following the characteristics of:

- commitment and leadership;
- sound governance at a strategic and operational level;
- accountability;
- sound management of resources;
- responsiveness and consultation;
- use of review and options appraisal;
- a contribution to sustainable development; and
- equal opportunities arrangements and joint working.

Headteachers are expected to deploy the school's budget in accordance with best value principles. School expenditure should align with the School Improvement Plan supporting both Council and national priorities and frameworks. In considering the above headteachers should also take into account any relevant Scottish Negotiating Committee for Teachers (SNCT) and Joint Negotiating Committee for Teaching Staff (JNCT) agreements. Value for money is a key aspect of Best Value and all decisions regarding resource use at school level should provide this. This should be managed within the Council's procurement strategy.

3.3 Local Authority Commitment to Devolved School Management

This guidance was developed by a collaborative short life DSM Review group with representation from sector Headteachers, Business Mangers, Council Officers, Tayside Regional Improvement Collaborative and other stakeholders, to ensure the guidance works for all.

Our DSM Scheme provides a transparent, fair and equitable allocation of resources to schools. These formulae, predominantly linked to school roll, have been designed with relative stability in mind, allowing for headteachers to effectively plan spend ahead. Draft school session staffing allocations are shared with headteachers in February each year along with their roll projections.



3.4 School Expenditure Within Wider Strategic Planning

Decisions are made closest to the learner wherever possible and are delegated to headteachers and schools. Headteachers are accountable and responsible for the use of financial resources within their school following consultation with pupils, parents, staff and the wider community, and in line with their School Improvement Plan which reflects local authority strategic plans and priorities, and the National Improvement Framework. Strong and distributive leadership is necessary to establish effective systems to support partnership working with pupils, parents, staff and the wider community to determine how best to utilise resource to deliver on local and school level plans. Schools are empowered to make decisions that affect outcomes, while being part of a collaborative learning community and the Local Authority. Decisions about education spend are made in a collegiate and transparent way, paying due regard to wider responsibilities.

How Good Is Our School (HGIOS 1.05)

https://education.gov.scot/improvement/Documents/Frameworks_SelfEvaluation/FRWK2_NIHeditHGIOS/FRWK2_HGIOS4.pdf provides a national expectation of how headteachers will utilise resource to support improvement. School performance in the management of resources to promote equity will be evaluated based on the quality indicator and school leadership teams should be familiar with the expectations within the quality indicator.

The Quality Indicator has two themes:

- Management of finance for learning
- Management of resources and environment for learning

3.5 Scottish Negotiating Committee for Teachers and Local Negotiating Committees for Teachers Agreements

The DSM Scheme has been developed in consultation with Perth and Kinross Council's JNCT for Teachers and JCC for Local Government employees and is consistent with the Council's HR policies and procedures and national SNCT and local JNCT agreements.

<http://www.snct.org.uk/>



3.6 Publication availability

The DSM Scheme will be subject to 3-yearly review involving stakeholders and a peer Local Authority if appropriate and will be published following Committee Endorsement of the scheme. A summary document will be published on the Perth and Kinross Council Website with a link provided on all school websites to ensure all stakeholders can easily access the scheme.

Training

3.7 Available training

Training on the devolved arrangements contained in this scheme is essential to headteachers and school staff. This is to ensure that individuals have a clear understanding of the context of the scheme, its aims and objectives and how DSM can be used to meet the needs of staff and learners at a local level.

Training will take various forms such as DSM training sessions, induction training (financial regulations and the Council's policies and procedures relating to contracts and procurement), job shadowing, presentations at staff meetings and one to one meetings with relevant staff will also be offered where appropriate.

Consultation, Engagement and Transparency

3.8 Consultation and Engagement

At school level, as at local authority level, empowerment is fundamental to all decision making. This means that headteachers consult on appropriate matters, for example staffing, DSM, resources. It is expected this will be through Staff Consultative Committee within schools. It includes arrangements for how major financial decisions, including spending linked to Pupil Equity Fund, are compliant and meet procurement and other statutory arrangements.



3.9 Transparency

The DSM Scheme has been written in plain English in order to maximise engagement and support transparency. Full details of Perth and Kinross Council's Revenue budget is published on the Council web site at www.pkc.gov.uk. This includes details of the budget allocated to the Education and Children's Services and subsequently to education and schools.

Headteachers will also discuss the school budget and their spending proposals with their Parent Council and encourage meaningful discussion.

Collaboration

3.10 Local Priorities

The Local Priorities to be supported and addressed by schools through their application of the Devolved School Management Scheme are set out in:

- School Improvement Plans
- The Raising Attainment Strategy
- The National Improvement Framework Plan
- Education and Children's Services' Business Management Improvement Plan
- Perth and Kinross Council Corporate Plan
- Perth and Kinross Council Community Planning Partnership: and Local Outcome Improvement Plan

Local Authority decisions about education spending are expected to be made in a collegiate and transparent way, paying due regard to their wider responsibilities, including Getting it Right for Every Child (GIRFEC) and the role of Local Authorities as Corporate Parents.



Staffing

3.11 Staffing Structures

- The Early Years Staffing Standard can be found in Appendix 1.
- The Primary Staffing Standard can be found in Appendix 2*.
- The Secondary Staffing Standard can be found in Appendix 3*.
- The All Through Staffing Standard can be found in Appendix 4*.
- The Special School Staffing Standard can be found in Appendix 5.
- The Integrated Support Provision Staffing Standard can be found in Appendix 6.

*These will be implemented from the 2022/23 School Session.

3.12 Legislative and Contractual Requirements

The legislative context of the Scheme forms part of the wider framework of documentation which relates to local government and schools e.g. Financial Regulation, Standing Orders, Employment legislation and policies and procedures including SNCT and JNCT agreements. It is important that headteachers adhere to the legislation and agreements.

3.13 Staff Resource

Headteachers will be given opportunities to participate in the development and review of recruitment and staffing approaches, both for their own school/s and for the Council. For information, on all staffing matters, headteachers must adhere to the appropriate legislation and Council, SNCT and JNCT agreements and guidelines.



Professional Support

3.14 Professional Support teams, functions and transparency

In carrying out their statutory function's schools are supported and challenged by a range of professional support teams. These include:

- Education Officers
- Finance Officers
- Corporate Employee and Customer Services
- Procurement Officers
- Legal Officers
- Property and Risk Officers: and
- Facilities Management Team

Accounting

3.15 Budget underspend / overspend

Under the DSM Scheme, schools may carry forward over or under spends at the end of each financial year. The carry forward is calculated on devolved budgets as at 31 March and determined by the balances recorded in the financial ledger.

The maximum under-spend that may be carried forward is set at 2.5% of the devolved budget where the Council agrees to the funds being carried forward.

Headteachers may wish to use this carry forward to save towards a longer term planned objective such as curricular development, large scale purchase of a particular resource etc.

Any overspend is carried forward in full and no maximum threshold is applied. Headteachers are advised to avoid material overspends and to ensure that resources are managed effectively.

Planned overspends must be approved in writing by the Head of Business and Resources, prior to the expenditure being committed.



3.16 Virement

Headteachers are permitted to divert monies between delegated budgets. Such budget transfers are known as virements. The Finance Support Team will request details of such realignments and amend budgets to reflect anticipated spending.

3.17 Review, methodology and stakeholders

Any changes in financial governance made by Council will be reflected through a clearly communicated refresh of this guidance following the Council budget-setting meeting in February/March each year. A more formal and thorough evaluation and review will be undertaken on a 3-yearly basis with a key element of this formal review being a peer review with a neighbouring Local Authority.

Appendices

Appendix 1 – Early Years Staffing Standard

Appendix 2 – Primary Staffing Standard

Appendix 3 – Secondary Staffing Standard

Appendix 4 – All Through Staffing Standard

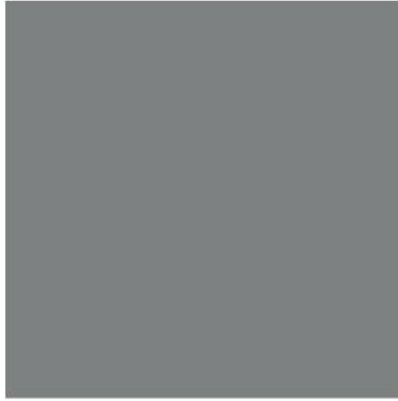
Appendix 5 – Special School Staffing Standard

Appendix 6 – Additional Support Staffing Standard

Appendix 7 – Devolved School Management Formula Calculations



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Early Learning and Childcare Staffing Standard

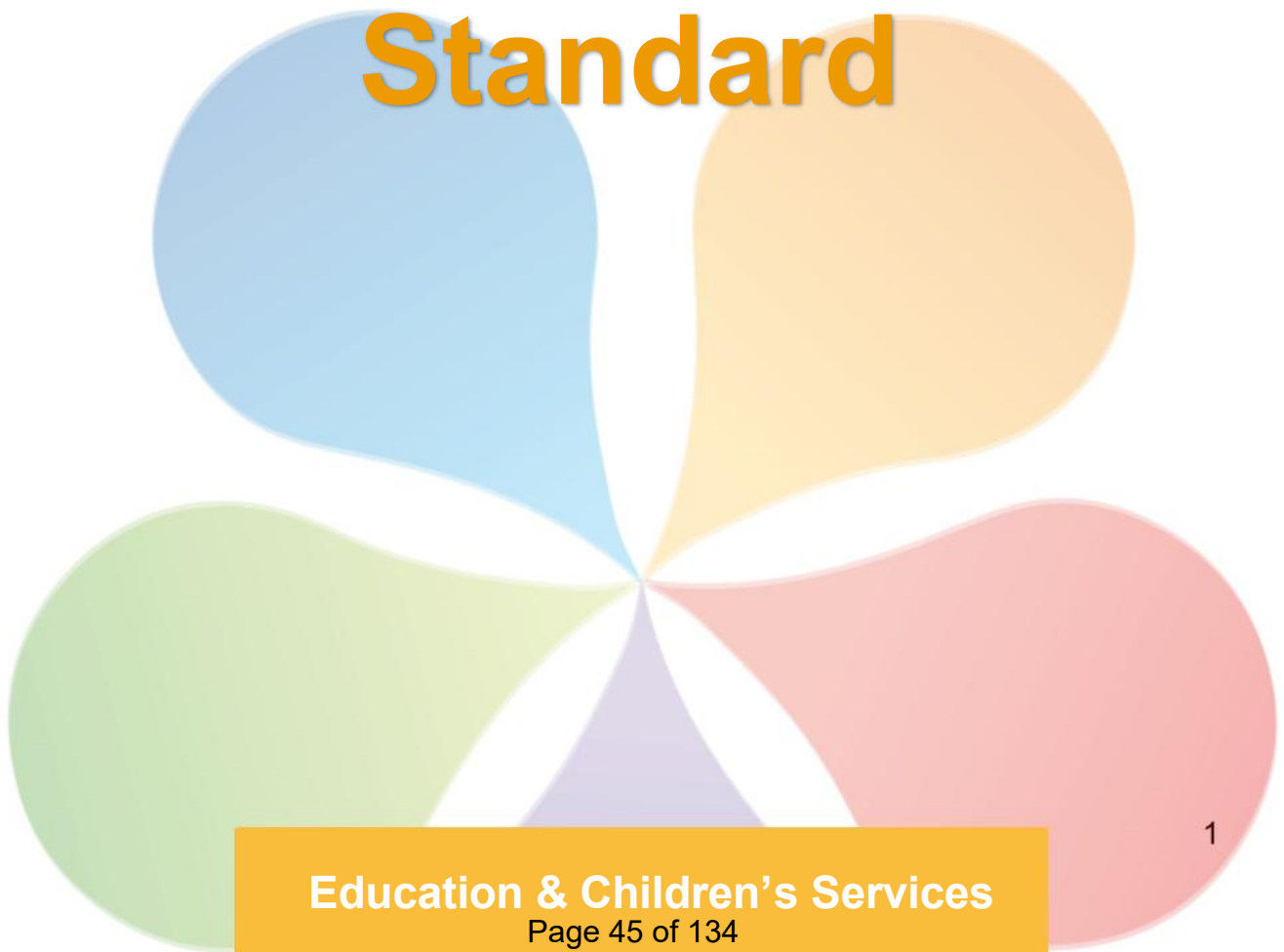
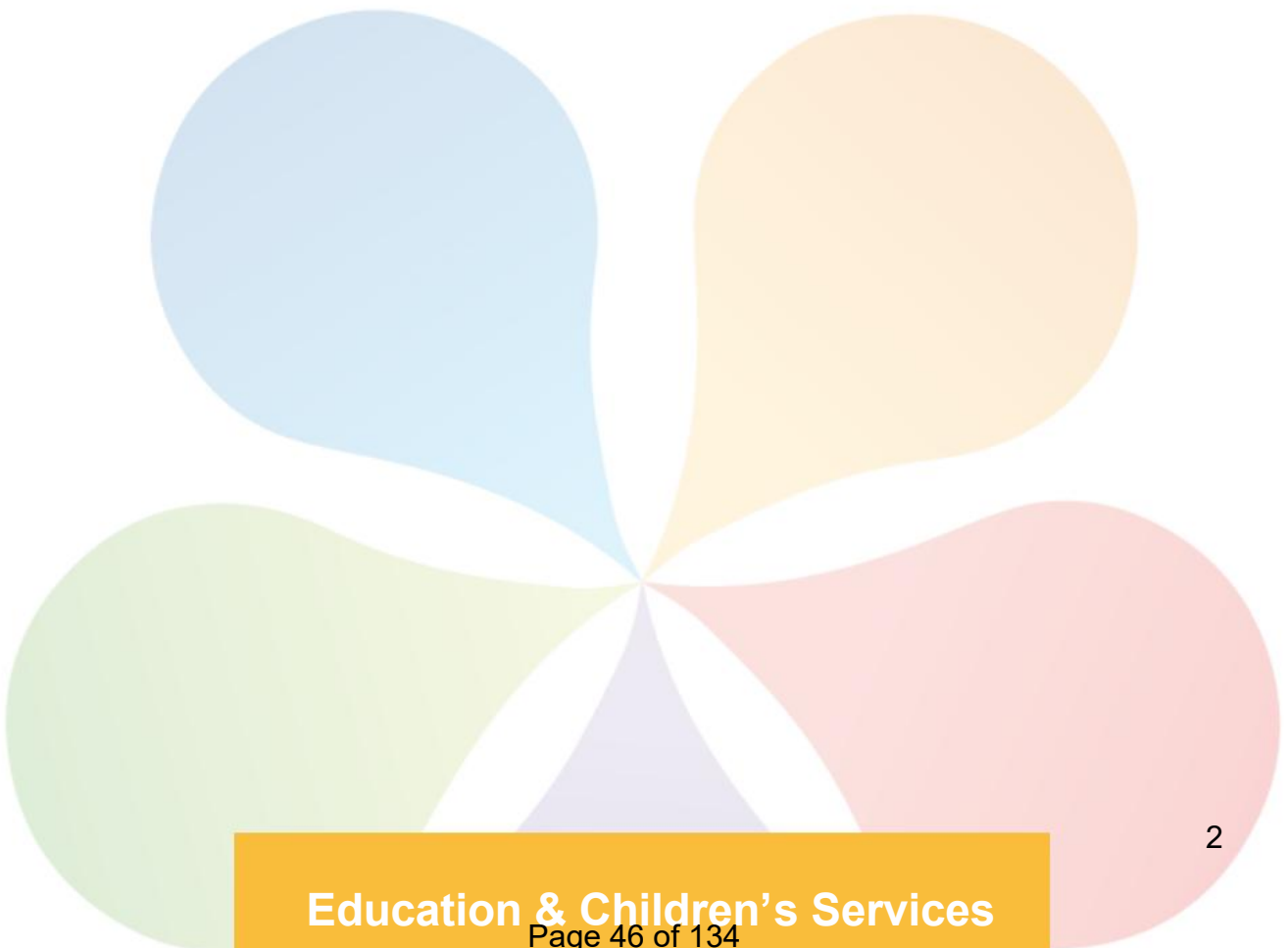




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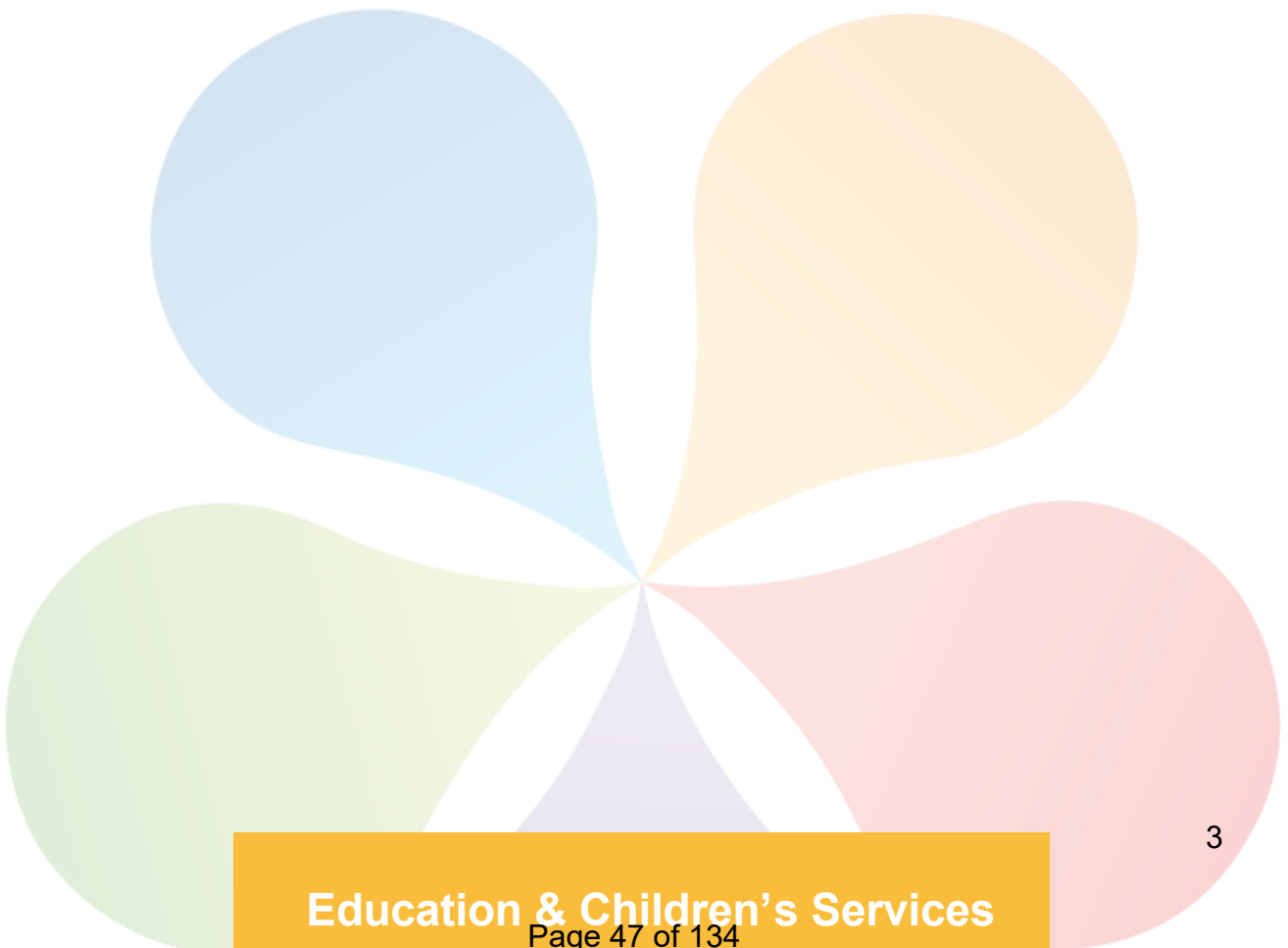
Introduction

This Early Learning and Childcare (ELC) Staffing Standard was designed to ensure equitable and fair allocation of staffing across Perth and Kinross ELC settings. This standard has taken account of the impact of the Expansion of ELC that was implemented in August 2020.

ELC Teaching Staffing Allocation

For Early Learning and Childcare settings, 0.5 fte Nursery Teacher will be allocated for capacity of 60 or above and 0.5 fte will be allocated to schools with highest number of Primary pupils entitled to Clothing and Footwear Grant within budgeted fte constraints. The allocations will be reviewed every 3 years.

This member of staff is not included in the adult to child ratios but can be used in ratio as necessary.





ELC Non Teaching Staffing

Allocation Ratios

ELC Adult to Pupil ratios are covered by Senior Early Childhood Practitioners and Early Childhood Practitioners.

	Adult to Pupil Ratios	
	Adult	Pupil
3 to 5 year olds	1	8
2 Year olds	1	5

Staffing Allocations for 3–5-year-olds in Term Time placements is a maximum of 3 x 36 hours contracts per setting. Any remaining contracts in this setting will be set at 30 hours.

Staffing allocation for 2-year-old and extended / full year placements is a maximum contract of 36 hours.

For extended day/ full year provisions, a minimum of 2 staff will be on site at all times outwith term time.

Senior Childhood Practitioner Allocations

ELC Delivery Model	Number of places	fte
Term time setting	<25	0
Term time setting	>25	1
Extended Day provision	<80	2*
Extended Day provision	>80	2
Early Learning and Childcare Centre		2

*Max allocation of 2 dependant on uptake of extended day attendance patterns.



Principal Childhood Practitioner Allocations

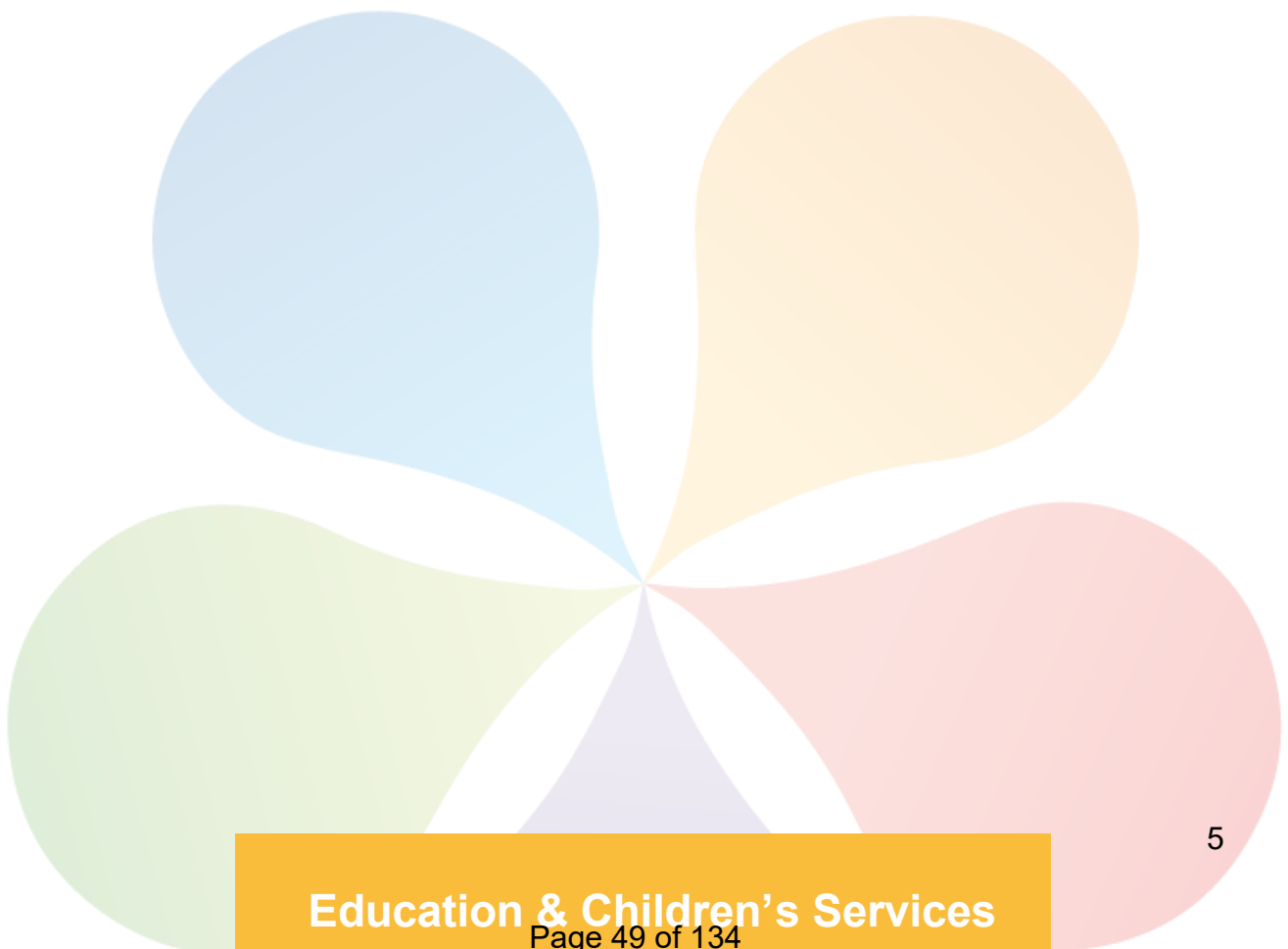
For Extended Year settings with over 80 placements, 1.00 fte Principal Early Childhood Practitioner will be allocated. This member of staff is not included in the adult to child ratios detailed above but can be used in ratio as necessary.

Early Learning and Childcare Centre Leader Allocation

For Early Learning and Childcare settings, 1.00 fte Centre Leader will be allocated. This member of staff is not included in the adult to child ratios detailed above but can be used in ratio as necessary.

Lunchtime Cover allocations

There will be an allocation of 1 x 16 hour Play Assistant for every 4 staff members required to cover staff ratios across the lunch time period.





Early Learning and Childcare Allocation Worked Example

An example of a setting with 32 x 3-5 year old term-time placements and 5 x 2 year old placements:

Ratios required	
3 to 5 Year old	4
2 Year olds	1
Total No of staff required	5

Ratios covered by	
Senior ECP	1
ECP - 36 hr contracts	3
ECP - 30 hr contracts	1
Total No of staff	5

Additional Staff	
Play Assistant (16hr)	2



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Primary Staffing Standard

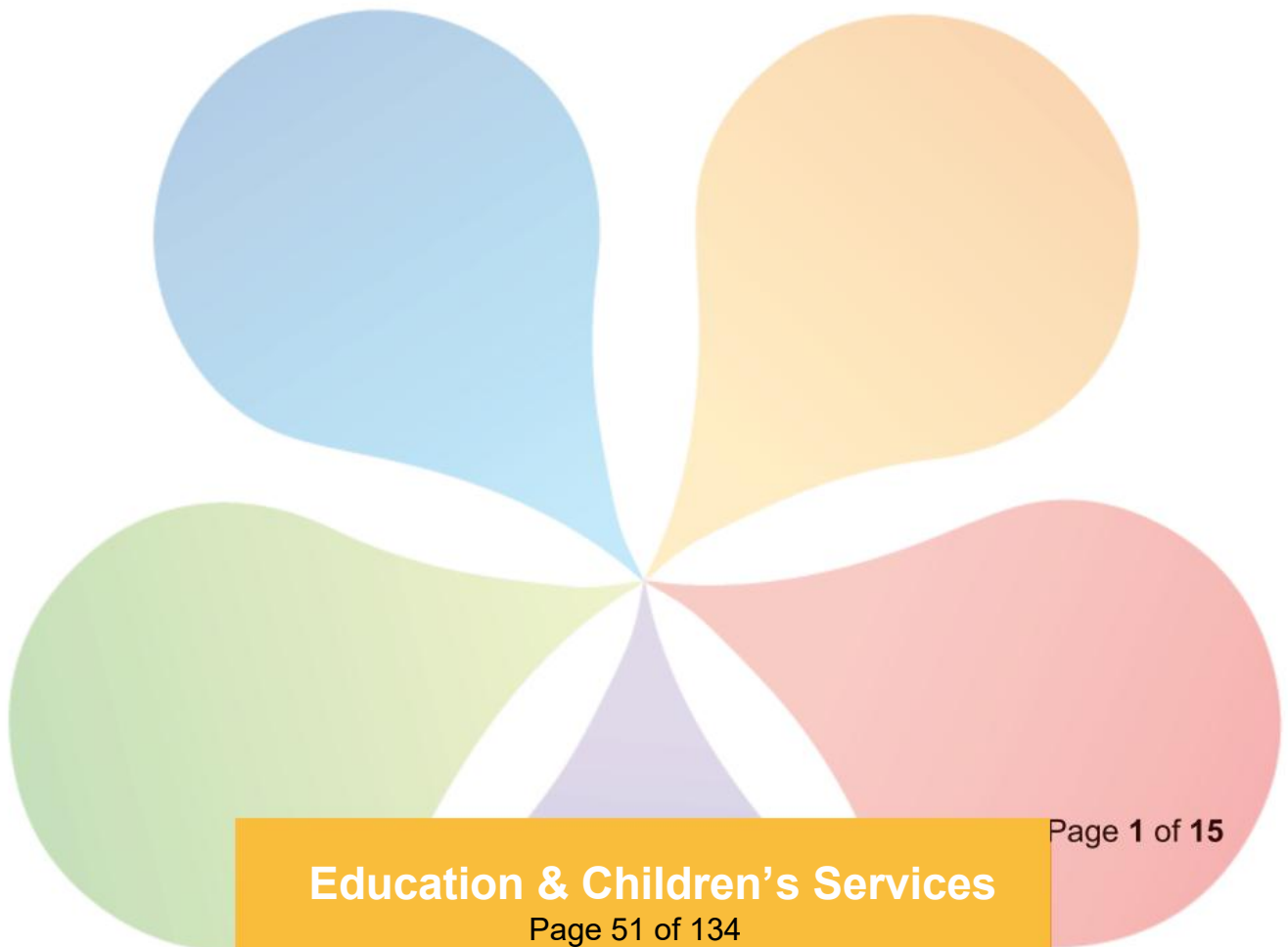




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Introduction

This Primary Staffing Standard was designed to ensure equitable and fair allocation of staffing across Perth and Kinross primary schools. This standard is applicable from session 2022/23. The allocation for social economic factors will be reviewed every three years. The staffing allocations for schools will be reviewed annually in line with the latest census figures and future projections over 3 year period. This standard is part of the Perth and Kinross Council Devolved School Management Scheme.

The Primary Staffing Standard model ensures:

- Fair, equitable and predictable allocation of teachers to schools.
- Due regard to socio-economic factors, teaching allocations are reflective of individual school circumstances.
- Management time relates directly to the number of classes, teaching FTE and size of attached ELC.
- Teaching allocations to all schools which are transparent and predictable.
- RCCT allocations are clear
- Dedicated management time is given for ELC settings.



Primary School Teaching Staffing Standard

The teaching staffing standard is built in the following way reflecting the different size and makeup of Primary schools across Perth and Kinross Council.

Number of agreed classes with Reduced Class Contact Time and baseline Management Allocations

+

Nursery Management allocation

+

Socio Economic factors allocation

+

Additional Responsibilities e.g. Intensive Support Provision, Campus Leader



Primary Promoted Structure

The composition of the primary promoted structure will be based on total school roll (Nursery and Primary) except where the nursery is classed as an Early Learning and Childcare Centres (ELCC). Promoted structure for schools with an ELCC will be determined by Primary roll only. A separate management allocation of 1 FTE Centre Leader will be allocated to the ELCC.

Primary & Nursery Roll (Except ELCC)	Headteacher	Depute Headteacher	Principal Teacher
Roll Under 50	1	-	-
Roll 50-190	1	-	1
Roll 191-300	1	1	-
Roll 301-500	1	2	-
Roll 501 onwards	1	3	-

The table allocation is fixed and cannot be varied. The roles of Headteacher, Depute Headteacher (DHT) and Principal Teacher (PT) are set out in in [Part 2 Section 2 of the SNCT Handbook](#). As per section 2.13, where a class teaching commitment is included in the remit of a headteacher or depute headteacher, its extent will be determined by the council on the basis of an assessment of the management content of the post.



Number of agreed classes with Reduced Class Contact Time (RCCT) and baseline Management Allocation

The number of classes will be based on an optimised class configuration to ensure efficient allocation of class teachers. Any differentiation from this will be in exceptional circumstances through early discussions with the Service Manager (Primary), e.g. relating to significant changes in the school estate, school roll or staffing. Final allocations will be agreed at the annual staffing exercise. RCCT will be added for each class teacher as part of this baseline.

Management time will be allocated based on the number of classes agreed with FTE for each additional class.

Agreed Number of classes	Class Teacher with RCCT FTE	Management Time FTE	Total FTE
1	1.11	0.3	1.41
2	2.22	0.45	2.67
3	3.33	0.6	3.93
4	4.44	0.75	5.19
5	5.56	0.9	6.46
6	6.67	1.05	7.72
7	7.78	1.2	8.98
8	8.89	1.35	10.24
9	10.00	1.5	11.50
10	11.11	1.65	12.76
11	12.22	1.8	14.02
12	13.33	1.95	15.28
13	14.44	2.1	16.54
14	15.56	2.2	17.76
15	16.67	2.3	18.97
16	17.78	2.4	20.18
17	18.89	2.5	21.39
18	20.00	2.6	22.60



Nursery Management Allocation

Management time will be allocated based on the number of nursery places offered as at April each academic year. This is in addition to the baseline per class management allocation.

	Nursery Setting	Management allocation FTE
	ELCC	0.05
Places offered as at April	>100	0.50
	60 - 99	0.40
	40 - 59	0.30
	25 - 39	0.20
	9 - 24	0.15
	8	0.10



Socio Economic Factors

Additional FTE allocations are based on a % of clothing and footwear grant (CFG) registration as a proportion of primary population over the previous 3 academic years. The allocation will be calculated every 3 academic years and remain in place for 3 years. Adjustments may be required within that period based on affordability. The threshold for application of socio-economic factors will be 10% of Primary school population.

Average CFG registration as proportion of total primary population over previous 3 academic years	>10%	No of CFG pupils X 0.00375 FTE*
	>20%	No of CFG pupils X 0.0075 FTE*

*allocation is rounded 2 decimal places. Formula is subject to change based on affordability

Additional Responsibilities

Management allocation	
Intensive Support Provision	0.05 FTE
Campus Leader	0.05 FTE

Staffing and management of Intensive Support Provisions are allocated separately. Principal Teachers of Intensive Support Provisions are not covered by the standard.



Worked Examples

Example 1: Primary school with primary roll of 370, 72 place Nursery (not ELCC) and Intensive Support Provision. Clothing and Footwear Grant registration average over previous 3 years is 50.

Agreed number of primary classes is 15.

Promoted Structure based on Primary + Nursery total roll of 442

1 Headteacher

2 Depute Headteachers

Teaching allocations

		FTE
Class teacher	15 classes	16.67
Management allocation		2.30
Nursery allocation	72 places	0.40
Socio Economic factors*	see below	0.19
Intensive Support Provision	Yes	0.05
Total FTE		19.61

Socio Economic Allocation calculation*

Primary roll	370
CFG	50
CFG as proportion of Primary Roll	13.51%
Formula	=no of CFG reg X 0.00375 FTE
Allocation FTE rounded to 2 decimal places	0.19



Example 2: Primary school with primary roll of 255 and 48 place Nursery (ELCC). Clothing and Footwear Grant registration average over previous 3 years is 60.

Agreed number of primary classes is 10.

Promoted Structure based on Primary roll of 255 (48 nursery roll not included as it's an ELCC)

1 Headteacher

1 Depute Headteacher

		FTE
Class teacher	10 classes	12.76
Management allocation		1.65
Nursery allocation	ELCC	0.05
Socio Economic factors*	see below	0.45
Intensive Support Provision	No	0.00
Total FTE		14.91

Socio Economic Allocation calculation*

Primary roll	255
CFG	60
CFG as proportion of Primary Roll	23.5%
Formula	=no of CFG reg X 0.0075 FTE
Allocation FTE rounded to 2 decimal places	0.45



Shared Headship

Headteachers that manage 2 primary schools are allocated 0.5 FTE management time per school.

A Principal teacher will be allocated between the 2 schools. Non class contact management time allocation will be based on combined roll of both schools.

Combined Roll	PT MGT	FTE*
50-80	3.5 hrs	0.14
81-130	4.5 hrs	0.18

* RCCT is included in class allocation

Class teachers will be allocated based on number of classes + RCCT.



Other Considerations

Flexibility

Within the structure, Headteachers have the flexibility to adjust the dedicated management time of their promoted staff, within discretion.

Principal Teacher management time should be a minimum of:

Roll	PT Management Time
50-80	3.5 hours
81-130	4.5 hours
131-190	5.25 hours

Depute Headteachers should have dedicated management time. It is recommended that this should be a minimum of 0.3 FTE.

The Headteacher can decide how to distribute teaching allocation and management time between the members of the Senior Leadership Team, within the recommended minimums. For example, a school with 2 DHTs and 1.0 FTE management time could choose to split this as 0.5 FTE management time for each DHT or 0.3 FTE for one DHT and 0.7 FTE DHT for the other. This will be agreed in negotiation with the staff concerned and based on the needs of the school.

Where schools qualify for additional management time which exceeds their management allocation, consideration can be given to creating additional management posts within the staffing budgeted costs. All additional management time is costed on main grade scale. Discussions must take place with central staff (Service Manager / Quality Improvement Officer / Human Resources / Finance) as part of any considerations before final decisions can be made.

Potential options include:

1. Providing development opportunities for staff on the main grade teacher scale relating to management tasks (e.g. undertake aspects of development work, lead an area of self-evaluation, lead a curricular area).
2. Convert time to part time PT role for a fixed term period to undertake a specific project or tasks to support the school.



Probationer Teachers

All schools must consider taking a probationer teacher each year and as part of the staffing exercise any vacancies should be reviewed and if required to be recruited as fixed term in the interim.

As a guide, those schools with over 8 classes should take at least 1.00 FTE every year.

Schools with probationers filling a 1 FTE vacancy will require 0.2 FTE to cover for the probationer central days and 0.1 FTE to release a mentor to support them.



Primary School Single Status Staffing Standard

The Primary Staffing Standard for Single Status Staff is shown below:

Primary School Support Assistants

Primary School Support Assistant is a GE2 term time role. School rolls include number of nursery places offered as at April each academic year.

School Roll up to 109 pupils

School Roll	Total Hours
0-19	15.00
20-49	25.00
50-109	35.00

School Roll 110 pupils and above

School Roll	Total Hours
110-139	57.50
140-169	60.00
170-199	65.00
200-299	67.50
300-399	75.50
400-499	79.50
500+	82.00

Additional Lunchtime Supervision allocation

School Roll	Total Hours
Up to 100	6
100 to 200	12
Over 200	18



Primary School Support Workers

Primary School Support Worker is a GE3 term time role. Allocations below are classroom based and calculated on Primary pupil rolls only. Maximum contracted hours are 27.5hrs.

School Roll	Total Hours
0-39	15.00
40-249	27.50
250+	55.00



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Secondary Staffing Standard



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Introduction

This Secondary Teaching Staffing Standard was designed to ensure equitable and fair allocation of staffing across Perth and Kinross secondary schools. This standard is applicable from session 2022/23 and will in place for 3 years. It will be reviewed in year 3 with any changes implemented the following year and will be continued to be reviewed in a three-year cycle. This standard is part of the Perth and Kinross Council Devolved School Management Scheme.

The Secondary Staffing Standard model ensures:

- fair, equitable and predictable allocation of teachers to schools.
- due regard to socio-economic factors, a legal requirement of the Education (Scotland) Act 2016.
- teaching allocations are reflective of individual school circumstances.
- teaching allocations to all schools which are transparent and predictable.
- Support for Learning staffing is allocated consistently across Perth and Kinross Council

Secondary School Teaching Staffing Standard

The teaching staffing standard is built in the following way reflecting the different size and makeup of Secondary schools across Perth and Kinross Council.

11 Baseline Staff per school plus Business Manager

+

FTE Multiplier per pupil

+

Socio Economic Allocation based on Clothing Grant Uptake



Secondary FTE Staffing Formula

The fte staffing formula will be based on a tiered multiplier based on pupil roll. Pupil roll will be based on projected pupil roll as agreed at loading and capacity meetings. After the September Census, allocations will be adjusted for movement in excess of 5 pupils from agreed numbers.

Secondary Roll	Base fte	Multiplier	Fte Formula
4 year	11	0.054	11 + no of pupils x 0.054
300 – 599	11	0.0615	11 + no of pupils x 0.0615
600 – 1199	11	0.061	11 + no of pupils x 0.061
1200+	11	0.060	11 + no of pupils x 0.060

Highland Perthshire Learning Partnership Adjustment

An additional 0.006FTE will be allocated for S5 & S6 pupils at Breadalbane. This will reflect the HPLP Senior Phase curriculum.

Socio Economic Factors

Additional fte allocations are based on a % of clothing and footwear grant (CFG) registration as a proportion of primary feeder population over the previous 3 academic years. The allocation will be calculated every 3 academic years and remain in place for 3 years. Adjustments may be required within that period based on affordability. The threshold for application of socio-economic factors will be 10% of primary feeder school population.

Average CFG registration as proportion of total primary feeder population over previous 3 academic years	>10%	No of CFG pupils X 0.00375fte*
	>20%	No of CFG pupils X 0.0075fte*

*Allocation is rounded 2 decimal places. Formula is subject to change based on affordability



Senior Management Team Structure

Pupil roll	Headteacher	Depute Headteacher	Business Manager
0-399	1	1	1
400-699	1	2	1
700-1,199	1	3	1
over 1,200	1	4	1

The Headteacher and Depute Headteacher posts are allocated as 1 fte per post against the allocated secondary teaching fte.

Resourcing Support for Learning

Each secondary school must allocate a minimum level (4% of staffing) to Support for Learning from their DSM staffing allocation.

Reserved Places

Reserved places will continue to not be used for fte calculations. It will be ensured, however, that reserved places do not take a school over a practical banding in S1 and S2 dependent on subject choice model. If this is unavoidable an appropriate FTE adjustment will be made.



Worked Example

Secondary school with secondary roll of 645. Clothing and Footwear Grant registration for primary feeder average over previous 3 years is 13.56%.

Teaching allocations

	FTE
Baseline	11
FTE Multiplier @ 0.061	39.35
Socio Economic factors (see below)	0.31
Total FTE	50.66
<i>Anticipated DSM SFL minimum staffing fte</i>	<i>2.03</i>

Socio Economic Allocation calculation

Primary feeder roll	612
CFG	83
CFG as a proportion of Primary Feeder Roll	13.56%
Formula	= no of CFG reg X 0.00375fte
Allocation FTE rounded to 2 decimal places	0.31



Secondary School Single Status Staffing Standard

The Secondary Staffing Standard for Single Status staff is shown below:

Business Manager

Each secondary school will have 1.00 fte Business Manager that is contracted full year. This post is included in the senior management team of the school.

Admin/Clerical Support

Total Hours allocated

School Roll	Total Hours
0-300	57
301-400	80.75
401-500	105
501-650	128
651-800	152.25
801-950	177.25
951-1100	203.50
1101-1250	228.50
1251-1400	252.75
1401-1550	277.75
Additional Campus Allocation	93.20

Hours allocated above include:

	Campus	Non-Campus
36 hrs Full year	Campus Admin Officer TAS6	Admin Assistant TAS5
Remaining hrs	GE3 Full Year	GE2 Term Time + 2 weeks



Auxiliary Term time GE2

School Roll	Current Allocation of Hours
100-599	25
600 - 1099	28.75
1100 +	30

Technicians – Full Year

School Roll	Current Allocation of Hours
0-90	0
100-599	1
600-1099	2
1110-1499	3
1500+	4

General Assistants – Term time GE2

School Roll	Current Allocation of Hours
0-90	0.5
100-599	0.5
600-1099	1.0
1110-1499	1.5
1500+	2.0

Single Status Staffing Saving

At the Special Meeting of the Council on 13th February 2014 a saving was approved to review and redesign of School Support Staff in-line with modern ways of working. Secondary School Budget Holders can determine the most appropriate method of delivering this saving for their individual school.

Flexibility

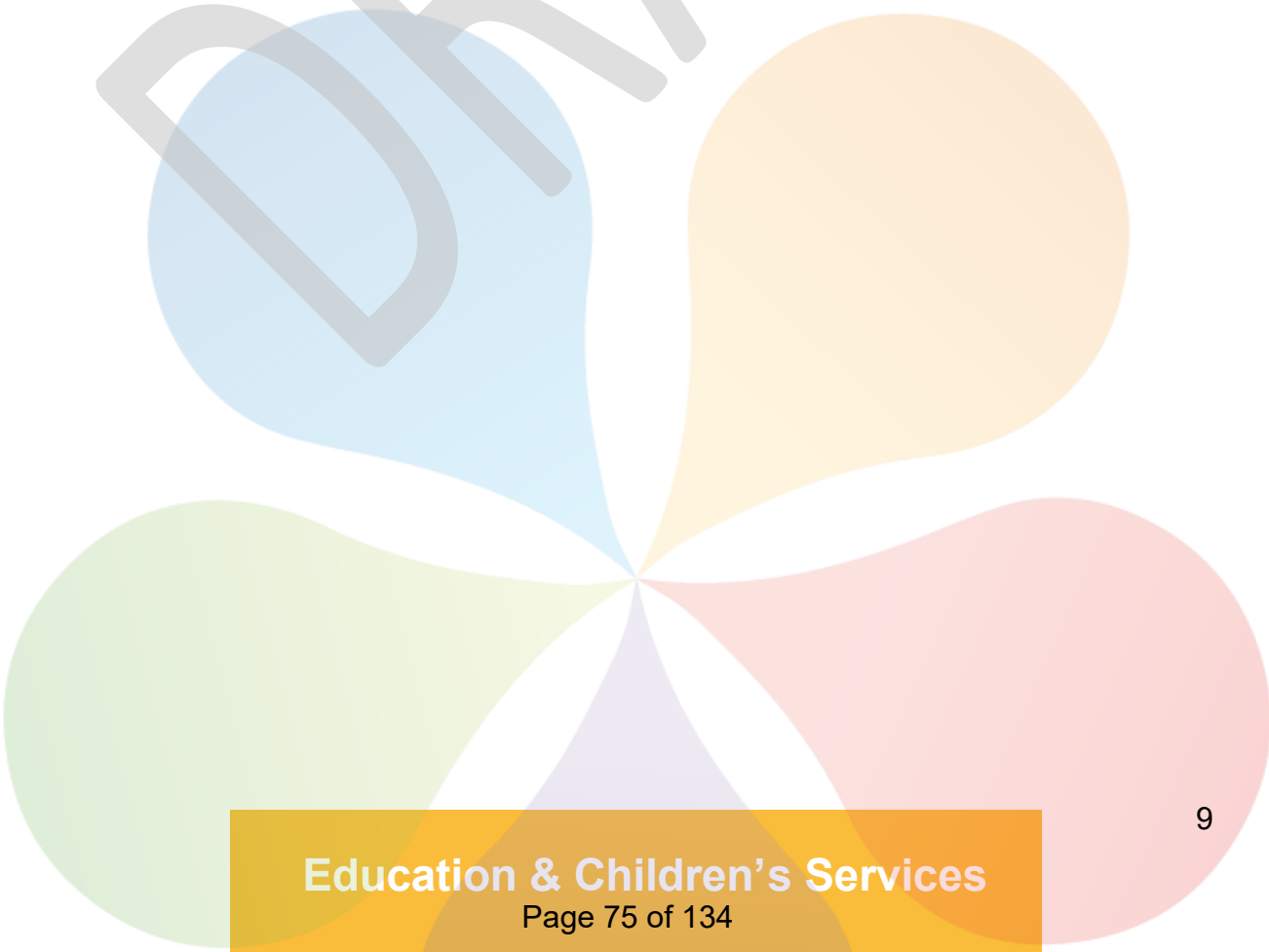
Budget Holders have the capacity to restructure non teaching hours within the financial envelope of the staffing standard.



Staffing Budgets Slippage Targets

All schools are allocated a slippage target that requires to be managed as part of the overall devolved school management budget.

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All Through Staffing Standard

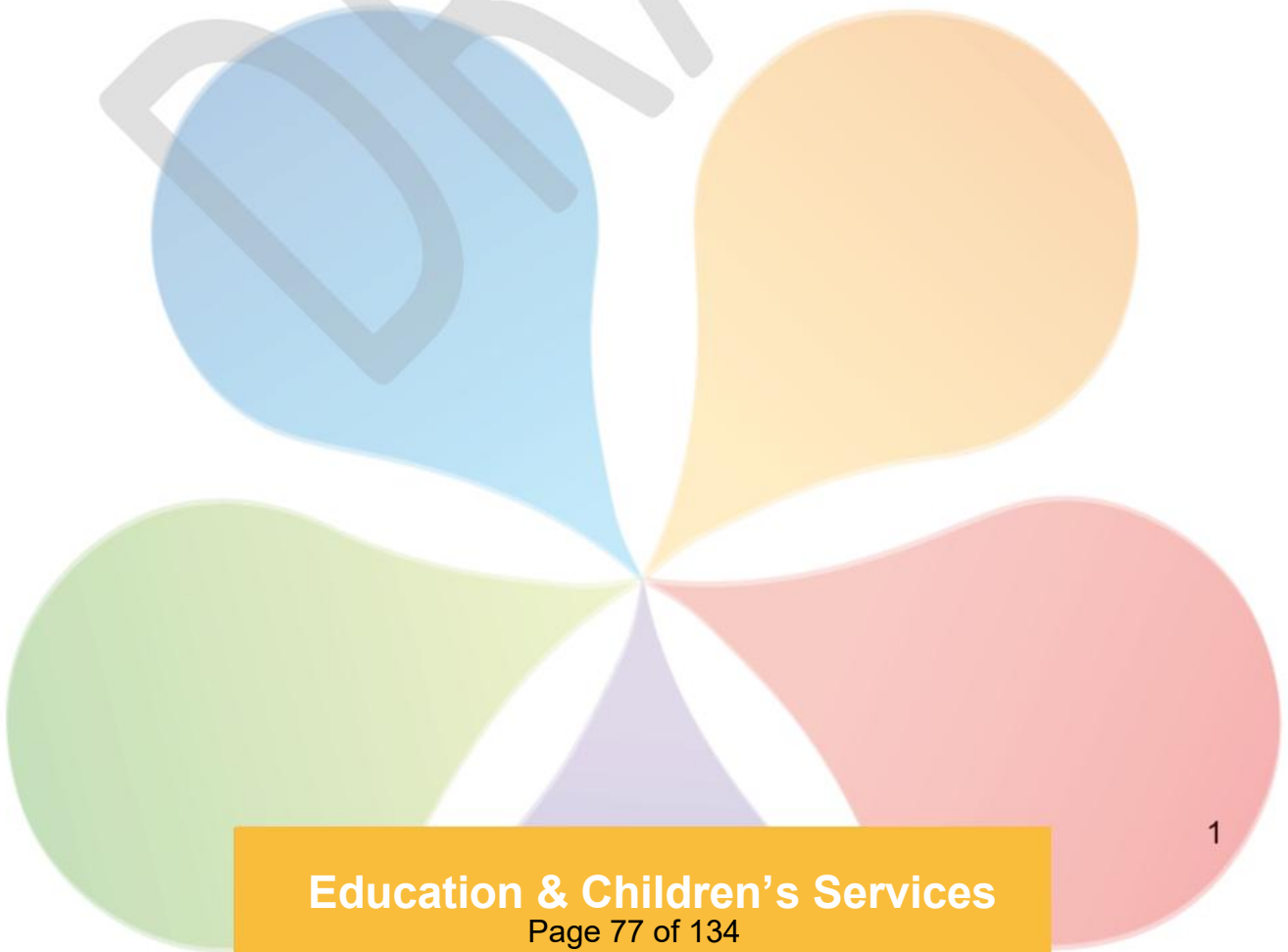




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Introduction

This All Through Staffing Standard was designed to ensure equitable and fair allocation of staffing across Perth and Kinross primary schools. This standard is applicable from session 2022/23. The allocation for social economic factors will be reviewed every three years. The staffing allocations for schools will be reviewed annually in line with the latest census figures and future projections over 3 year period. This standard is part of the Perth and Kinross Council Devolved School Management Scheme.

The All Through Staffing Standard model ensures:

- fair, equitable and predictable allocation of teachers to schools.
- due regard to socio-economic factors,
- teaching allocations to all schools which are transparent and predictable,
- teaching allocations are reflective of individual school circumstances,
- Support for Learning staffing is allocated consistently across Perth and Kinross Council.

All Through Staffing Standard

Staffing Standard formulas for All Through Schools will be based on the Primary and Secondary Staffing Standard models as follows.

All Through Staffing Standard – Primary Sector

The teaching staffing standard for the primary sector of all through schools is built in the following way reflecting the different size and makeup of Primary schools across Perth and Kinross Council.

Number of agreed primary classes with RCCT and baseline Management Allocation

+

Nursery Management allocation

+

Socio Economic factors

+

Additional Responsibilities e.g. ISP

All Through Primary Sector Promoted Posts

The composition of the primary promoted structure will be based on total school roll (Nursery and Primary)

Primary & Nursery Roll (Except ELCC)	Depute Headteacher	Principal Teacher
Roll Under 50	-	-
Roll 50-190	-	1
Roll 191-300	1	-
Roll 301-500	2	-
Roll 501 onwards	3	-

The Headteacher will work as an All Through Headteacher and their FTE will be included in the Secondary Sector FTE Allocation.

Where schools qualify for additional primary management time which exceeds their primary management allocation, consideration can be given to creating additional management posts within the staffing budgeted costs. All additional management time is costed on main grade scale. Discussions must take place with central staff (Service Manager / QIO / HR / Finance) as part of any considerations before final decisions can be made.

Potential options include:

1. Providing development opportunities for staff on the main grade teacher scale relating to management tasks (e.g., undertake aspects of development work, lead an area of self-evaluation, lead a curricular area).
2. Convert time to part time PT role for a fixed term period to undertake a specific project or tasks to support the school.

Number of agreed primary classes with RCCT and baseline Management Allocation

The number of primary classes will be based on an optimised class configuration to ensure efficient allocation of class teachers. Any differentiation from this will be in exceptional circumstances through early discussions with the Service Manager (Primary), e.g., relating to significant changes in the school estate, school roll or staffing. Final allocations will be agreed at the annual staffing exercise. RCCT will be added for each class teacher as part of this baseline.

Management time will be allocated based on the number of classes agreed with fte for each additional class.

Agreed Number of classes	Class Teacher with RCCT FTE	Management Time FTE	Total FTE
1	1.11	0.3	1.41
2	2.22	0.45	2.67
3	3.33	0.6	3.93
4	4.44	0.75	5.19
5	5.56	0.9	6.46
6	6.67	1.05	7.72
7	7.78	1.2	8.98
8	8.89	1.35	10.24
9	10.00	1.5	11.50
10	11.11	1.65	12.76
11	12.22	1.8	14.02
12	13.33	1.95	15.28
13	14.44	2.1	16.54
14	15.56	2.2	17.76
15	16.67	2.3	18.97
16	17.78	2.4	20.18
17	18.89	2.5	21.39
18	20.00	2.6	22.60

Nursery Management Allocation

Management time will be allocated based on the number of nursery places offered as at April each academic year. This is in addition to the baseline per class management allocation.

	Nursery Setting	Management allocation FTE
Places offered as at April	ELCC	0.05
	>100	0.50
	60 - 99	0.40
	40 - 59	0.30
	25 - 39	0.20
	9 - 24	0.15
	8	0.10

Socio Economic Factors – Primary Sector

Additional fte allocations are based on a % of clothing and footwear grant (CFG) registration as a proportion of primary population over the previous 3 academic years. The allocation will be calculated every 3 academic years and remain in place for 3 years. Adjustments may be required within that period based on affordability. The threshold for application of socio-economic factors will be 10% of Primary school population.

Average CFG registration as proportion of total primary population over previous 3 academic years	>10%	No of CFG pupils X 0.00375fte*
	>20%	No of CFG pupils X 0.0075fte*

*allocation is rounded 2 decimal places. Formula is subject to change based on affordability

Additional Responsibilities

Management allocation	
Intensive Support Provision	0.05fte

Staffing and management of Intensive Support Provisions are allocated separately. Principal Teachers of Intensive Support Provisions are not covered by the standard.

All Through Staffing Standard – Secondary Sector

The All Through teaching staffing standard for the Secondary Sector is built in the following way reflecting the different size and makeup of Secondary schools across Perth and Kinross Council.

11 Baseline Staff per school plus Business Manager

+

FTE Multiplier per pupil

+

Socio Economic Allocation based on Clothing Grant Uptake

Secondary FTE Staffing Formula

The fte staffing formula for the secondary sector will be based on a tiered multiplier based on pupil roll. The Business Manager post is in addition to the 11 fte Baseline. Pupil roll will be based on projected pupil roll, however this will be corrected for after the September Census return is finalised.

Secondary Roll	Base fte	Multiplier	Fte Formula
4 year	11	0.054	11 + no of pupils x 0.054
300 – 599	11	0.0615	11 + no of pupils x 0.0615
600 – 1199	11	0.061	11 + no of pupils x 0.061
1200+	11	0.060	11 + no of pupils x 0.060

Highland Perthshire Learning Partnership Adjustment

An additional 0.006FTE will be allocated for S5 & S6 pupils at Breadalbane. This will reflect the HPLP Senior Phase curriculum.

Socio Economic Factors – Secondary Sector

Additional fte allocations are based on a % of clothing and footwear grant (CFG) registration as a proportion of primary feeder population over the previous 3 academic years. The allocation will be calculated every 3 academic years and remain in place for 3 years. Adjustments may be required within that period based on affordability. The threshold for application of socio-economic factors will be 10% of primary feeder school population.

Average CFG registration as proportion of total primary feeder population over previous 3 academic years	>10%	No of CFG pupils X 0.00375fte*
	>20%	No of CFG pupils X 0.0075fte*

*allocation is rounded 2 decimal places. Formula is subject to change based on affordability

Resourcing Support for Learning

Each secondary school, including the secondary sector of all through schools, must allocate a minimum level (4% of staffing) to Support for Learning from their DSM staffing allocation.

Reserved Places

Reserved places will continue to not be used for fte calculations. It will be ensured, however, that reserved places do not take a school over a practical banding in S1 and S2 dependent on subject choice model. If this is unavoidable an appropriate FTE adjustment will be made.

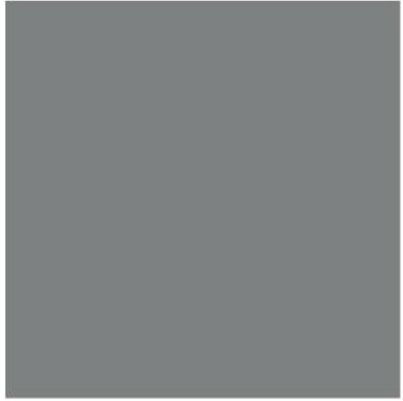
All Through Promoted Staff Remits

Sector specific operational management will continue. There will be opportunities for all through DHTs to take on cross sector strategic leadership roles e.g., equalities, child protection. This will be reflected in job profiles.

Job sizing will be required for all management staff if one role changes. Schools may be required to hand in management remits for info/oversight. Strategic remits must not affect the overall job sizing.



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Special School Staffing Standard

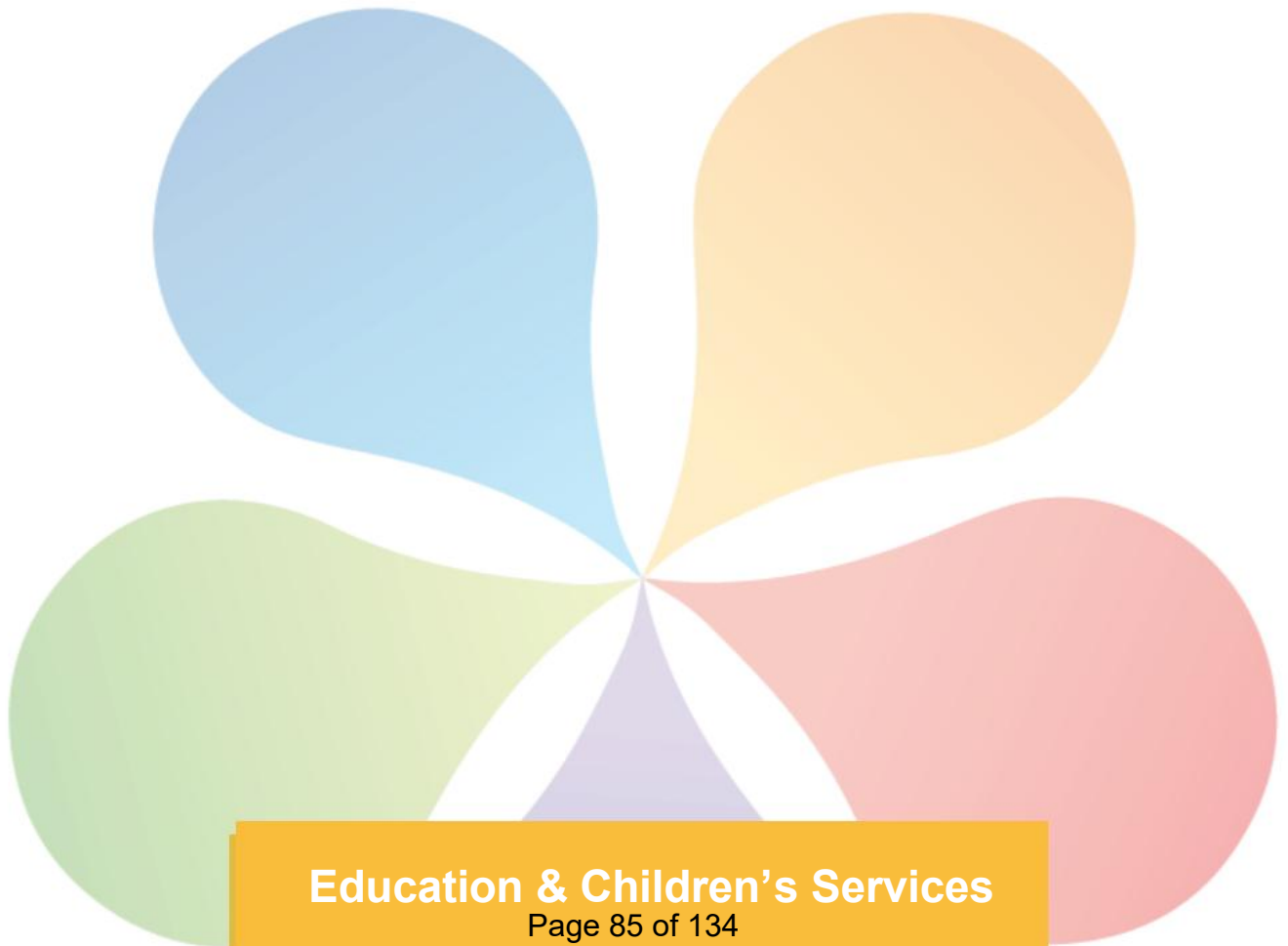




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Introduction

This Special School Staffing Standard was designed to ensure equitable and fair allocation of staffing for Perth and Kinross's special school. This standard is applicable from session 2022/23 and will in place for 3 years. It will be reviewed in year 3 with any changes implemented the following year and will be continued to be reviewed in a three-year cycle. This standard is part of the Perth and Kinross Council Devolved School Management Scheme.

Special School Teaching Staffing Standard

The total teaching FTE will be determined by the number of classes in the school. RCCT time will be added for each class teacher as part of the overall allocation. RCCT time will be adjusted for any classes covered by a promoted post.

	FTE per class including RCCT
Primary	1.11
Transition	1.22
Secondary	1.22
RCCT adj for classes covered by Promoted posts	-0.13

Special School Promoted Post Structure with Management Time

The composition of the special school promoted post structure will be based as below. Not all promoted posts will be fully non-class committed.

	FTE	Mgt time fte
Headteacher	1	1
Depute Headteacher	1	0.8
Principal Teacher	2	0.4

Special School Single Status Staffing Standard

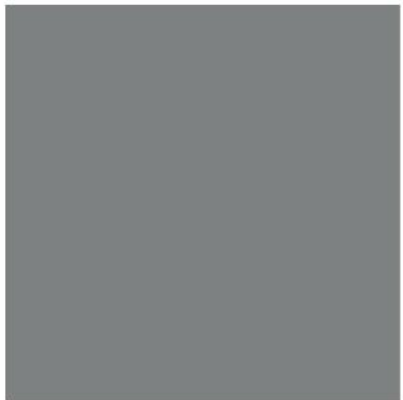
	Grade	Total Hrs	
Social Care Officer	TAS 7	57	
Lead Pupil Support Assistant	TAS 5	72	36 hrs class committed to be part of Primary / Secondary allocation below
Primary Pupil Support Assistant per class	TAS4	88.5	Standard contract 28.5hrs but some post be extended to max contract 30 hrs
Secondary Pupil Support Assistant per class	TAS4	90	Max contract 30.75 hrs
Primary School Support Worker - Office based	GE3	60	
Primary School Support Assistant- Lunch cover	GE2	15	

Special School Early Learning and Childcare Staffing Standard

	Grade	Total Hrs	
Early Years Practitioner	TAS5	36	
Pupil Support Assistants	TAS4	60	Max contract 30 hrs
Play Assistant	GE2	16	



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Additional Support Staffing Standard

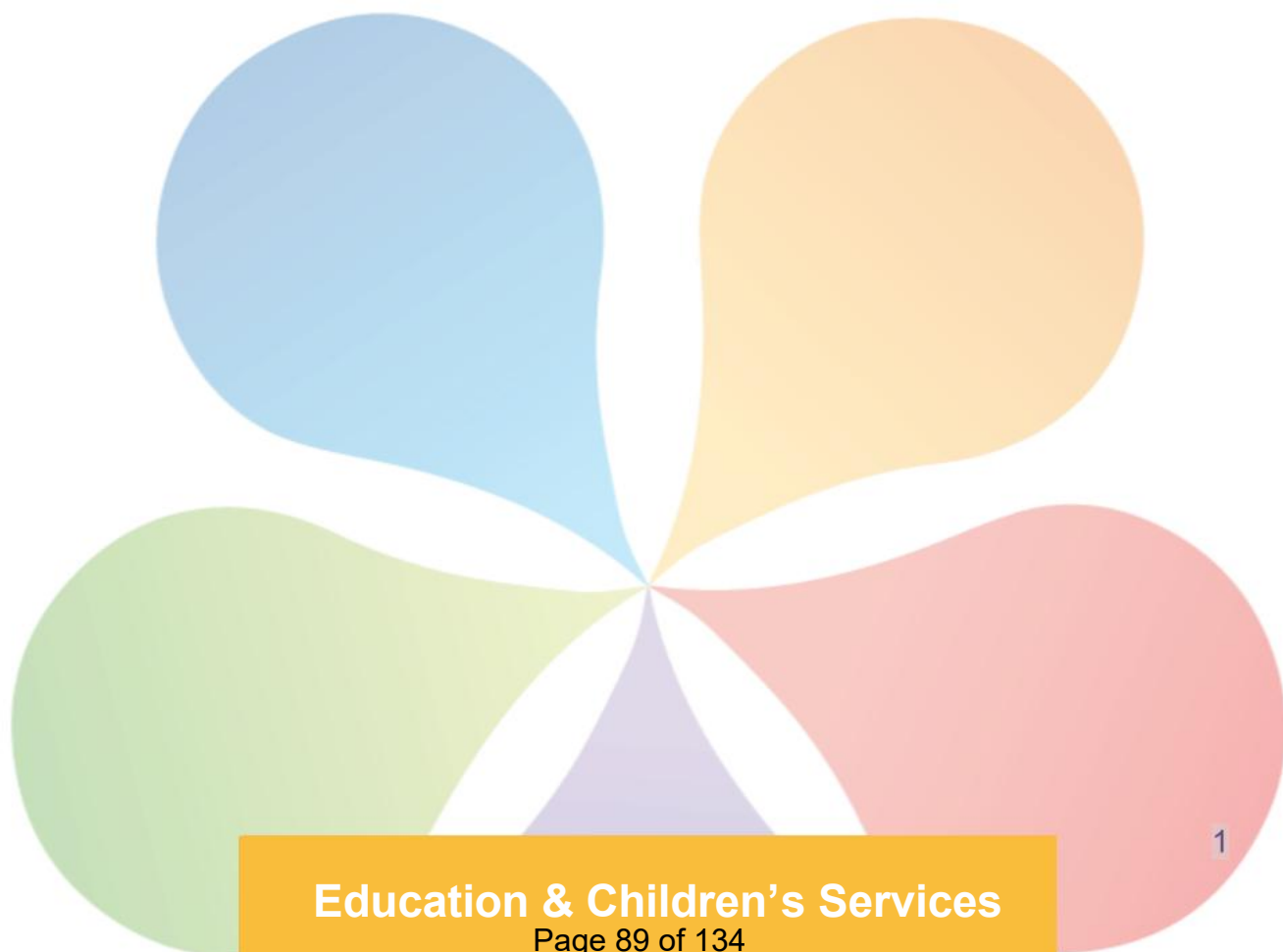
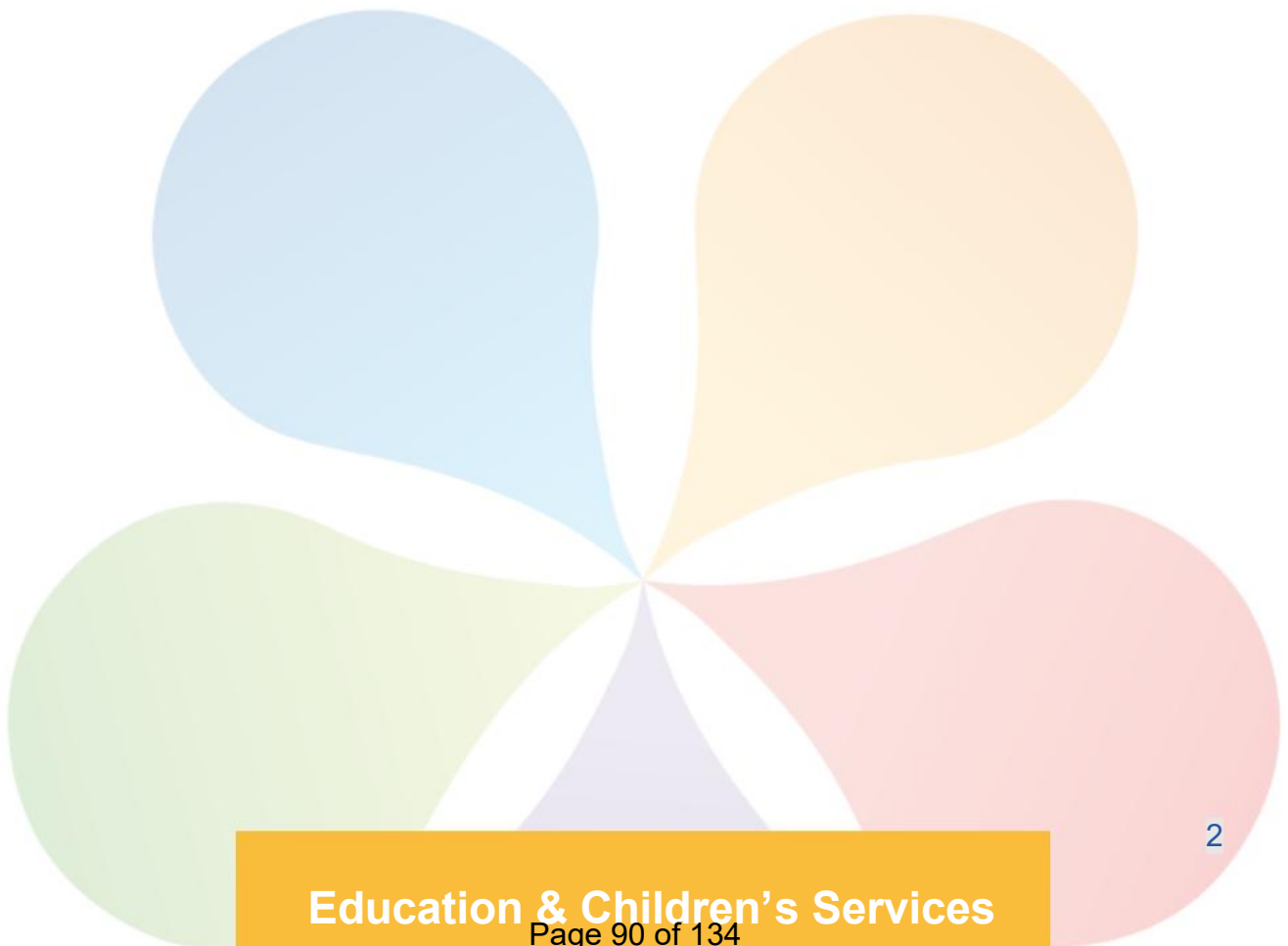




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Additional Support Needs – Enhanced Allocation

Primary Support for Learning Teaching

Primary Support for Learning teachers are funded centrally and are not part of the devolved school management scheme.

Secondary Support for Learning Teaching

Available budgeted fte is allocated proportionally across Secondary schools based on:

- 40% Pupil Roll
- 60% Clothing and Footwear Grant Pupils of feeder primaries

Allocations will be reviewed on a 3 yearly basis

Pupils Support Assistants – Core Allocation

Available budgeted fte is allocated proportionally across Primary and Secondary schools based on:

- 40% Pupil Roll
- 60% Clothing and Footwear Grant Pupils of feeder primaries

Allocations will be reviewed on a 3 yearly basis.

Primary based Pupils Support Assistants' maximum contract is 27.5 hours.

Secondary based Pupil Support Assistants maximum contract is 30 hours.



Pupils Support Assistants – Exceptional Need

In exceptional circumstances a school may also receive an additional allocation to the core allocation. This may be put in place if a child or children’s need is not able to be met through the core allocation. Exceptional need allocations may be considered for schools with a small pupil roll or low levels of deprivation where children and young people have at least 1 of the following:

- An ASD diagnosis that impacts significantly on participation in learning or is currently under assessment
- Complex health and/or learning needs
- Significant Social and Emotional Behavioural Needs

Where exceptional need arises during the year, this should be discussed with the Inclusion QIO for the school.

Additional Support Needs – Intensive Support Provision (ISP)

ISP Principal Teacher

Each ISP will have a teaching Principal Teacher (PT) who will have 0.1 fte of management time for each ISP class.

ISP Primary Teaching Staffing Standard

1.11fte Teaching will be allocated per each class of 8 pupils. The PT teaching commitment will be included in this allocation. The class will not exceed the equivalent of 10 full-time pupils per teacher.

ISP Secondary Teaching Staffing Standard

1.0fte Teaching will be allocated per each class of 8 pupils. Reduced class contact time is included in the Secondary teaching allocations as ISP pupils are included in the overall secondary pupil roll. The PT teaching commitment will be included in this allocation. The class will not exceed the equivalent of 10 full-time pupils per teacher.



ISP Pupil Support Assistant Staffing Standard

In a Primary setting one 27.5hr Pupil Support Assistant (PSA) will be allocated per each class equivalent of 8 pupils. In a Secondary setting one 30hr PSA will be allocated per each class equivalent of 8 pupils. If the overall number of children in the ISP exceeds the equivalent of 8 full-time pupils per class, then additional PSA hours may be allocated based on needs up to a maximum of an additional 27.5/30 hrs depending on setting.

Worked Example

Secondary Integrated Support Provision with 3 classes with a maximum of 8 full-time equivalent children in each class.

PT management time	0.30 (3 classes x 0.10 fte)
Teaching fte	3.00 fte
Total Teaching fte	3.30 fte
PSA hours	3 x 30hr



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Devolved School Management Formula Calculations

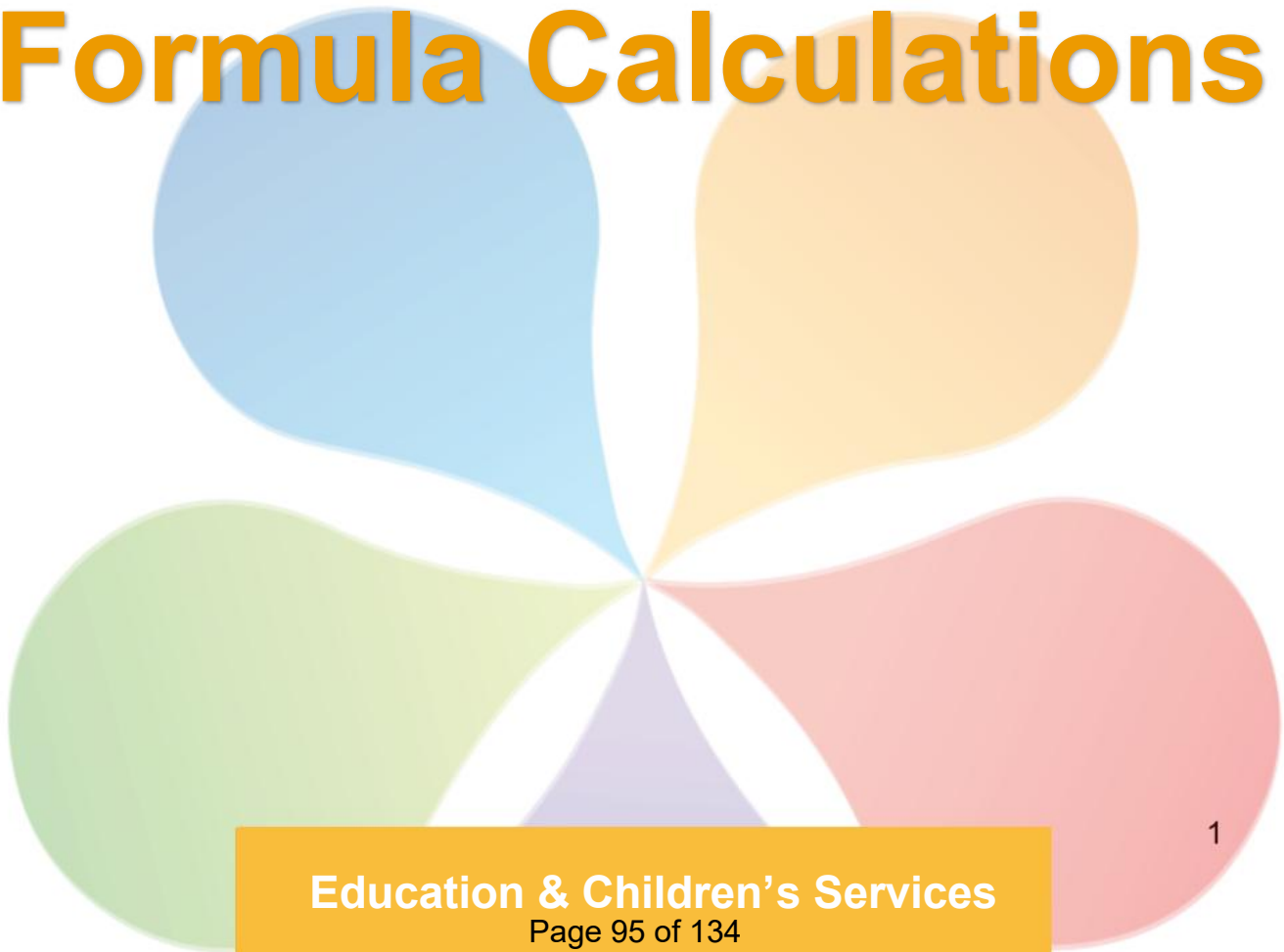




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Staffing

Staffing Budgets will be allocated as per the staffing standards outlined in the Perth and Kinross Devolved School management scheme appendices.

Supply Cover

The Employee Support Team, Corporate and Democratic Services is responsible for providing a service to schools by allocating supply teachers and other staff as and when required.

All supply cover is devolved with the exception of any centrally funded Training & Development Events. It is essential that a code is obtained for centrally funded training supply **before** the timesheet is submitted.

Once the supply teacher has completed a visit to the school, they should then complete their timesheet accurately and pass to the Headteacher for authorisation and coding. It is essential that clear details of the reason for the cover, the name of person covered (if applicable) and the correct financial code is entered on the timesheet.

The Financial code breakdown is:

Company	Service	Analysis	Project Code	Subjective	Supply
1	20	School code	Supply Type	000403	Teacher
1	20	School code	Supply Type	000200	Single Status

Supply Type	Project Code
General	0000
Training	0001
Sickness	0002
Maternity	0003
Vacancy	0004



Supply Budget

Nursery

Teachers	£272 x 3 days per class committed FTE (full time equivalent) + small school allowance:
Small School Allowance	Schools < 110 pupils receive an additional £250.00 per FTE
Single Status	£105 x 5 days x FTE

Primary

Teachers	£272 x 3 days per class committed FTE (full time equivalent) + small school allowance
Small School Allowance	Schools < 110 pupils receive an additional £250.00 per FTE
Single Status	£57.50 x 5 days x FTE

Secondary & All through

Teachers	£272 x 4 days per class committed FTE (full time equivalent)
Single Status	£57.50 x 4 days x FTE



Special

Teachers	£272 x 3 days per FTE (full time equivalent) + small school allowance
Small School Allowance	Schools < 110 pupils receive an additional £250.00 per FTE
Single Status	£57.50 x 5 days x FTE

Primary Long Term absences

Primary absences will be classed as long term when the total number of consecutive working days absent is more than 10 days.

At year end, Primary school long term absence cover costs will be assessed and if available budgets allow, adjustments may be made to offset any overspend on total supply budgets caused by long term absence. Priority will be given to schools who have class committed Headteachers. Final decision lies with Education and Children's Services Senior Management team.

Secondary Maternity costs

At year end, maternity cover costs will be assessed and if available budgets allow, adjustments may be made to offset any overspend on total staff budgets caused by these maternity cover costs. Final decision lies with Education and Children's Services Senior Management Team.

Staff Training and Review

Schools are allocated a Staff Training and Review Budget within DSM.

The devolved budget covers all costs of training and review for all staff within the school under the responsibility of the Head Teacher.

Code **1 / 20 / school code / 0001 / *******

All travel and subsistence costs relating to Staff Training should be charged to the schools devolved Travel and Subsistence budget.



Basis of calculation:

Allocation based on roll size plus lump sum.

Standalone Nursery Roll £

1 - 114	125
115 - 149	250
150 +	375

Lump Sum 300

Nursery and Primary Roll £

1 - 49	38
50 - 99	63
100 - 199	175
200 - 299	300
300 - 399	375
400 - 499	450
500 +	550

Lump Sum 200

Secondary Roll £

1 - 299	375
300 - 599	875
600 - 799	1,000
800 - 999	1,500
1000 - 1399	1,875
1400 +	2,500

Lump Sum 1,250



Special Roll £

1 - 24	250
25 - 49	375
50 +	500

Lump Sum 500

Supplies and Services

Per Capita

Subjective - various codes

'Per Capita' is the provision to schools for the purchase of books and educational equipment for pupils. Schools have the freedom to identify the resources they require. This allows schools to target support directly at the areas that have been identified as priorities in the school plan.

The budget, allocated in April, is based on the previous September census figures and an allocation is given per pupil. **Please note this will be your full year allocation. No adjustment will be made to the budget during the financial year.** An additional allowance is given to small schools.

Photocopying costs must be met from the school Per Capita allowance and it is important that adequate monies remain to cover photocopying charges for the year as well as for the cost of purchasing photocopying paper.



Basis of calculation:

Per Capita rate per pupil plus small school allowance.

Per capita rate per pupil

£

Nursery school pupils	37.75
Primary school pupils	30.90
Secondary school pupils – S1/2	30.60
Secondary school pupils – S3/6	61.20
Special Nursery school pupils	61.70
Special Primary school pupils	61.70
Special Secondary school pupils	66.90

Small School Allowance

Nursery / Primary / Special Roll £

1 - 19	184.90
20 - 49	154.10
50 - 75	123.30
76 - 100	92.50
101 - 125	61.70
126 - 150	30.90

Secondary Roll £

6 year school < 350	2,448.00
6 year school 351 – 500 pupils	1,836.00
6 year school 501 – 600 pupils	1,224.00
6 year school 601 + pupils	0



Outwith per Capita

Subjective - various codes

Outwith Per Capita (OPC) is issued mainly for the purchase of educational equipment, maintenance of equipment and postage. Where Health and Safety matters apply e.g. PE equipment, the school must undertake safety and maintenance work. In the case of other maintenance, it is advisable for schools to make allowances for the upkeep of equipment.

Basis of calculation:

Outwith Per Capita rate per pupil plus small school allowance.

Outwith Per Capita rate per pupil £

Primary/Nursery school pupils	8.40
Secondary school pupils	13.80
Special school pupils	13.90

Other Allowance

Nappy Unit - Fairview	830.70
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Small school allowance

Nursery / Primary / Special Roll £

1 - 19	29.10
20 - 49	24.30
50 - 75	19.40
76 - 100	14.60
101 - 125	9.70
126 - 150	4.90

Secondary Roll £

4 year school <350 pupils	308.90
6 year school <350 pupils	411.80
6 year school 351-500 pupils	308.90
6 year school 501-600 pupils	205.90
6 year school 601+	0



Cleaning Materials

Subjective - 230302

This budget is for the provision of supplies that are used by staff undertaking duties in maintaining the schools, for example paper towels.

Schools can therefore prioritise their needs and purchase the necessary supplies.

Basis of calculation:

Nursery	£48.50 per school + £6.30 per pupil
Primary	£48.50 per school + £2.10 per pupil
Secondary	£48.10 per school + £2.10 per pupil

Services with Strong Start Two Provision Lump sum £400

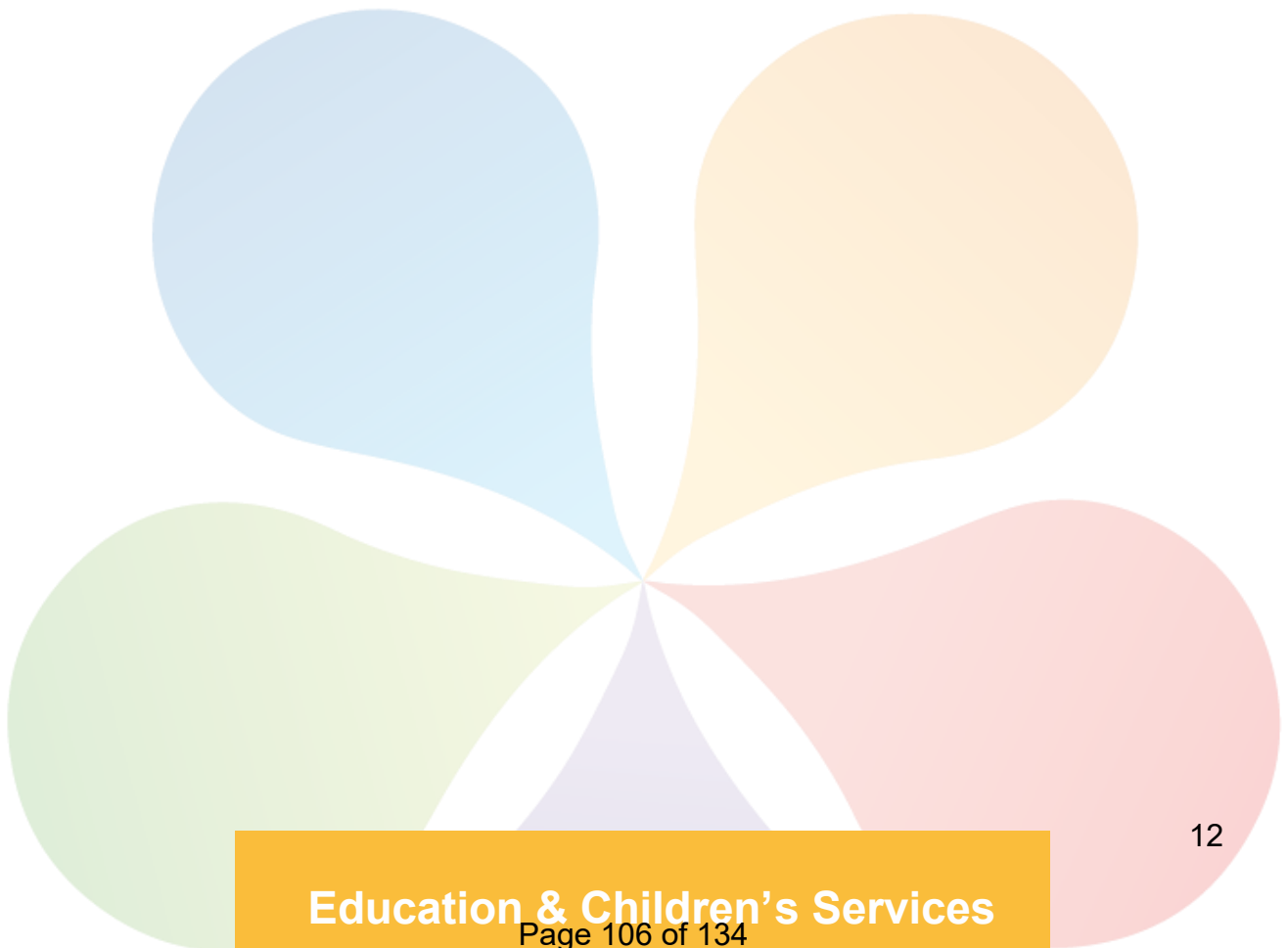
Please note if a school is based in a Community Campus there will be no allocation for cleaning materials except for the Nursery allocations. Axiom will provide cleaning services under contract.

Recreation Facilities

Recreation Facilities allocations are based on individual setting requirements.



Schools that have a permanent shared headship arrangement are also given an additional allowance based on the distance between the two schools.



PERTH AND KINROSS COUNCIL

Lifelong Learning Committee

31 January 2022

**SCHOOL ESTATE TRANSFORMATION PROGRAMME
CLEISH PRIMARY SCHOOL**

Report by Executive Director (Education and Children's Services)

(Report No. 22/22)

PURPOSE OF REPORT

This report provides an update on the position of Cleish Primary School as part of the School Estate Transformation Programme.

This report seeks approval for the Executive Director (Education and Children's Services) to reduce the capacity of the school from 64 pupils to 50 pupils to facilitate improvements to the suitability of the school in the short term. The report notes the intention to explore in more detail, the preferred option (Option 5) of a major refurbishment of the school in the medium term.

1. BACKGROUND/MAIN ISSUES

- 1.1 The Learning Estate is a significant and valuable asset to the communities of Perth and Kinross. Perth and Kinross Council (PKC) has invested £81m since 2015/2016, and between 2021 and 2029, the Council will invest a further £160m in the Learning Estate.
- 1.2 The Learning Estate Strategy ([Report No. 21/202 refers](#)) 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.
- 1.3 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.
- 1.4 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.
- 1.5 The Council's Transformation Strategy 2015-2020 'Building Ambition' and Organisational Development Framework were approved by the Council on 1 July 2015 ([Report No. 15/292 refers](#)). Together, they detail how PKC will deliver transformation over the next five years.

Accompanying the strategy is a programme of major reviews which are considered to be key drivers and enablers of transformation across the organisation. The School Estate Transformation Programme is one such review.

- 1.6 On 24 August 2016, Lifelong Learning Committee ([Report No. 16/347 refers](#)) approved principles to be used as a basis for the transformation review, 'Securing the Future of the School Estate'.

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 buildings¹ within the school estate should be prioritised for replacement.

- 1.7 On 2 November 2016, Lifelong Learning Committee ([Report No. 16/485 refers](#)) approved the development of a number of options appraisals, to consider in detail, schools which were identified as requiring further consideration.
- 1.8 Cleish Primary School was included in the School Estate Transformation Programme due to the condition and suitability rating of the school. The overall condition of the building was rated "C" (Poor – showing major defects and/or not operating adequately). The overall suitability of the building was rated "C" (Poor – showing major problems and/or not operating optimally). There were life expired buildings on the school site.
- 1.9 A high level feasibility study was undertaken on the school which informed options for improving the suitability and condition of the school building.
- 1.10 On 27 March 2019, Lifelong Learning Committee ([Report No. 19/94 refers](#)) noted that a more detailed analysis of the feasibility was required. This report provides an update on progress to date.

2. CLEISH PRIMARY SCHOOL

- 2.1 The capacity of Cleish Primary School is 64. The school roll as at November 2016 was 52, which is an occupancy rate of 81%. The school roll, detailed in Table 1 below, is currently 42², which is an occupancy rate of 66%.
- 2.2 Table 1 below, details the current and projected school roll. The school roll is projected to decline to 38, which is an occupancy rate of 59%, by 2025/26.

¹ Life expired buildings are defined as buildings which are uneconomic to maintain.

² As at 3 December 2021.

Cleish Primary School – Current and Projected School Roll

	2021/22	2022/23	2023/24	2024/25	2025/26
Pupils in School	42	40	34	36	38
Capacity	64	64	64	64	64
Occupancy	63%	59%	50%	55%	59%

Table 1: Cleish Primary School – Projected School Roll

2.3 Future projections are developed through a combination of data on children aged under five living in the catchment area; provided by the NHS; and past trends which have impacted the school roll. Rolls at Cleish Primary School are impacted by:

- Pupils from the Cleish Primary School catchment area attending other PKC primary schools through placing requests;
- Pupils from the Cleish Primary School catchment area attending non-PKC schools; and
- Pupils from outwith the Cleish Primary School catchment area attending Cleish Primary School through a successful placing request.

2.4 The projections in Table 1 reflect a reduction in the number of under-fives living in the area in recent years. Table 2 below shows the NHS data for expected P1 intakes from 2012/13 to 2020/21 as well as the actual P1 intakes.

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Expected P1 intake	15	14	11	13	10	6	5	9	7
Actual P1 intake	8	9	5	7	6	3	3	8	2

Table 2: Cleish Primary School P1 intake 2012 to 2020

2.5 The P1 intake can also include placing requests, however pupils can join and leave the school throughout the school year if there is capacity. There are currently 8 children in the school who live outwith the catchment area, from a roll of 42. Placing requests for Cleish Primary School from 2012 to 2020 are as follows:

	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Placing requests	4	5	2	2	1	8	3	2	4

Table 3: Placing requests Cleish Primary School 2012 to 2020

2.6 Cleish Primary School is currently classified as an ‘accessible rural’ school in terms of the Scottish Government’s Urban Rural Classification.

2.7 There is minimal development for the Cleish area contained within the Housing Land Audit³ (HLA) 2020 and Local Development Plan (LDP2). Therefore, it is unlikely that the school roll will increase because of planned housebuilding.

³ The Housing Land Audit is compiled by PKC Planning on an annual basis. It estimates build out rates for sites over 5 houses across Perth and Kinross.

2.8 Cleish Primary School – Existing Accommodation

The accommodation at Cleish Primary School consists of a main school building and two adjacent mobile buildings. The main school building is a C listed building with Historic Environment Scotland.

Main School Building

- Two teaching spaces (25 pupils and 14 pupils);
- Office accommodation;
- Staff toilets; and
- Storage space.

A floor plan of the main school building is provided as Appendix 1. The smaller of the teaching spaces, which can accommodate up to 14 pupils, was not originally used as a teaching space. It is understood that it began to be used, initially on a temporary basis around 2002 to accommodate the school roll.

Classroom Block

- One teaching space (25 pupils);
- Storage space; and
- Pupil toilets.

This building is classed as life expired¹.

Dining Block

- Dining Area; and
- Kitchen (servery kitchen – not a production kitchen as meals are delivered from Milnathort Primary School).

This building is classed as life expired¹.

2.9 The condition rating for the school primarily relates to the classroom and dining blocks being life expired but upgrades are also required to electrics, heating and windows. In terms of suitability, access to office spaces is through classrooms and there are no pupil toilets in the original school building.

3. PROGRESS AND OPTIONS

3.1 An initial feasibility study was commissioned to examine whether the condition and suitability rating of the school could be improved. The school roll has decreased in recent years, and it was proposed that for the feasibility study that the capacity of the school could be reduced to 50 pupils, with a minimum of two classroom spaces.

- 3.2 In addition to two classrooms, the brief for the feasibility included:
- The provision for sufficient staff and pupil toilets being accessible from within each building;
 - General purpose space;
 - Office accommodation; and
 - Dining, including servery kitchen and external play space. PE was to continue to be accommodated in the village hall, hence supporting its sustainability.

- 3.3 The feasibility study was also to indicate whether the school could remain operational during any proposed works or whether pupils would need to be decanted.

Initial Feasibility

- 3.4 Options considered as part of this feasibility study included:

Option 1 – Extension for 50 pupils

- a) Build an extension on to the existing accommodation for the new servery and dining, classrooms and ancillary accommodation and use the existing building for administration.
- b) Alternatively, build an extension on to the existing accommodation for administration, classrooms and ancillary accommodation and use the existing building for servery and dining.

Option 2 – Extension for 75 pupils

This option considered similar outcomes as detailed in Option 1, however, three classrooms and a capacity of 75 pupils was considered.

Option 3 – Temporary accommodation

This option explored the possibility of replacing life expired accommodation with new temporary accommodation.

- 3.5 The conclusion of the feasibility study was as follows:

Due to the shape and challenges of the existing site (Appendix 2), it was not possible to create an extension to the original building and therefore the school would need to continue to operate out of two buildings on the existing site.

Therefore Options 1 and 2 were ruled out. The feasibility also noted that regardless of the option chosen, access for contractors during any period of refurbishment would likely be challenging and issues in respect of buildability could be encountered. Due to this, the costs of the project were highly uncertain.

Any new temporary building would need to be replaced sooner than a conventional building and would not provide the same energy efficiency standards. For this reason, Option 3 would not be best value.

Option 4 – Alternative site

- 3.6 In considering how the access issues could be addressed, a number of potential sites within Cleish were identified. The location, access and potential buildability of each site was considered at a high level with one site being preferred.
- 3.7 The Local Development Plan for Cleish states: “Cleish is designated as a Conservation Area and is unique in Kinross-shire by merit of spatial arrangement of the dwellings and its open spaces. A tight settlement boundary has been drawn and open spaces identified to limit any significant future growth to protect the historic environment.”

Further growth within the village is not encouraged, and the settlement boundary has been drawn to reflect this position. The conservation area boundary has been drawn to include the fields surrounding the village to effectively create a “buffer zone” to protect its historic character and setting (Appendix 3).

- 3.8 Discussions have taken place with Planning Officers to determine whether planning permission could be gained for a new build school at the preferred location. It was determined that the sites highlighted in the study, and any new school, would have to be justifiable on the basis of operational and locational need. In addition, it would need to be demonstrated that all alternative options to a new build school on a new site have been explored fully and the reasons that they have been discounted presented.

Option 5 – Two buildings on the current site for 50 pupils

- 3.9 In consideration of the previous options, a further feasibility option was developed. This option is to replace the life expired mobile buildings with a new permanent standalone building and also to reuse as much as possible of the existing accommodation to provide enhanced school facilities within the existing school site boundary.
- 3.10 The outcome of the feasibility study concluded the following accommodation could be provided in a new building which will replace the life expired buildings:
- Classroom provision for 50 pupils;
 - Toilet facilities for staff and pupils with accessible toilet and personal care provision;
 - General purpose space; and
 - Resource store.
- 3.11 The original school building would accommodate dining and a servery kitchen and other ancillary accommodation, including office accommodation and a staff room.

The building would be totally refurbished as part of the project. The renovation of the original school building will be subject to restrictions due to its listed status and position within a conservation area.

- 3.12 The reorganisation of facilities between both buildings will provide a more suitable environment including improved room adjacencies, with spaces used for administration, accessed independently from teaching spaces.
- 3.13 Access routes are restricted by the external walls of the existing listed building located to the front of the site and the existing stone boundary wall to the west. This means that no large vehicles will be able to access the rear of the site to carry out demolitions and follow-on construction works. Access routes are also required for maintenance and emergency vehicle access. The feasibility puts forward options for addressing this.
- 3.14 Decant accommodation would be required during any period of construction under this proposal. The most likely solution would be for pupils to be accommodated at a neighbouring school.
- 3.15 An initial cost for Option 5 has been estimated at approximately £3 million. This cost will increase as key elements, including the alternative access to the school site and any decant requirements, are not included. It is likely that any decant would involve transport to a neighbouring school. Additional transport costs are likely to be between £13,000 and £23,000 per annum depending on the cost of the contract.

4. SUMMARY/PROPOSALS

- 4.1 Several options have been considered to improve the condition and suitability of Cleish Primary School. These options are summarised in Table 4 below as follows:

Option	Description	Outcome	Conclusion
Option 1	Extension for 50 pupils	Due to the shape and challenges of the existing site, it was not possible to create an extension to the original building.	Not feasible.
Option 2	Extension for 75 pupils	Due to the shape and challenges of the existing site, it was not possible to create an extension to the original building.	Not feasible.
Option 3	Temporary accommodation	Temporary accommodation would need to be replaced sooner than a conventional building and would not have the same energy efficiency.	Not best value and may not meet energy standards.

Option 4	Alternative sites	The preferred site is outwith the boundary of the village and as such all other options to improve the school would have to be ruled out to achieve planning permission.	Would not achieve planning permission at this point.
Option 5	Two buildings on the current site for 50 pupils	The feasibility for this option meets the brief and deals with the site challenges. Further detailed design work is required before costs and a final proposal is confirmed.	Recommended option.

Table 4: Cleish Primary School – Summary of Options

- 4.2 The feasibility study for Option 5 has identified solutions which will improve the suitability and condition of the school, including the replacement of life expired buildings, which will allow the school buildings to operate efficiently and independently of each other in the long-term.
- 4.3 The feasibility study has delivered a scope of works which requires further design development including identifying solutions to key issues such as improving access to the site in order for works to take place.
- 4.4 There are a number of capital projects already underway and planned within the Learning Estate. It is therefore likely, that a project to take forward Option 5, would be four to five years away from beginning on site.
- 4.5 The existing listed building maintenance cost for the next five years has been estimated at £200,000. This cost is to maintain the building condition for its current use and further works will be required as part of the delivery of Option 5. Maintenance works would also be required for the two life expired buildings. These works will consider the timing of the replacement building project.
- 4.6 The lower pupil numbers, and the possibility of maintaining a maximum of two classes, would allow the school to operate slightly differently. A small project to create pupil toilets, breakout space and provide alternative visitor access, would improve the suitability of the school for staff and pupils.
- 4.7 Section 2.2 in this report indicates that the school roll is projected to remain below 50 pupils based on current information regarding under-five's living in the catchment area and considering historic trends for placing requests both in and out of the school. Information on historic pupil rolls show that the school roll has exceeded 50 pupils in the past, however, this is because of placing requests being granted into the school.
- 4.8 The Council's School Admission Policy sets out the arrangements for the placing of catchment pupils and handling of placing requests. Children normally resident within the catchment area of Cleish Primary School have priority over all other children. This proposed reduction in the school capacity would not impact catchment children, and based on current projections, there may continue to be sufficient capacity for placing requests to also attend the school.

- 4.9 The reduction in school capacity will also support the sustainability of the school, through increasing occupancy. This will mean that although the school roll is decreasing, the use of the small classroom to improve the suitability will result in the school operating at above 60%, in line with the principles of the transformation review, as detailed in Table 5 below.

	2021/22	2022/23	2023/24	2024/25	2025/26
Pupils in School	42	40	34	36	38
Capacity	50	50	50	50	50
Occupancy	84%	80%	68%	72%	76%

Table 5: Cleish Primary School occupancy based on capacity of 50 pupils

- 4.10 It is proposed therefore, that the capacity of the school is reduced from 64 pupils to 50 pupils and that work takes place to improve the condition and suitability of the building in the short-term. This will allow the school to operate more effectively while the larger refurbishment programme detailed in Option 5 is developed further.

5. CONCLUSION AND RECOMMENDATIONS

- 5.1 A range of options have been considered to improve the condition and suitability of Cleish Primary School. The feasibility study for Option 5, carried out in 2021, has identified at a high level, an option that would improve the suitability and condition of the school and replace life expired buildings in the medium to long term.
- 5.2 The project is complex and more design development will be required to establish what can be delivered and at what cost.
- 5.3 There are several capital projects in the Learning Estate which are already underway or planned. It is therefore likely that the project detailed in Option 5, is at least four years away from beginning on site, assuming the detailed design is feasible, and all approvals are granted.
- 5.4 There are a number of works, detailed in paragraph 4.6, that could be undertaken to improve the condition of the building and to improve suitability/operation of the school in the short to medium term. There will still be a requirement to replace the life expired units through a major refurbishment project in the medium term.
- 5.5 Pupil numbers are decreasing and a reduction in the capacity of the school from 64 pupils to 50 pupils will facilitate short-term improvements being able to be undertaken and increase the occupancy rate of the school.
- 5.6 It is recommended that the Committee:
- (i) Notes the proposal to improve the suitability and condition of Cleish Primary School in the short, medium and long-term;
 - (ii) Notes the complexities associated with the refurbishment project detailed under Option 5 and the uncertainties over cost;

- (iii) Notes that more detailed design work on the most recent feasibility, as described under Option 5, will be taken forward;
- (iv) Notes the proposal at 4.6 in the report to undertake works to improve the condition and suitability of the building allowing the school to operate more effectively while detailed design work takes place; and
- (v) Approves that the capacity of Cleish Primary School is reduced from 64 pupils to 50 pupils.

Author

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Approved

Name	Designation	Date
Sheena Devlin	Executive Director (Education and Children's Services)	19 January 2022

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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	Yes
Communication	
Communications Plan	Yes

1. Strategic Implications

Community Plan/Single Outcome Agreement

1.1 This section should set 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 short to medium term project detailed in paragraph 4.6 of the main report, however the costs of this proposed project are not available as yet. Other financial implications are noted in the main body of the report.

Workforce

2.2 There are no workforce implications other than those noted in the main body of the report.

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.

This proposal has been considered under the Corporate Equalities Impact Assessment process (EqIA) with the following outcome:

- (i) Assessed as **relevant** and an EQIA will be considered as part of the design development project.

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 N/A.

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 Meetings have taken place with the school and the Parent Council regarding progress.

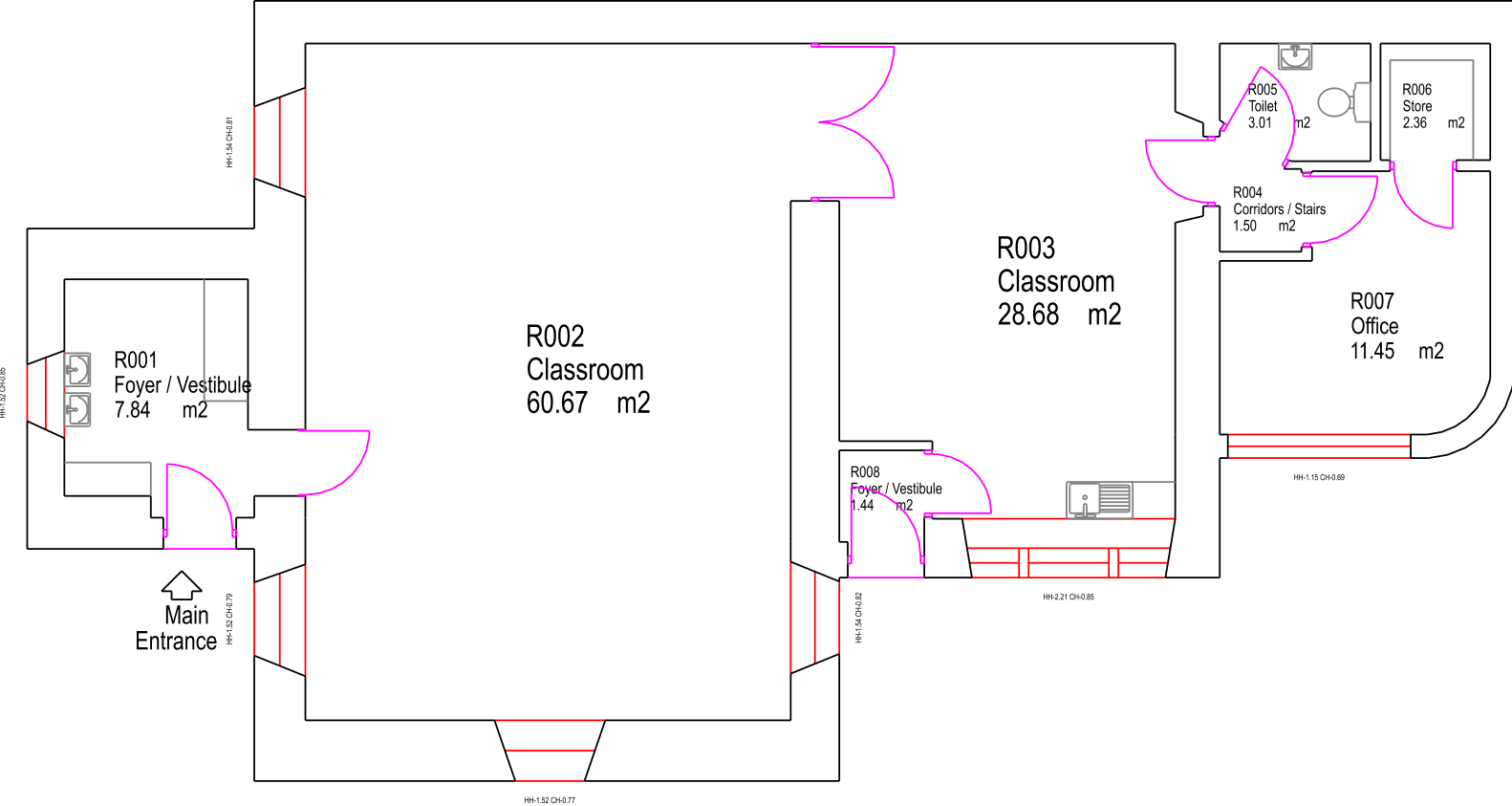
2. BACKGROUND PAPERS

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 Appendix 1 - Cleish Primary School – Main Building Layout
Appendix 2 - Cleish Primary School Site
Appendix 3 - Cleish Settlement and Conservation Area Boundary

Appendix 1



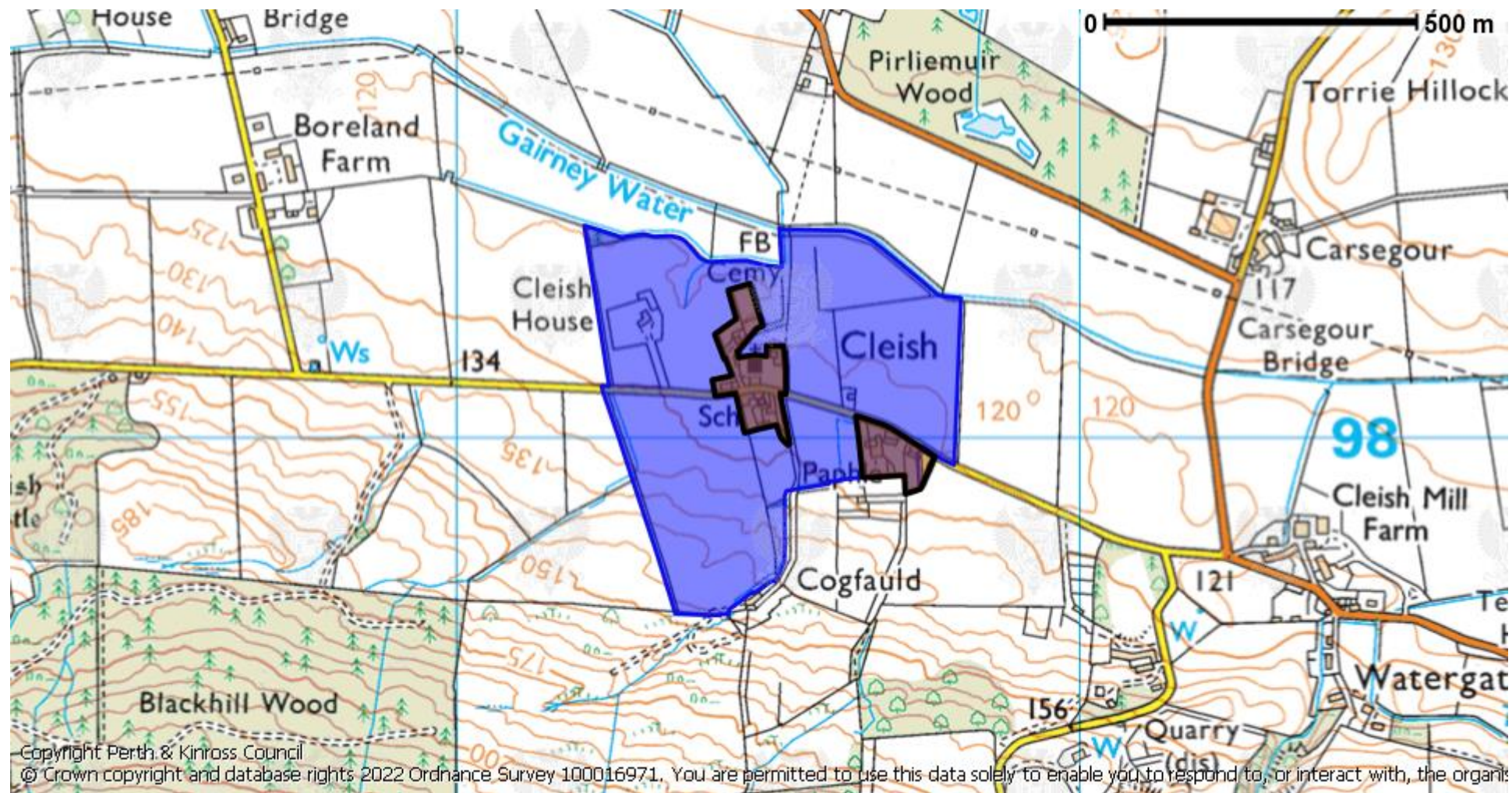
Cleish Primary
Main Building
Ground Floor

Appendix 2
Cleish Primary School Site



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Appendix 3
Cleish Conservation Area (Blue) Boundary and Settlement (Brown)



PERTH AND KINROSS COUNCIL

Lifelong Learning Committee

31 January 2022

**SCHOOL NAMING CONSULTATION FOR THE NEW PRIMARY SCHOOL
AT NORTH MUIRTON**

Report by Executive Director (Education and Children's Services)

(Report No. 22/23)

PURPOSE OF REPORT

This paper reports on the outcome of the consultation process held to develop a suitable name for the new primary school which will be built on the site of North Muirton Primary School. The new school building will replace Balhousie Primary School and North Muirton Primary School. The report makes a recommendation as to the name of the new primary school.

1. BACKGROUND/MAIN ISSUES

- 1.1 An options appraisal was presented to Lifelong Learning Committee on 24 January 2018 ([Report No. 18/15 refers](#)) for Balhousie Primary School and North Muirton Primary School. The options appraisal report proposed to formally embark upon a statutory consultation to close Balhousie Primary School and build a new primary school on the site of North Muirton Primary School.
- 1.2 The statutory consultation report of 31 October 2018 ([Report No. 18/349 refers](#)) informed Lifelong Learning Committee of the outcome and findings of the statutory consultation exercise undertaken in respect of the formal proposal to close Balhousie Primary School. Lifelong Learning Committee approved that the delineated catchment area of North Muirton Primary School be permanently extended to subsume the whole delineated catchment area of Balhousie Primary School and that pupils from Balhousie Primary School catchment area permanently receive their education at the new school on the North Muirton Primary School site.
- 1.3 Education Scotland noted as part of the statutory consultation that the Council would be working with pupils, parents, staff and the wider communities to establish the identity, ethos and culture of the new school and that this would take account of the wide range of views to ensure that the identity of the new school was truly representative of both communities. The first step in this process is the creation of a name for the new primary school. The name of the school will be the basis for creating a school identity, including uniform and badge, as well as for the school's vision and values. This therefore required a consultation exercise with both communities with the aim of providing a name which reflects and connects with both communities.

2. PROCESS

- 2.1 The process for creating a name for Bertha Park High School was adopted again, with some adjustments, to reflect the different circumstances of replacing two primary schools with one new primary school. This process was endorsed by the North Perth Primary School Project Board on 21 July 2021.
- 2.2 The process comprised of four stages:
- The setting up of a Naming Reference Group (NRG) for the purpose of both agreeing the consultation process and choosing a shortlist of names;
 - The generation of suggestions through an online survey;
 - The selection of a shortlist of names by the NRG; and
 - Consultation of all contributors as to their preferred choice of name from the shortlist.
- 2.3 The first stage, the convening of the NRG, took place on 16 September 2021. Pupils from each school were equally represented on the NRG along with staff, parents/carers, community representatives, local elected members, and the Conveners of Lifelong Learning Committee. Council Officers supported the consultation process.
- 2.4 The naming process was agreed by the NRG at the inaugural meeting on 16 September 2021. The NRG also discussed the process for gathering name suggestions, contributed to the scope of the consultation in terms of approved groups of consultees and how best to engage local communities in the consultation.
- 2.5 The second stage, a survey for name suggestions, was open between 27 September 2021 and 15 October 2021. The survey gave a range of stakeholders, including pupils, parents, staff, from both schools and local community and local elected members from both communities the opportunity to submit their proposals for a name for the new primary school via an online survey.
- 2.6 Background information and guidance was provided in the initial survey to assist with making suggestions as follows:
- Names might reflect a local geographical or historical feature; (suggestions should not be generically Scottish, eg "Thistle Community School" nor reflect a topical famous person, either current or historical);
 - Names which avoid confusion with other schools in the Perth and Kinross area; and
 - Names that will be able to be used on signage, uniform and branding, taking account of length and spelling.
- 2.7 Discussions and other activities regarding the naming process were held with primary classes from both schools. It was considered important to ensure the full cohort of young people who may attend the new school should have a significant role to play in the naming of their new school.

2.8 All suggestions received through the survey were acknowledged and collated centrally. There were 269 responses. Most responses were from pupils (199) followed by parents/carers (45), community (19) and staff (6).

Each suggestion was checked against the naming criteria with suggestions discounted at this stage if they did not meet with the agreed naming criteria.

2.9 In the third stage, the NRG met on 26 October 2021 to discuss in detail the responses and to reach a decision on a shortlist of names for the new primary school. Each member of the group was allowed to put forward three suggested names for the shortlist.

2.10 The group unanimously agreed on a shortlist of four possible names:

- Argyll Road Primary School;
- Balmuir Primary School;
- Balmuirton Primary School; and
- Riverside Primary School.

2.11 Consultation on the shortlist of four proposed names, the fourth stage, took place via online survey between 28 October and 5 November 2021. The consultees were the individuals who originally contributed a suggested name for the new school.

2.12 The results of the survey were as follows:

Proposed Name	No. of votes	% of the vote
Argyll Road Primary School	42	17%
Balmuir Primary School	18	7%
Balmuirton Primary School	44	17%
Riverside Primary School	150	59%
TOTAL	254	

3. CONCLUSION AND RECOMMENDATION

3.1 A consultation process has taken place, involving pupils, parents, staff, the community, local elected members and the Conveners of Lifelong Learning Committee, which has proposed a preferred name that will support the establishment of the new primary school and its identity moving forward.

3.2 It is recommended that the Committee:

- (i) Approves the proposal to name the new primary school Riverside Primary School.

Author

Name	Designation	Contact Details
Carol Taylor	Service Manager (Resource Management)	ECSCCommittee@pkc.gov.uk 01738 475000

Approved

Name	Designation	Date
Sheena Devlin	Executive Director (Education and Children's Services)	20 December 2021

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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	Yes
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 related to the new name of the school, however, these costs will be addressed through the project budget.

Workforce

2.2 There are no workforce implications.

Asset Management (land, property, IT)

2.3 There are no asset management implications.

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.

This section reflects that 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 The Head of Legal and Governance Services has been consulted in the preparation of this report. Any consultation would require to be carried out in accordance with the Schools Consultation (Scotland) Act 2010.

3.5 N/A.

Risk

3.6 N/A.

4. Consultation

Internal

4.1 Education & Children's Services Senior Management Team has been consulted in the preparation of this report.

External

4.2 The consultation is detailed in the main body of the report. Each school was equally represented in terms of consultation; pupils from each school, along with staff, parents/carers, community representatives, local elected members and the Conveners of Lifelong Learning Committee, supported the consultation process.

5. Communication

5.1 A communication plan was prepared which supported effective communication and engagement with stakeholders. A range of methods were used to consult with internal and external stakeholders as identified in the scope, such as phone calls, virtual meetings, briefings and focus groups.

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 N/A.

