

PERTH AND KINROSS COUNCIL

Lifelong Learning Committee

3 November 2021

LEARNING ESTATE STRATEGY AND LEARNING ESTATE MANAGEMENT PLAN

**Report by Executive Director (Education and Children's Services)
(Report No. 21/202)**

PURPOSE OF REPORT

This report seeks the approval of the Perth and Kinross Learning Estate Strategy which is attached as Appendix 1. This updated Strategy follows the launch of the Scottish Government's Learning Estate Strategy. Approval is also sought for the Learning Estate Management Plan (LEMP) (Appendix 2).

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 has invested £81m since 2015/2016 and between 2021 and 2029, the Council (PKC) will invest a further £160m in the Learning Estate.
- 1.2 It is important, in light of the significant investment and cost 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.
- 1.3 The Council's most recent School Estate Strategy was approved by this committee in 2012 and was aligned to the Scottish Government's strategy "Building Better Schools: Investing in Scotland's Future".

Scotland's Learning Estate Strategy

- 1.4 The Scottish Government, COSLA and other partners have co-produced a new strategy "[Scotland's Learning Estate Strategy: Connecting People, Places and Learning](#)".
- 1.5 This new strategy has been published in the context of the refreshed National Performance Framework. The Strategy emphasises that quality education and its associated infrastructure is key to delivering many of the national outcomes which will provide 'opportunities for all of Scotland to flourish'. The Strategy details the specific national outcomes to which it primarily relates as:
 - We grow up loved, safe and respected;
 - We are well educated, skilled and able to contribute to society;
 - We are healthy and active;
 - We live in communities that are inclusive, empowered, resilient and safe;

- We have thriving and innovative businesses with quality jobs and fair work for everyone; and
 - We have a globally competitive, entrepreneurial, inclusive and sustainable economy.
- 1.6 The vision of the national strategy is ‘a Learning Estate which supports Excellence and Equity for all’.
- 1.7 The new national Learning Estate Strategy is for colleges and universities as well as schools and early learning and childcare (ELC). There is also an aspiration that other wider public sector estate strategies should link to this strategy.
- 1.8 The Strategy expects that organisations responsible for estates strategies, and in particular, Learning Estates strategies, will consider the key objectives and guiding principles of the national strategy. It is expected that the principles set out in the national strategy will be used to shape the future context of joined up investment planning and prioritisation across the Learning Estate and localities.
- 1.9 The principles detailed in the national strategy are as follows:
- Learning environments should support and facilitate excellent joined up learning and teaching to meet the needs of all learners;
 - Learning environments should support the wellbeing of all learners, meet varying needs to support inclusion and support transitions for all learners;
 - The Learning Estate should be well-managed and maintained, making the best of existing resources, maximising occupancy and representing and delivering best value;
 - The condition and suitability of learning environments should support and enhance their function;
 - Learning environments should serve the wider community, and where appropriate, be integrated with the delivery of other public services in line with the place principle;
 - Learning environments should be greener, more sustainable, allow safe and accessible routes and be digitally enabled;
 - Outdoor learning, and the use of outdoor learning environments, should be maximised;
 - Good consultation about learning environments, direct engagement with learners and communities about their needs and experiences, and an involvement in decision making processes should lead to better outcomes for all;
 - Collaboration across the Learning Estate, and collaboration with partners in localities, should support maximising its full potential; and
 - Investment in Scotland’s Learning Estate should contribute towards improving learning outcomes and support sustainable and inclusive economic growth.

Developing the Perth and Kinross Learning Estate Strategy

- 1.10 A new PKC Learning Estate Strategy (Appendix 1) has been developed which considers the management and development of the Learning Estate within the context of the new national strategy.

- 1.11 The current PKC School Estate Strategy is delivered by officers and teams throughout the Council with support from other organisations in the private and public sector. The starting point for the new PKC Learning Estate Strategy, therefore, was a series of meetings held with colleagues across the Council. The objectives of the meetings were to:
- Scan the environment to consider the context in which the Strategy will be delivered;
 - Consider to what extent we already deliver the 10 principles detailed in 1.9; and
 - Identify opportunities for improvement.
- 1.12 Secondary school Headteachers and primary school Headteachers were consulted on the Strategy through the Secondary Headteachers Executive Group and the Primary Headteachers Executive Group.
- 1.13 In developing the strategy, consideration was given to other Councils' plans and strategies, and in particular, engagement took place with officers from Aberdeenshire Council, Angus Council, Clackmannanshire Council and Dundee City Council.

2. PROPOSALS

Perth and Kinross Council Learning Estate Strategy

- 2.1 The attached Learning Estate Strategy (Appendix 1) reflects information gathered through the process detailed above. An overview of how Perth and Kinross currently delivers on each principle is contained in the Strategy. Case studies are also provided to evidence the practical outcomes of the work that is taking place.
- 2.2 Overall, there are significant synergies between how the Council currently develops and manages the Learning Estate and the principles in the new national Learning Estate Strategy.
- 2.3 The Learning Estate Strategy aligns with and complements the Council's recently approved Investment Blueprint and 30-year Investment Plan. Representing approximately 80% of the Council's property estate, the Learning Estate Strategy will help to inform development of the Council's Corporate Property Asset Management Strategy which will set out the future strategy direction for all Council owned property assets.
- 2.4 However, in considering the principles, it has also been possible to identify opportunities for improvement. The commitments which the strategy proposes are:
- We will encourage a place-based collaborative, consultative approach to our management of the Learning Estate;
 - We will revise our plans for the Learning Estate based on the Council's '30-year Blueprint for Investment';

- We will manage and develop the Learning Estate to progress towards low carbon targets; and
- We will increase our focus on outdoor learning environments when managing and developing the Learning Estate.

2.5 The strategy details actions which will be taken in order to deliver these commitments. Some of the key actions are:

- We will use our Capital Prioritisation Framework to develop plans for investment beyond the current 10-year Capital Programme, taking into account any place-based priorities;
- We will consider how we can manage the Learning Estate in line with the Perth and Kinross Offer and as part of the Council's 30-year Capital Investment Blueprint;
- We will work with Learning Estate users to encourage behavioural change which supports low carbon targets;
- We will increase pupil participation in development of the learning environment in lines with the principles of the United Nations Convention on the Rights of the Child (UNCRC); and
- We will review outdoor learning facilities and develop a programme for improvement.

The Learning Estate Management Plan (2021)

2.6 The Learning Estate Strategy will be delivered through the LEMP which is supported by the Capital Programme. The LEMP is attached as Appendix 2 of this report. The LEMP is a working document which will be revised every three years.

2.7 The LEMP gives an overview of the Learning Estate, which consists of 70 primary schools, 11 secondary schools, 1 stand-alone nursery and 1 additional support needs (ASN) school. Condition, suitability and sufficiency of each establishment is detailed within the LEMP.

2.8 The LEMP puts forward proposals to change the capacity of 4 schools:

School	Current Capacity	Proposed Revised Capacity	Reason for change
Coupar Angus Primary School	333	269	Expansion of nursery for 1140 hours and inclusion of specialist ASN provision which utilised available classroom spaces. The school roll at Census 2020 was 142 pupils, operating from 7 classes. The current capacity of 333 is based on 11 classes and the proposed revised capacity of 269 is based on 9 classes.

School	Current Capacity	Proposed Revised Capacity	Reason for change
Dunbarney Primary School	207	232	The capacity of 207 is based on 7 classes and the proposed revised capacity of 232 is based on 8 classes. The school has been operating from 8 classes since school session 2012/13. The planning capacity has not changed to date as the school roll has not exceeded the capacity of 207.
Newhill Primary School	423	456	The capacity of 423 is based on 14 classes and the proposed revised capacity of 456 is based on 15 classes. The school has been operating from 15 classes since school session 2017/2018 as part of working capacity arrangements. The planning capacity has not changed to date as the school roll has not exceeded the capacity of 423. There are 7 general purpose spaces across the campus and Scottish Government guidance suggests 3 general purpose spaces would be required as a minimum.
St Ninians Episcopal Primary School	150	99	The capacity of 150 is based on 6 classes and the proposed revised capacity of 99 is based on 4 classes. The addition of a nursery for the expansion to 1140 hours for ELC has utilised available classroom space to support a sustainable school roll for the school.

2.9 There are a number of areas, detailed in the LEMP, which are driving the investment in the Learning Estate. These are:

- The School Estate Transformation Programme which considers condition, suitability and occupancy/sufficiency; and
- Life Expired Buildings.

In addition to these core prioritisation factors; other areas will also drive the prioritisation of projects. These are:

- Accessibility/ASN;
- Digital Learning;
- ELC;
- Energy Efficiency and Low Carbon;
- Locality Planning/Local Place Plans;
- Outdoor Learning;
- The Corporate Capital Investment Blueprint; and
- Universal Free School Meals.

2.10 Information on progress of the School Estate Transformation Programme, the ELC Capital Programme and the Learning Estate Capital Investment Programme is detailed in the LEMP.

2.11 A PESTLE analysis, which is detailed in the LEMP, considers the political, economic, social, technical, legal and environmental influences on the Learning Estate. Among the key areas for consideration are:

Category	Drivers
Political	<ul style="list-style-type: none"> • 30-year blueprint for Scotland's infrastructure • Scottish Government Learning Estate Investment Plan • Council's Investment Blueprint and 30-year Investment Plan • After school and holiday care • Gaelic Medium Education • Additional Support for Learning (ASL) Review
Economic	<ul style="list-style-type: none"> • Increased demand on the construction industry • Tender price inflation
Social	<ul style="list-style-type: none"> • The Perth and Kinross Offer • Population change
Technical	<ul style="list-style-type: none"> • Digital Strategy • Construction Quality • Revised Building Standard Regulations • Council's Interim Climate Emergency Report • Net Zero Low Carbon Building Standard
Legal	<ul style="list-style-type: none"> • The Education (Scotland) Act 2016 • The Community Empowerment (Scotland) Act 2015 • United Nations Convention on the Rights of the Child
Environmental	<ul style="list-style-type: none"> • Protecting Scotland's Future: The Government's Programme for Scotland 2019-2020 – net zero carbon targets • COVID-19 measures

2.12 One of the key areas linked to the Perth and Kinross Offer is the Investment Blueprint for the Future, which was approved by Council on 6 October 2021 ([Report No. 21/180 refers](#)). The Blueprint is intended to help the Council identify future investment priorities and to establish a more transparent and flexible approach to investment decision making, ensuring that capital investment fits with delivery of the Perth and Kinross Offer and is responsive to the changing needs within our communities.

2.13 The LEMP includes the actions detailed in paragraphs 2.4 and 2.5. In addition, it details ongoing actions which will be delivered through the Transformation Programme, Capital Programme and Asset Management.

Some of these key actions are as follows:

- A Statutory Consultation to develop a catchment area for the new primary school at Bertha Park;
- A capital project to build a new primary school at Bertha Park by summer 2026;
- A replacement building for Perth High School on the current site;

- A new school to replace Balhousie Primary and North Muirton Primary will be built on the site of North Muirton Primary School, with an estimated completion date of Easter 2023;
- Replacement of Blairgowrie Recreation Centre, with an estimated completion date of November 2023;
- Audio Video (AV) and Wi-Fi upgrades throughout the estate to facilitate the Digital Strategy;
- Energy savings/climate change measures in school buildings; and
- A review of the Perth City Secondary Estate.

3. CONCLUSION AND RECOMMENDATIONS

- 3.1 The PKC Learning Estate Strategy recognises the importance of the Learning Estate in delivering some of the primary objectives of the Council and the Scottish Government.
- 3.2 The strategy details the overall strategic context of the Strategy, how we currently deliver on the principles of the national Learning Estate Strategy and our way forward in terms of improvement actions.
- 3.3 The Learning Estate Strategy provides a framework through which PKC can aspire to have a Learning Estate which enhances learning and makes a difference to communities.
- 3.4 The strategy will be delivered by the LEMP and supported by the Capital Programme. The LEMP will be adapted to support delivery of the Perth and Kinross Offer as part of the Council's 30-year Capital Investment Blueprint.

It is recommended that the Committee:

- (i) Notes that the management of the Learning Estate in Perth and Kinross aligns well with the national Learning Estate Strategy;
- (ii) Notes 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) Approves the Perth and Kinross Learning Estate Strategy attached as Appendix 1;
- (iv) Approves the Perth and Kinross Learning Estate Management Plan (LEMP) attached as Appendix 2; and
- (v) Approves the revised capacities in paragraph 2.8 of this report which are detailed in the LEMP, attached as Appendix 2.

Authors

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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	Yes
Strategic Environmental Assessment	Yes
Sustainability (community, economic, environmental)	Yes
Legal and Governance	Yes
Risk	Yes
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 no financial implications other than those noted in the reports.

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 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.

- 3.1.1 The information contained within this report has been considered under the Corporate Equalities Impact Assessment process (EqIA) with the following Outcome: 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 Although the Strategy itself does not meet the requirements of the Act for further assessment as it will not lead to development, in the interest of good practice a SEA pre-screening exercise has been carried out. The pre-screening process determined that no further action is required.

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 and Governance Services has been consulted in the preparation of this report.
- 3.5 N/A

Risk

- 3.6 The key risks for the LEMP are detailed in the LEMP.

4. Consultation

Internal

- 4.1 The Executive Officer team, Corporate Strategic Investment and Improvement Board (SIIB), Head of Property Services, Secondary Headteachers Executive Group and the Primary Headteachers Executive Group have been consulted in the preparation of this report. Officers from all Services who support management and development of the Learning Estate Strategy and Management Plan have also been consulted and contributed the reports.

External

- 4.2 As per the main report benchmarking took place with other Local Authorities.

5. Communication

- 5.1 Communications plans are in place for the School Estate Transformation Programme and the Capital Programme which form the basis of the Learning Estate Management Plan.

2. 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.

3. APPENDICES

- 3.1 Appendix 1 – PKC ECS Learning Estate Strategy November 2021
Appendix 2 – ECS Learning Estate Management Plan November 2021