

EAST AYRSHIRE COUNCIL

CABINET – 14 JANUARY 2009

SCHOOL ESTATE MANAGEMENT PLAN 2008

Report by Executive Director of Educational and Social Services

1. PURPOSE OF REPORT

- 1.1 The purpose of this report is to seek Cabinet approval of the 2008 School Estate Management Strategy and its submission to the Scottish Government.

2. BACKGROUND

- 2.1 Local authorities are required to submit annual School Estate Management Plans (SEMP) to the Scottish Government. Initial plans asked local authorities to detail the state of the existing school estate, their vision for the estate, the required capital investment to meet this vision and timescales within which this vision would be reached.
- 2.2 Scottish Government guidelines require a full SEM to be completed every 5 years with a summary document produced annually.
- 2.3 The original SEM required by the Government in 2005 highlighted that investment of £98 million was required to meet the Council's vision for schools and set a timescale of 15 years for this vision to be met. If the schools involved in the Council's PPP schools are removed from the capital figures the need is estimated to reduce to £70 million. However this requires significant planned investment to ensure that buildings are maintained and improved and do not suffer further deterioration.
- 2.4 Cabinet will note that the Scottish Government have specifically requested this information for primary, secondary and special schools only and that the investment requirements excludes all Early Years and Community Learning establishments.

3. SCHOOL ESTATE MANAGEMENT PLAN 2008

- 3.1 The Schools Estate Management Strategy is attached to this report. In summary the document:-
- restates the Council's vision for the school estate;
 - provides an update on 2007/08 capital programme works of;
 - Identifies future investment planned to fulfil the commitments of the Better Schools Better Learning – A Strategy for Developing the School Estate;and
 - sets out how the Council can achieve its desired standards for the school estate.
- 3.2 It is made clear in the Schools Estate Management Plan that presently there remains a significant surplus capacity in schools. This should require future

action by the Department of Educational and Social Services, to ensure the continued viability of existing schools in the face of a declining requirement for pupil places. Surplus capacity demands expensive maintenance revenue costs and for heat and light, and other resources and therefore restricts the flexibility available to deal with other priority estates related matters.

4. FINANCIAL / LEGAL IMPLICATIONS

4.1 The investment required in school buildings is set out in paragraph 2.3 of this report and is estimated to be £70 million.

5. COMMUNITY PLAN IMPLICATIONS

5.1 The 2008 SEMP is designed to support the Council's Community Plan by :-

- Improving community learning;
- Improving opportunities;
- Improving health; and
- Improving the environment

6. RECOMMENDATIONS

It is recommended that Members of the Cabinet:-

- (i) approve the 2008 School Estate Management Plan;
- (ii) agree to its submission to the Scottish Government;
- (iii) ask the Executive Director of Educational and Social Services to produce future reports on the School Estate Management Plan as necessary to Cabinet, and
- (iv) otherwise note the contents of this report.

Graham Short
Executive Director of Educational and Social Services

8 December 2008
RG/JBS

LIST OF BACKGROUND PAPERS

Policy and Resources Committee - Capital Programme 2007/08

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East Ayrshire --- **COUNCIL**

Department of Educational and Social Services

Schools Estate Management Strategy

September 2008

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1. INTRODUCTION

1.1 The Community Plan and Council's Vision Statement

The Community Plan is the Council's overarching policy document and sets 6 key themes around which the Council and its Community Planning Partners deliver services to the citizens of East Ayrshire :-

- Eliminate poverty;
- Improve community health;
- Improve community learning;
- Improve health;
- Improve the environment; and
- Improving opportunities.

The Community Planning partners have developed the following vision:-

“East Ayrshire Council will be a place with strong, vibrant communities where everyone has a good quality of life and access to opportunities, choices and high quality services which are sustainable, accessible and meet people’s needs”.

This vision is supported by the Education Committee which has approved the following vision statement for Education Services:-

“The Department of Educational and Social Services is committed to:-

- **providing a choice;**
- **maximising opportunity for all;**
- **developing the potential of individuals; and**
- **meeting needs through inclusion”**

The Council is also committed to providing services which match its key values of quality, equality, access and partnership.

This statement covers every aspect of the Department's work including the management and development of educational establishments. Previous School Estate Management Plans highlighted the development and improvement in the fabric of school buildings as a key component in the facilitation of the learning and teaching process. The Council believes this will significantly contribute to meeting the themes of the Community Plan.

1.2 Previous School Estate Management Plans have outlined the 4 key themes of priority to be considered when improving our educational facilities:-

- reducing surplus capacity;
- addressing maintenance issues;
- meeting statutory requirements of DDA legislation; and
- improving property flexibility.

We continue to invest significant resources into our school buildings in a prioritised manner, recognising the long term nature of the modernisation work. We do, however, remain committed to achieving a school estate which will provide positive opportunities for learning and teaching.

Our ***Building Learning Communities*** – School PPP project has seen the creation of four outstanding educational facilities at Grange, Mauchline, Shortlees and St Joseph's. The seven schools involved are equipped with the latest technology to deliver the curriculum and also provide excellent facilities for use by the wider community.

In addition to the PPP schools, the new Galston Primary and Nursery School, was opened in August to staff and pupils at a total cost of £9.3m. This exciting new facility incorporates a large number of green and energy efficient measures; extended IT facilities and external teaching areas. A two classroom extension at Dunlop Primary was completed in May 2008 and a further three classroom extension to Stewarton Academy is due for completion in October 2008.

Use of the Council's own capital programme and the School Fund has seen significant investment in all of our non PPP secondary and primary schools.

We constantly strive to improve the facilities in which teachers and pupils work and learn. This ensures that buildings can meet the needs of the formal curriculum and adapt to accommodate the flexibility which is required. Our long term vision is to constantly improve the service offered to all learners, regardless of age, and this will allow the citizens and staff of East Ayrshire meet the challenges and opportunities of the 21st Century.

Graham Short
Executive Director of Educational and Social Services

2. UPDATE

2.1 Introduction

The Council has previously identified its long term themes for improving the school estate, which have been restated in section 1.2 above. The SEMP identifies the following criteria to be assessed before investment or rationalisation decisions are taken :-

- school capacity;
- current and projected school rolls;
- running costs;
- required capital investment;
- changes to the curriculum;
- suitability for curriculum delivery; and
- wider community requirements

2.2 The School Estate, School Capacity and Pupil Rolls

The school estate in East Ayrshire has the following establishments :-

- 11 nursery schools;
- 18 nursery classes within primary schools
- 5 family centres (including two which are part of a primary school and managed by the Head Teacher);
- 45 primary schools;
- 9 secondary schools; and
- 4 special schools.

From the last census date of September 2007 there are 5726 available spaces in primary and 1907 in secondary. As previously reported the school pupil population is expected to fall to 16,915 by 2011. It is therefore evident that further rationalisation of space is required. The Council will continue to examine the methods by which excess capacity can be reduced.

In the knowledge of a falling population and requirement for school places, forward looking and imaginative options which secure the future of existing school buildings become significant.

When considering rationalisation of spaces the Council is committed to providing high quality local service delivery to support the communities of East Ayrshire. Previous Estate Plans have detailed how schools can be successfully adapted to accommodate office and support staff who are not directly involved in the learning and teaching process. The Council takes consideration of the following when determining investment priorities:-

- future roll projections;
- the needs of local communities;
- the current and likely future needs of the curriculum; and
- cost / benefit analysis of spending proposals.

2.3 Work Undertaken in 2007/08

Work undertaken in 2007/08 has improved many aspects of the school estate and is summarised below.

Window Replacement Programmes

In the course of 2007/08 approximately £550,000 of the Council's capital programme was spent on continuing the window replacement programme in primary and secondary schools. Under the prudential Framework a number of establishments will continue to benefit from this work in 2008/09

Use of the School Fund has also seen £545,000 invested in window replacement. This funding was allocated to both secondary and primary schools.

Electrical Upgrades

During 2007/08 approximately £1.1m was spent upgrading the electrical infrastructure at 1 secondary and 5 primary schools. Besides improving the electrical systems within the schools this work will also ensure that increased the use of ICT can be used in curriculum delivery.

A further £225,000 was spent in upgrading the power supply to two secondary schools to facilitate future infrastructure upgrades.

Boiler Replacement

In 2007/08 the Council committed £250,000 to renew boiler plant within two primary schools. This investment has seen the installation of high efficiency boiler plant which will reduce both running costs and consumption.

Staff / Pupil Facilities

During 2007/08 the Council has spent approximately £600,000 on improving facilities to enhance the fabric of school buildings. This investment covered a number of areas including :-

- upgrades of fire alarms;
- improvements to general classrooms;
- refurbishment of hygiene facilities;
- installation of CCTV
- re-roofing projects; and
- asbestos removal

2.4 External Comment

HMIE

A key action following the HMIE inspection report of the Education function of the local authority 2006 was to continue to improve the school estate. This is also reflected in the Audit of Best Value and Community Planning undertaken by the Accounts Commission in 2006.

External Audit

The Council's External Auditor has also commented on the need to continue investment in the school estate. The Council has agreed that all major investment decisions follow PRINCE2 project management methodology.

3. SCHOOL ESTATE – FUTURE WORK

3.1 Council Vision for the School Estate

The Council set out its vision for the school estate in the original PPP Business Case submitted to the Scottish Executive. This vision has been restated in previous SEMP's and incorporates the following :-

- to meet the ethos of inclusion;
- to be safe and welcoming places for both students and staff;
- to be able to deliver a 21st Century curriculum;
- to be environmentally sound; and
- to provide enhanced community use.

It is by evaluating the criteria set out in section 2.1 above that investment decisions are made and by which the Council will improve the fabric of schools.

3.2 The Council's Capital Investment Strategy

The Council's Capital Investment Strategy provides a framework for capital investment with projects aligned to the Council's asset management aspirations. It indicates how capital investment contribute to the achievement of the Council's key objectives and priorities, how resources will be allocated across service demands, and encourages cross service strategies. The key objectives of the strategy are therefore to:

- Ensure that investment proposals draw on robust consultation, option appraisal and transparency in prioritisation
- Facilitate joint and cross-service working

- Establish a clear framework for managing and monitoring the capital programme aligned with the principles of Best Value
- Demonstrate and communicate to stakeholders through effective reporting the performance of both on-going and completed schemes

The Council seeks to implement an appropriate mix of capital investment solutions that will enable key objectives to be met and ensure that its scarce capital resources are focussed on the provision of assets deemed to deliver the most efficient, effective and economic approach.

Education and Schools

Substantial funding allocations have been identified over the next five year to recognise the need to invest in educational establishments to ensure the council delivers on the aims of the Better Schools : Better Learning – A Strategy for Developing the School Estate.

These projects are in addition to allocations to provide two new schools. In the planning of new schools, recognition is given to the need to provide future facilities that improve educational opportunities for social inclusion, sustainable development and equal opportunities. In practical terms any new investment will therefore reflect the changing pattern of population, ensuring our schools are based in the right location with accommodation and facilities fit to serve the needs of all learners in the twenty first century.

The five year General Services Capital Programme also take cognisance of obligations to continually invest in the existing property portfolio, and is prepared in collaboration with the Department of Finance and Asset Management.

3.3 Better Schools : Better Learning

The East Ayrshire Better Schools : Better Learning Programme was a formal consultation initiated to address issues identified within SEMP by rationalising school accommodation, addressing under capacity and improving the schools estate to provide schools fit for a 21st century education.

The results of the consultation exercise launched in November 2007 were presented to and approved by the Council in March 2008. This initiative will see a further investment in excess of £20 million into the Schools Estate over the next 5 years and will include the:-

- Merger of Witchhill and Woodstock Special Schools in a new state of the art facility on a new site
- Merger of Cairnhill and Castle Primary Schools into the Castle Primary site following major refurbishment work and extension
- Co-Location of St Xavier's Primary School to Patna Primary
- Refurbishment of Sorn and Littlemill Primary Schools

3.4 Preferred Option Strategy

The SEMP identifies the following options as the preferred route to meet the vision for the school estate:-

- Continue to reduce surplus capacity;
- Continue the improvements in the school building stock;
- Continue to invest in improving accessibility to schools; and
- Continue improvements in building stock to stimulate wider community use.

These themes underpin all investment proposals for the school estate.

3.5 Resource Allocation

There are 5 primary sources of funds that are used to meet the vision and preferred option strategy for the school estate. These are:-

- Education Capital Programme;
- School Fund Programme
- Central Repairs Account (CRA) Capital Programme;
- Revenue Saving to Fund Prudential Framework Investment; and
- PPP.

Education / CRA Capital Programmes

The Council's resources are allocated to projects in a prioritised manner. The introduction of an asset management database has facilitated the collection and analysis of sophisticated property data. This allows informed decisions to be taken when allocating funds to specific schools or projects.

Recognising the magnitude of the required investment prioritisation is necessary. The methodology used is to assess the criticality of building components and the criteria set out in section 2.1.

All funding allocations have been scrutinised and approved by Cabinet. The work will continue the following themes:-

- Electrical upgrades;
- Boiler plant replacement;
- Window replacement programmes;
- General classroom refurbishment;
- Practical subject room upgrades; and
- Building security
- Accessibility

School Fund

The Scottish Government provided funding of £3.61m during 2007/08. This funding was predominantly used to continue major improvement works in the non PPP secondary schools. In line with guidance from the Scottish Government the Council is pursuing:-

- Improvements to the fabric of school buildings;
- Alterations to buildings to meet the requirements of class sizes in s1 and s2 English and Mathematics from August 2007; and
- Improvements to ICT infrastructure and use of ICT in the delivery of the curriculum.
-

Revenue Savings and the Prudential Framework

Under the Prudential Framework revenue savings can be utilised to fund capital investment. Officers are presently examining ways of generating savings which can then be used to augment present investment levels. All recommendations which arise from this exercise will require approval by the Council's Cabinet.

The Executive Head of Finance has confirmed that revenue savings of £70,000 per annum can finance investment of £1 million.

PPP

Financial close was achieved in July 2006, with construction at the four project sites commencing immediately thereafter. The initial investment of £76 million resulted in two new build secondary schools, three primary schools and a special school, with a refurbished and extended primary school.

The Scottish Government have confirmed revenue support of £4.3 million per annum for the lifetime of the contract. The Council will contribute the remainder of the Unitary Charge through:-

- current revenue running costs of the schools involved;
- savings from staffing as a result of rationalisation;
- central contribution from CRA funds; and
- a Council commitment to underwrite any further funding gap.

Two primary school sites were handed to the Council for opening in October 2007, with the two campus sites to handed over in April and September 2008.

3.6 Timetable

The 2005 SEMP set out a timescale of 15 years to achieve the Council's vision for the school estate. This time is consistent with current resource allocations, although the level of any revenue savings which are used to support capital borrowing may shorten the time period.

3.7 Communication Strategy

The Council values highly its communication with internal and external stakeholders, which HMIE have previously provided very positive comments in this regard. All investment decisions are taken after liaison with school staff and school councils. A strong example of this is the level of Elected Member and officer consultation with pupils, parents and community groups for the PPP project.

The Council actively promotes:-

- Elected Member and officer visits to schools
- Meetings with individual school councils;
- Discussion of property matters at Head Teacher meetings;
- Full and open public consultation on school estate management issues;
- Distribution of the annual SEMP document to Head Teachers and Chairs of School Councils;
- Liaison with Community Planning partners to promote increasingly integrated working;
- Officer attendance at Community Councils; and
- Discussion of property matters at Pupil Council meetings.

Through these steps the Council is keen to promote further stakeholder involvement in the improvement of the school estate.