

## PERTH AND KINROSS COUNCIL

## Lifelong Learning School Estate Sub-Committee

2 June 2016

## School Estate Programme Progress Update

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

**PURPOSE OF REPORT**

This report updates Committee on the progress and proposals for delivering the current school projects within the Education and Children's Services School Estate Programme. It details key milestones which have been achieved since the last update to Committee on 3 March 2016 ([Report No. 16/107 refers](#)).

**1. BACKGROUND/MAIN ISSUES**

- 1.1 The School Estate Strategy 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.
- 1.2 The strategy is delivered through the School Estate Management Plan (SEMP) which is primarily funded through the Council Capital Programme.
- 1.3 The Education and Children's Services (ECS) Capital Programme details the priorities for the School Estate over a rolling seven year period, and is reviewed on an annual basis.

**2. PROPOSALS**

- 2.1 This report updates Committee on progress and proposals for delivering the current capital projects within Education and Children's Services School Estate Programme. The focus of the programme is on:
  - Primary School Upgrades/Replacements.
  - Secondary School Upgrades.
  - Design, Build, Finance & Manage (DBFM) Project.

**3. UPDATES ON CURRENT PROGRAMME**

- 3.1 Detailed updates on all current projects are provided in Appendix A. The following projects have reached significant milestones since the previous School Estate Sub-Committee on 3 March 2016.
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## Significant Milestones/Key Information – Primary School Upgrade Programme

### **3.2 Inchtore Primary School**

Following engagement with the Inchtore Community Sports Committee (ICSC), the proposed Multi Use Games Area (MUGA) will be developed as a synthetic pitch facility. This will be jointly funded by PKC and the ICSC.

The planning application has been submitted and a decision is expected mid-June. Construction will then begin during the school summer holidays.

### **3.3 Kinross Primary School**

On 29 October 2014, Lifelong Learning Committee ([Report No 14/467 refers](#)) approved the replacement of Kinross Primary School.

The planning application for the new school was lodged in March 2016 with a decision expected late June.

The current indicative programme details a December 2017 completion date for the school.

### **3.4 Tulloch Primary School**

On 29 October 2014, Lifelong Learning Committee ([Report No 14/467 refers](#)) approved the replacement of Tulloch Primary School.

The planning application for the new school was lodged in March 2016 with a decision expected late June.

The current indicative programme details a January 2018 completion date for the school.

## Significant Milestones – External Funding

### **3.5 Engineering Hub**

At School Estate Sub-Committee on 27 August 2015 ([Report no 15/337 refers](#)) it was reported that the Council had bid for funding towards creating a 'Vocational Engineering Hub'.

Site visits have been undertaken at the Perth Secondary Schools and project scope has been agreed for each site. Meetings have also been held with Perth College and a course proposal which supports integrated learning has been developed.

Significant Milestones – Design, Build, Finance and Manage (DBFM) Programme  
– New Secondary School

### 3.6 New Secondary School

Lifelong Learning Committee, on 4 November 2015 ([Report No. 15/515 refers](#)), approved the establishment of a new secondary school on a preferred site at Bertha Park, Perth from August 2019 and the arrangements to establish a new catchment area for the school and transfer arrangements for primary pupils.

Stage 1 has been received and approval is anticipated in June 2016.

In addition outline planning approval has been granted for the housing and associated facilities at Bertha Park.

## 4. CONCLUSION AND RECOMMENDATIONS

4.1 This report updates the School Estate Sub-Committee on the progress of the Education and Children's Services School Estate capital projects approved through the Capital Programme for 2015/16 to 2021/22.

4.2 The Committee is requested to note that significant milestones have been achieved since the previous Committee meeting held on 3 March 2016 including:

- A planning application has been lodged for the synthetic all weather facility at Inchtute Primary School. (3.2);
- The planning application has been lodged for the two new primary schools at Kinross (3.3) and Tulloch (3.4);
- The project scope for the engineering hub has been agreed(3.5) and;
- Receipt of Stage 1 for the new secondary school (3.6).

### Author(s)

Name	Designation	Contact Details
Carol Taylor	Service Manager (Resource Management)	01738 475595 <a href="mailto:CATaylor@pkc.gov.uk">CATaylor@pkc.gov.uk</a>

### Approved

Name	Designation	Date
Sheena Devlin	Director (Education and Children's Services)	05/05/2016

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## 1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

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

### 1. Strategic Implications

#### Community Plan / Single Outcome Agreement

1.1 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 The Perth and Kinross Community Plan 2013-2023 and Perth and Kinross Council Corporate Plan 2013/2018 set out five strategic 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 Policy Framework in respect of the following key policy area:

- Maximising Resources

## 2. Resource Implications

### Financial

2.1 The Council set a 7 year Capital Budget for 2014/15 to 2020/21 at its meeting on 13 February 2014 ([Report No. 14/45 refers](#)). Revisions to the budget for these 7 years have been considered by the Strategic Policy and Resources Committee throughout the year. The meeting of the Council on 12 February 2015 approved the Composite Capital Budget 2015/23 ([Report No. 15/37 refers](#)). Additional capital funding has been received from the Scottish Government for the implementation of capital works associated with the Children and Young People (Scotland) Act 2014.

2.1.1 Any additional revenue implications identified through either the existing capital programme, or future capital programmes, with the exception of the new secondary school, will require to be submitted as part of an expenditure pressure with a corresponding saving through the ECS revenue budget process.

2.1.2 There are no direct financial implications arising from this report other than those reported within the body of the main report and related business cases.

### Workforce

2.2 There are no direct workforce implications arising from this report.

### Asset Management (land, property, IT)

2.3 There are no direct asset management implications arising from this report other than those reported within the body of the main 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.

3.1.1 The information contained within this report has been considered under the Corporate Equalities Impact Assessment process (EqIA) with the following outcome and has been 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 these matters relate to the School Estate Strategy which is being considered under the Act as part of The Council's Asset Management Plan.

## Sustainability

- 3.3 Under the provisions of the Local Government in Scotland Act 2003 the Council has to discharge its duties in a way which contributes to the achievement of sustainable development. In terms of the Climate Change Act, the Council has a general duty to demonstrate its commitment to sustainability and the community, environmental and economic impacts of its actions.

The information contained within this report has been considered under the Act. However, no action is required as the Act does not apply to the matters presented in this report.

## Legal and Governance

- 3.4 The Head of Legal Services has been consulted in the preparation of this report.

## Risk

- 3.5 Individual risk profiles are in place for individual projects listed.

## **4. Consultation**

### Internal

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

### External

- 4.2 Participation and involvement of the community are critical to the ongoing and future success of school estate investment and an emphasis is placed on ensuring consultation, over and above that which might be required in terms of planning requirements and statutory consultation requirements.
- 4.2.1 A User Reference Group (URG), or equivalent, is set up for all major and large projects. The purpose of the URG is to assist with providing relevant local input to allow the Design Team to develop the outline concept design into an operational design. The formation of a URG is an invaluable source of information, and any project is reliant on this level of local detail.

## **5 BACKGROUND PAPERS**

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.

## **6 APPENDICES**

Appendix A – Detailed Updates on Current Projects.





## **Detailed Updates on Current Projects**

### **Milestones**

Milestones are key tasks within a project plan which mark completion of a significant or critical phase of work or a decision point.

In terms of the following projects the milestones have the following dates:

- The planned date is the original date planned for the project and does not change in the life of the project. These are generally aspirational dates based on a typical project.
- The actual date is the date the milestone is completed.
- The forecast date is the date which is currently projected for completion.

# ALYTH PRIMARY SCHOOL - REPLACEMENT AND REFURBISHMENT

**Reporting Period:** March 2016 to June 2016

## Overview

Alyth Primary School is a largely life-expired property requiring major investment. The school has been identified as having the highest maintenance requirement of any primary school in Perth and Kinross. It is also underutilised and inefficient in terms of layout and running costs.

The recommended option to upgrade the Victorian building and add a new-build element was approved at Lifelong Learning Committee on 29 January 2014 ([Report No. 14/22 refers](#)). It is anticipated the new school will be operational late February 2017.

## Sources of Funding

This project is fully funded by the ECS Composite Capital Programme. The funding for this project is £9,332,000.

## Progress Update

The Stage 1 report was formally accepted on 19 February 2015. An informal drop-in session was held on 26 January 2015 where the design was shared with Parents/Carers and the wider school community. The concept design was shared with the User Reference Group (URG) on 11 December 2014 and was well received.

The planning application has been approved and works have taken place to allow the old school to be vacated in advance of the main works starting.

Stage 2 has been approved and Construction of the new school began in January 2016.

Work continues on site with construction of the steel frame having been completed.

## Key Milestones

Milestone	Planned date	Actual Date	Forecast date
Submit NPR	December 2013	May 2014	
HubCo Accept NPR Stage 1 Commences	January 2014	September 2014	
Stage 1 <sup>1</sup> Agreed	April 2014	February 2015	
Planning Application Submitted	December 2014	March 2015	
Planning Application Agreed	May 2015	June 2015	
Stage 2 <sup>2</sup> Agreed	January 2015	January 2016	
Site Start	March 2015	January 2016	
School Operational	August 2016		February 2017
Demolition and Completion of External Works	October 2016		May 2017

## Current Issues

- The timescales for completion of the build remain challenging
  - Additional asbestos has been identified in the Victorian Building which may put pressure on the delivery timescale and cost of the project.

<sup>1</sup> Stage 1 is equivalent to RIBA Stage C/D, which is a costed outline design

<sup>2</sup> Stage 2 is equivalent to RIBA Stage E/F, which is a costed detailed design

## DESIGN, BUILD, FINANCE AND MANAGE (DBFM) PROJECT - NEW SECONDARY SCHOOL

**Reporting Period:** March 2016 to June 2016

### Overview

A review of the School Estate has taken place to determine the likely impact of anticipated population growth on the School Estate in the medium to long term. One of the priorities for the Council has been agreed as a new secondary school on the northern perimeter of Perth. The school will accommodate 1,100 pupils.

HubCo Design, Build, Finance and Manage (DBFM) procurement for the secondary element is mandatory as part of the funding terms and conditions.

### Sources of Funding

£32.5 million will be provided through the Scottish Futures Trust (SFT).

### Progress Update

The SFT Pre-New Project Request (NPR) Key Stage Review is complete. The NPR was issued to HubCo in June 2015 and accepted at the beginning of July 2015.

The procurement process, for the design and construction of the school, is complete and Robertson Construction has been selected as the Tier 1 Consultants (Main Contractor). The Tier 2 Consultants selected comprise of, Archial Norr (Architects), Wallace Whittle (Mechanical & Electrical) and Goodsons (Civil & Structural).

Lifelong Learning Committee, on 4 November 2015 ([Report No. 15/515 refers](#)), approved the establishment of a new secondary school on a preferred site at Bertha Park, Perth, from August 2019 and the arrangements to establish a new catchment area for the school and transfer arrangements for primary pupils.

A new programme is being developed for the construction of the new secondary school based on the revised opening date.

A legal agreement was signed on 29 January 2016 securing the land required for the new secondary school.

Stage 1 has been received and is being analysed with acceptance expected in June 2016.

### Key Milestones

Milestone	Planned date	Actual Date	Forecast date
Options to Populate School	October 2013	May 2014	
Proposal for Statutory Consultation	August 2014	June 2014	
Submit NPR	October 2014	June 2014	
Submit Final NPR	April 2015	June 2015	
Statutory Consultation Complete	May 2015	November 2015	

<b>Milestone</b>	<b>Planned date</b>	<b>Actual Date</b>	<b>Forecast date</b>
<b>Land Secured</b>	January 2016	January 2016	
<b>Stage 1 Agreed</b>	January 2016		June 2016
<b>Planning Application Submitted</b>	September 2016		September 2016
<b>Planning Application Agreed</b>	November 2016		November 2016
<b>Stage 2 Agreed</b>	September 2017		September 2017
<b>Utilities Completed</b>	October 2017		October 2017
<b>Financial Close</b>	October 2017		October 2017
<b>Site Start</b>	October 2017		October 2017
<b>Access Road from Ruthvenfield Road into Bertha Park Completed</b>	November 2017		April 2018
<b>School Operational</b>	August 2019		August 2019
<b>Completion of External Works</b>	August 2019		August 2019

The above milestones are an indicative HubCo Programme and will require to be confirmed.

### **Current Issues**

- There is a heavy dependence on having infrastructure in place, in particular the utilities. Progress has been made with a verbal agreement for the delivery of the utilities by the Developer.
- Revenue funding for this project will be required. This funding has been identified as a pressure in the medium term financial plan approved by Council on 8 October 2014 ([Report No. 14/433 refers](#)).

## ERROL PRIMARY SCHOOL – EXTENSION

**Reporting Period: March 2016 to June 2016**

### Overview

This project is currently being taken forward to address capacity issues at Errol Primary School. Land was previously procured adjacent to the school in March 2011 in order to facilitate expansion. Demolition works were concluded on the additional land in 2012.

The scope of the works will provide 3 additional classrooms, increased nursery provision and specialist provision for Additional Support Needs (ASN) together with associated ancillary space. The project will also include scope for a further 2 classrooms and a small hall to be added to the building in the future should the need arise. The 2 additional classrooms and hall are not likely to be required in the short to medium term i.e. in the next 10 years.

### Sources of Funding

This project will be funded by the ECS Composite Capital Programme and Developer Contributions. The current project budget is £3,317,000.

### Progress Update

On 25 February 2015 planning permission was granted for the project. Listed building consent was granted on 19 March 2015. Work started on site in July 2015 and is progressing in line with the programme.

The Statutory Consultation for specialist provision for ASN was approved by the Lifelong Learning Committee on 26 August 2015 ([Report No. 15/332 refers](#)).

### Key Milestones

Milestone	Planned date	Actual Date	Forecast date
Concept Design	March 2014	March 2014	
User Reference Group	June 2014	June 2014	
Gross Maximum Cost Agreed (GMC1)	September 2015	June 2015	
Site Start	October 2015	July 2015	
Committee Approval ASN Consultation Process	August 2015	August 2015	
Gross Maximum Cost Agreed (GMC2)	August 2015	September 2015	
School Operational	August 2016		August 2016
Full ASN Provision Available	September 2016		September 2016
Completion of External Works	July 2016		September 2016

## INCHTURE PRIMARY SCHOOL – SYNTHETIC PITCH

**Reporting Period:** March 2016 to June 2016

### Overview

Following engagement with the Inchtire Community Sports Committee (ICSC), the proposed Multi Use Games Area (MUGA) will be developed as a synthetic pitch facility. This will be jointly funded by PKC and the ICSC.

### Sources of Funding

Education and Children's Service's contribution to the MUGA element of the project is £91,000. The community are contributing £112,000 to the synthetic pitch for construction and ongoing maintenance.

### Progress Update

A Community Capacity Building worker is working with the ICSC and the wider community to develop operational arrangements outwith school hours for the synthetic pitch when it is complete.

Agreement has been reached with the ICSC for a synthetic all weather facility. Planning permission is expected mid-June 2016 with construction beginning during the school summer holidays.

### Key Milestones

<b>Milestone</b>	<b>Planned Date</b>	<b>Actual Date</b>	<b>Forecast Date</b>
<b>Planning Application Granted</b>	October 2015		June 2016
<b>Construction Begins</b>	January 2015		June 2016
<b>Construction Complete</b>	April 2015		August 2016

## KINROSS PRIMARY SCHOOL - REPLACEMENT

**Reporting Period: March 2016 to June 2016**

### Overview

On 29 October 2014, Lifelong Learning Committee ([Report No 14/467 refers](#)) approved the replacement of Kinross Primary School. This project is to replace the existing buildings with a new 18 class primary school on the playing field of the current site. This will be delivered by HubCo with Robertson Construction appointed as the main contractor.

### Sources of Funding

The Strategic Policy & Resources Executive Sub-Committee, on 30 July 2015, approved to fully fund Kinross Primary School from the Council's existing Composite Capital Budget on a Design, Build and Development Agreement (DBDA) (Capital) to ensure the delivery dates are met. The budget is currently £12,215,000 and will be reviewed when detailed costs are received. Developers contributions are also available should they be required.

### Progress Update

The planning application for the new school was lodged in March 2016.

To allow for sufficient resourcing for the completion of Kinross and Tulloch Primary Schools an indicative staggered programme has been developed.

### Key Milestones

Milestone	Planned date	Actual Date	Forecast date
Submit Final NPR	April 2015	June 2015	
HubCo Accept NPR Stage 1 Commences	April 2015	July 2015	
Stage 1 Agreed	October 2015	December 2015	
Planning Application Submitted	February 2016	March 2016	
Planning Application Agreed	June 2016		June 2016
Stage 2 Agreed	September 2016		August 2016
Financial Close	October 2016		August 2016
Site Start	October 2016		October 2016
School Operational	December 2017		December 2017
Demolition and Completion of External Works	April 2018		February 2018

The above milestones are an indicative HubCo Programme and will require to be confirmed at the end of Stage 2.

## PERTH ACADEMY – SPORTS HALL

**Reporting Period:** March 2016 to June 2016

### Overview

The sports hall will cost in excess of the remaining sports provision budget. It is anticipated that the balance will come from the Modernising Secondaries Programme from monies allocated to Perth Academy, subject to Strategic Policy & Resources Committee approval.

### Sources of Funding

The funding is from the ECS Composite Capital Programme.

### Progress Update

The project has been placed on hold whilst a review of all the outstanding works required at Perth Academy is assessed. A decision will be made following the Capital Budget setting process in June as to which works will proceed at the school.

### Key Milestones

<b>Milestone</b>	<b>Planned date</b>	<b>Actual Date</b>	<b>Forecast date</b>
<b>Feasibility Study Completed</b>	August 2013	January 2014	
<b>Review of Feasibility Study</b>	April 2014	September 2014	
<b>Review of Costed Feasibility Study including Changing</b>	May 2015	September 2015	
<b>School Approval of Affordable Design</b>	October 2015	November 2015	
<b>Gross Maximum Cost Agreed</b>	September 2016		TBC
<b>Site Start</b>	October 2016		TBC
<b>Sports Hall Operational</b>	August 2017		TBC
<b>Completion of External Works</b>	August 2017		TBC



## TULLOCH PRIMARY SCHOOL - REPLACEMENT

**Reporting Period: March 2016 to June 2016**

### Overview

On 29 October 2014, Lifelong Learning Committee ([Report No. 14/467 refers](#)) approved the replacement of Tulloch Primary School. This project is to replace the existing building with a new 14 classroom primary school on the playing field of the current site. This will be delivered by HubCo with Robertson Construction appointed as the main contractor.

### Sources of Funding

The Strategic Policy & Resources Executive Sub-Committee, on 30 July 2015, approved to fully fund the Tulloch Primary School project from the Council's existing Composite Capital Budget on a Design, Build and Development Agreement (DBDA) (Capital) to ensure the delivery dates are met. The budget is currently £10,487,000 and will be reviewed when detailed costs are received. Developers contributions are also available should they be required.

### Progress Update

The planning application for the new school was lodged in March 2016.

To allow for sufficient resourcing for the completion of Kinross and Tulloch Primary Schools a indicative staggered programme has been developed. This alters the completion date for Tulloch Primary School to January 2018 from December 2017.

### Key Milestones

Milestone	Planned date	Actual Date	Forecast date
Submit Final NPR	April 2015	June 2015	
HubCo Accept NPR Stage 1 Commences	April 2015	July 2015	
Stage 1 Agreed	October 2015	November 2015	
Planning Application Submitted	February 2016	March 2016	
Planning Application Agreed	June 2016		June 2016
Stage 2 Agreed	September 2016		October 2016
Financial Close	October 2016		November 2016
Site Start	October 2016		December 2016
School Operational	December 2017		January 2018
Completion of External Works	April 2018		April 2018

The above milestones are an indicative HubCo Programme and will require to be confirmed.