

**FALKIRK COUNCIL**

**Subject: SCHOOL ESTATE MANAGEMENT PLAN - PROGRESS UPDATE**  
**Meeting: EDUCATION EXECUTIVE**  
**Date: 29 OCTOBER 2013**  
**Author: ACTING JOINT DIRECTOR OF EDUCATION**

**1. INTRODUCTION**

- 1.1 This is the latest report to members on progress made during 2012/13 on the School Estate Management Plan.
- 1.2 The purpose of the report is to highlight improvements made across the school estate and summarises:
- Major works carried out in financial year 2012/13.
  - The work planned for 2013/14.
  - Assessment of the current estate, including the condition, suitability and sufficiency ratings of each school.

**2. BACKGROUND**

- 2.1 The School Estate Management Plan (SEMP) is reviewed and updated by the Education Services Property Team annually and is submitted to the Scottish Government together with the annual 'Core Facts' data collection exercise which assesses the condition, suitability and capacity of each property in the school estate.

**3. PURPOSE OF THE SCHOOL ESTATE MANAGEMENT PLAN**

- 3.1 The SEMP is a key strategic document which supports the council's Corporate Asset Plan to secure best value and demonstrate sound management of the education school property portfolio.
- 3.2 Education Services use the SEMP and in particular the 'core facts' information (provided to the Scottish Government) to plan and prioritise resources and investment in our schools up to 5 years ahead. This information facilitates comparative strategic analysis of the estate and provides a basis for further detailed examination of the need for specific building projects along with informing investment priorities.

#### 4. EXISTING ASSETS

4.1 Education Services have 113 properties across the council which can be categorised as follows:

Primary Schools	50
Secondary Schools	8
Special Schools	4
Nursery Schools	<u>8</u>
<b>Sub-Total - schools</b>	<b>70</b>
Storage Facilities	2
Offices	2
Community Education Centres & Bases	13
Community Wings	4
Community Halls	<u>22</u>
<b>Overall Total</b>	<b><u>113</u></b>

#### 5. FUNDING

5.1 In the last 5 years, investment in Falkirk's school estate has amounted to:

- over £36m through the council's Capital Programme
- over £100m by providing 4 new secondary schools (NPDO)
- over £6m through the Revenue Repairs and Maintenance Programme.

5.2 Falkirk Council's current approved three year capital programme includes significant and sustained investment in our school estate. **Appendix 1** shows the current approved plan for capital investment. The plan shows approved, prioritised investment prepared by Education Services using the data and information held on the school estate to prioritise projects.

5.3 **Appendix 2A** shows major projects completed in 2012/13 **Appendix 2B** shows the type of major project work planned for 2013/14 for the School Fund and Health and Safety budgets respectively.

5.4 Over and above the current capital investment funded by the Council there are a number of potential major school investment projects that have either been agreed or are under discussion to be wholly funded by housing developers. The major projects currently under discussion are also shown in **Appendix 2B**.

5.5 In addition to the above capital investment, Falkirk's school estate also benefits from revenue investment. In 2013/14, a repairs and maintenance budget of £1.1m ensures that the undernoted work is undertaken in a prioritised and structured manner:

- statutory and pre-planned maintenance (re legionella testing, asbestos checks and fixed wire testing)
- upkeep of fixed plant
- general repairs.

This work is included in individual School Asset Management Plans.

## 6. INDIVIDUAL SCHOOL ASSET MANAGEMENT PLANS

- 6.1 The SEMP assesses the condition, suitability and sufficiency of the school estate and how each of these areas impact on individual properties.
- 6.2 The format of the individual school Asset Management Plans (AMPs) provide key stakeholders such as headteachers and Parent Councils with a clearer understanding of the elements which comprise the condition survey together with identifying future proposed expenditure for each establishment in a focused and transparent manner. The current process and format enables stakeholders to be consulted on an annual basis.
- 6.3 Each school AMP contains a proposed 5 year investment summary. It is important to note, however, that the investment summary is not a list of what will be done at the school but a list of what Education Services would like to do subject to the availability of resources with projects prioritised in accordance with the condition and suitability ratings.

In addition, there will be a central list of 'Reserve Projects' which can be brought forward if there is slippage to those projects shown in our Asset Management Plans.

It should be noted that some projects may need to be re-scheduled to future years if there are works that need to be carried out as an emergency to ensure that facilities can remain operational.

- 6.4 The individual school AMPs allow headteachers some flexibility over how they would like to prioritise the non statutory planned work. Education Services will always try to accommodate re-prioritisation requests where resources allow and there is a rationale for doing so.

## 7. CORE FACTS

- 7.1 Core facts data has been compiled, recorded and reported to the Scottish Government on an annual basis since 2003. This information helps set out the elements which will establish a baseline picture of the current school estate and provides a method of measuring the benefits of long-term investment

The three main elements of the core facts collected for each individual school are:

- Condition - focuses on the physical state of premises to ensure safe and continuous operation
- Suitability - focuses on the quality of premises to meet curriculum, management and other issues which may impact on raising educational standards
- Sufficiency - focuses on the capacity and organisation of pupil places within and across schools in relation to demand

The condition and suitability elements collected for schools are based on a four point scale A (Good); B (Satisfactory); C (Poor); and D (Bad).

A summary of our current 2013 primary, secondary and special school estate's condition and suitability ratings is as follows:

Rating (2013)	Condition	Suitability
A	31	17
B	25	40
C*	7	6
D	<u>0</u>	<u>0</u>
<b>Total Schools Rated</b>	<b><u>63</u></b>	<b><u>63</u></b>

**\*Note:**

These ratings were produced prior to the merger of Falkirk Day Unit and Educational Assessment unit to form the new Mariner Support Service, both were rated as C for Condition and Suitability prior to their merger. The new service has yet to be assessed.

The above ratings are used to prioritise and align both capital and revenue expenditure/ investment in schools with the key aim of improving our C and B ratings and maintaining our A ratings across all our school estate.

## 7.2 Condition Ratings

Development Services annually update the condition survey information taking cognisance of work undertaken in previous years and they also re-survey every school on a 5 year cycle, Falkirk Council Education Services use a weighting and scoring system for the condition assessment of its schools to ensure consistency regarding the importance of the 12 major elements on which the assessment is based.

Following the completion of this exercise, 7 schools received a 'C' (poor) rating. Discussions have taken place with Development Services Facilities Team and work has been identified which should elevate these schools to a minimum 'B' (satisfactory) rating. These works are:

- California Primary School - External render and roof works
- Carronshore Primary School - Roof and glazing upgrade
- Grange Primary School - Hall Atrium roof reglazing
- Kinneil Primary School - General improvements
- Limerigg Primary School - External render repairs and resurfacing works
- Falkirk Day Unit/Educational Assessment Unit - Amalgamation of these two units

## 7.3 Suitability Ratings

The suitability Core Fact tries to provide a measure of the extent to which a schools building and grounds are appropriate in providing an environment which supports quality learning and teaching. The latest suitability data collection exercise used a revised questionnaire form was issued to all headteachers based on the Scottish Government's model. This sought to seek headteachers opinions on the existing suitability of their school building and environs, focusing on:

<u>Area</u>	<u>Weighting</u>
Learning and Teaching	50%
Internal Social space	15%
Internal Facilities	15%
External Social space	10%
External Facilities	<u>10%</u>
	<u>100%</u>

While an annual suitability return is required, the decision was previously taken to review Falkirk schools suitability ratings every three years or following extensive alterations/ refurbishments etc.

### Moderation Exercise

A moderation exercise is an important aspect of the data gathering process. Officers meet with headteachers to discuss their ratings/views to try and ensure a robust and consistent return across the authority.

Following the completion of this exercise a series of independent review visits were organised and carried out for all schools that initially returned a 'C' rating. These visits consisted of a review of the layout of the school and in the majority of cases, a meeting with the headteacher to discuss/identify potential short term and long term improvements that could be made which would enhance the suitability of the schools.

These improvements would then be factored into the future schools AMPs.

Following the moderations visits only 6 schools were given a C rating. These are:

<u>School</u>	<u>Improvement Work Planned</u>
Bainsford Primary School	Discussions with Headteacher/Development Services to agree solution
Shieldhill Primary School	Discussions with Headteacher/Development Services to agree solution
St Joseph's Primary School	Proposed extension planned for 2014/15
Larbert High School	Conversion of 2 classrooms in Carrongrange School into drama studios. Conversion of old drama studio into gymnasium. Provision of external PE changing accommodation. Planned creation of a bike/bump track
Falkirk Day Unit Education Assessment Unit	} Amalgamation planned

**Note:** A detailed breakdown of all current ratings is included as **Appendix 3**.

## 7.4 Sufficiency Ratings

A key objective for the school estate is to ensure that the authority has enough capacity/ pupil places for the resident population. An assessment of sufficiency provides Education Services with a means to determine the occupancy/capacity levels of its schools and assists with:

- Forward Planning of School investment
- Projecting occupancy figures using school roll projections to identify schools/areas at risk of:
  - Exceeding capacity
  - Long term under occupancy
- Anticipating and calculating the impact of new housing to secure where appropriate planning gain/developer contributions
- Determine robust and sustainable enrolment levels/thresholds that can be clearly justified in appeals against placing request refusals.

The current school rolls, capacity and occupancy rates are detailed in **Appendix 4**.

## **8. PROCESS FOR IDENTIFYING AND PRIORITISING INVESTMENT IN THE SCHOOL ESTATE USING THE CORE FACTS DATA**

- 8.1 The council has over the last 5 years significantly improved its school estate and enhanced learning environments through progressing the objectives established within the School Estate Management Plan (SEMP). **Appendix 3** demonstrates this by showing the current condition and suitability ratings of schools.
- 8.2 The core fact information in relation to condition and suitability has now become more robust and technically efficient. This provides Education Services with an excellent basis for prioritising and informing investment decisions in the school estate.
- 8.3 The development and review of the School Estate Management Plan (SEMP) and individual School Asset Management Plans (AMPs) will continue to be an ongoing commitment for Education Services.
- 8.4 Education Services will report to members, via the Information Bulletin, the major works that have been completed at the end of each term. In addition a summary of all major works carried out across the School Estate will be reported annually to Education Committee, as an integral and important part of the Services annual review of its SEMP.
- 8.5 A copy of both the Service School Estate Management Plan (SEMP) and all Schools Asset Management Plans have also been made available in the Members lounge for access by Elected Members. This information is provided in Ward order.

## **9. RECOMMENDATIONS**

### **9.1 Education Committee is invited to:**

- (i) Note the progress made in the implementation of the School Estate Management Plan (SEMP).
- (ii) Note the current condition, suitability and sufficiency ratings.
- (iii) Instruct the Director of Education Services to continue the process of implementation, monitoring and review of the plan.

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**Joint Acting Director of Education**  
**Date:**

Contact Officer: Alan Livingstone, ext 6620

### **LIST OF BACKGROUND PAPERS**

- Building Better Schools: Investing in Scotland's Future (Scottish Government/COSLA 2009)
- Falkirk Council School Estate Management Plan (Summary and Progress Update at 30 September 2013)

**Falkirk Council : Education Services**  
**Approved 3 Year Capital Programme 2013-16**

	2013/14 £000	2014/15 £000	2015/16 £000	Totals £000
<b>Education Investment</b>				
<b>Major Improvements</b>				
New Carrongrange School	0	0	6,000	6,000
Antonine PS - Extension	1,480	620	0	2,100
St Joseph's PS - Extension	47	546	222	815
Wallacestone – Traffic works	72	0	0	72
Ladeside PS - Extension	0	0	50	50
<b>Other Investment</b>				
Capital Improvements	3,892	2,050	2,050	7,992
Community Education Properties	190	185	185	560
<b>IT Investment</b>				
IT Investment (Estates Equipment)	140	140	140	420
IT Investment (Curricular Equipment)	200	600	510	1,310
<b>TOTAL EDUCATION</b>	<b>6,021</b>	<b>4,141</b>	<b>9,157</b>	<b>19,319</b>

Notes to above

**NEW CARRONGRANGE SCHOOL**

- Additional High School facility part funded by Scottish Futures Trust.
- Costs and resources are phased over 2015/16 and 2016/17.

**ANTONINE PS – EXTENSION**

- Permanent extension to replace current mobile accommodation

**St JOSEPH'S PS - EXTENSION**

- Permanent extension to replace current mobile accommodation

**WALLACESTONE PS - TRAFIC WORKS**

- Completion of road traffic management works following recent school extension.

**LADESIDE PS – EXTENSION**

- Preparation work for future permanent extension to replace current mobile accommodation.
- Costs and resources are included for 2016/17 and 2017/18

**CAPITAL IMPROVEMENTS – ALL SCHOOLS**

- Allocation to cover Works Capital across the schools estate to address condition surveys, capacity issues health and safety, etc.

**COMMUNITY EDUCATION ALL PROPERTIES**

- Rolling programme provision to address essential building condition upgrades

**IT INVESTMENT (ESTATES & CURRICULAR EQUIPMENT)**

- Rolling programme provision for IT equipment and IT infrastructure

## Falkirk Council : Education Services

## 2012/13 Capital Expenditure – Major Projects Completed

The major works carried out across the school estate are detailed below:

**Work £100k+**

- St Bernadette's Primary School (£8m)
- Wallacestone Primary School – Rewire (£0.45m)
- Westquarter Primary School – Extension/Refurbishment (£0.55m)
- St Andrew's Primary School – Nursery/Primary drop off areas and car park improvements (£0.175m)

**Work £50k to £100k**

- Bowhouse Primary School – External render works (£54,000)
- Greenpark Community Centre – Windows upgrade and asbestos removal (£0.100m)
- Larbert Village Primary School – Double Mobile Enhanced Provision (£85,000)
- Shieldhill Primary School – Roof over clad (£75,000)
- St Margaret's Primary School – Convert previous Nursery to Classrooms (£85,000)
- Wallacestone Primary School – Car park extension (preparation for the additional nursery mobile) (£100,000)
- Weedings Hall, Education Assessment Unit – Installation of two temporary modular classrooms to accommodate pupils from Mariner Support Services while refurbishment work is carried out. (£50,000)

In addition a number of other schools had significant work carried out between £10,000 and £50,000:

- Airth Primary School – Fencing replacement
- Bankier Primary School – Resurfacing Works
- Beancross Primary School – Nursery Toilet Extension
- Blackness Primary School – Mobile Extension fabric repairs
- Bo'ness Public Primary School – Roof Upgrade
- Carronshore Primary School – Roof Upgrade
- Drumbowie Primary School – Felt roof and glazing upgrade
- Grange Primary School – Replacement of felt roofing and internal repairs
- Head of Muir Primary School – Toilet Upgrade
- Inchlair Nursery School – Felt roof, ceilings, lighting and switchgear replacement
- Ladeside Primary School – Resurfacing works
- Maddiston Primary School – Acoustic Improvements
- Moray Primary School – Mobile Alterations
- Nethermain Primary School – Replacement of external fascias, windows and renders
- Queen Street Nursery School – Resurfacing Works
- Slamannan Primary School – Roofing and ceiling replacements
- St Andrew's Primary School – New Nursery Play Area



## Falkirk Council : Education Services

<b>Major Planned Capital Expenditure - School Fund Budget 2013/14 (£1.1m)</b>
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**Type of Improvement Work Planned**

Playground resurfacing works  
 External render works and heating control installation  
 Roof upgrade  
 Demolition works  
 Toilet upgrades  
 Replace felt roof coverings, ceilings, lighting and switchgear replacement  
 Replace fascias, windows and render  
 Internal upgrade works  
 Roof over clad and steelwork painting  
 Car park extensions & resurfacing work  
 Electrical re-wire/heating upgrade  
 Boiler replacement

<b>Major Planned Capital Expenditure - Health and Safety Budget 2012/13 (£0.3m)</b>
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**Type of Improvement Work Planned**

Boundary wall replacement and stone repairs to building  
 Repairs to roof/towers  
 Dampness remedial works (main building) and floor repairs  
 Resurfacing works  
 Replace wall with fence and door upgrade  
 Firemaster requirements  
 Finger guards  
 Nursery Environmental Health issues  
 Asbestos works  
 Legionella works  
 Intruder alarm upgrades

<b>Capital Expenditure Plans - New Schools/School Extensions</b> <b>Funded by Housing Developers</b>
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**Agreed Projects****Projects Currently Under Discussion**

Whitecross Primary School - New 2 Stream School  
 Head of Muir Primary School - New Extension  
 Bankier Primary School - New Extension  
 Bantaskin Primary School – New Extension  
 Denny Primary School – New Extension

## APPENDIX 3

### Falkirk Council : Education Services

#### Core Facts Summary - Condition/Suitability Ratings 2013

Primary Schools	Condition	Suitability
Airth Primary School	A	B
Antonine Primary School	B	B
Avonbridge Primary School	B	B
Bainsford Primary School	B	C
Bankier Primary School	A	B
Bantaskin Primary School	A	B
Beancross Primary School	B	B
Blackness Primary School	A	B
Bo'ness Public Primary School	B	B
Bonnybridge Primary School	B	B
Bothkennar Primary School	B	B
Bowhouse Primary School	A	B
California Primary School	C	B
Carmuir Primary School	B	A
Carron Primary School	B	B
Carronshore Primary School	C	B
Comely Park Primary School	A	A
Deanburn Primary School	B	A
Denny Primary School	A	B
Drumbowie Primary School	B	B
Dunipace Primary School	A	B
Easter Carmuir Primary	B	B
Grange Primary School	C	B
Hallglen Primary School	A	A
Head Of Muir Primary School	B	B
Kinnaird Primary School	A	A
Kinneil Primary School	C	B
Ladeside Primary School	A	B
Langlees Primary School	B	B
Larbert Village Primary School	A	B
Laurieston Primary School	B	A
Limerigg Primary School	C	B
Maddiston Primary School	A	A
Moray Primary School	B	A
Nethermains Primary School	A	B
Sacred Heart RC Primary School	A	B
Shieldhill Primary School	A	C
Slamannan Primary School	B	A
St Andrew's RC Primary School	B	B
St Bernadette's RC Primary School	A	A
St Francis Xavier's RC Primary School	A	A
St Joseph's RC Primary School	A	C
St Margaret's Primary School	B	B
St Mary's RC Primary School	B	B
St Patrick's RC Primary School	B	B

No of Schools	
Primary	50
Secondary	8
Special	5
<b>Total</b>	<b>63</b>

Suitability Ratings 2013	%
A - 17	27
B - 40	63
C - 6	10
D - 0	0
<b>Total</b>	<b>100</b>

Condition Ratings 2013	%
A - 31	49
B - 25	40
C - 7	11
D - 0	0
<b>Total</b>	<b>100</b>

Stenhousemuir Primary School	B	B
Victoria Primary School	B	A
Wallacestone Primary School	A	B
Westquarter Primary School	A	B
Whitecross Primary School	B	B

## Falkirk Council : Education Services

### Core Facts Summary - Condition/Suitability Ratings 2013

Secondary Schools	Condition	Suitability
Bo'ness Academy	A	A
Braes High School	A	B
Denny High School	A	A
Falkirk High School	A	A
Graeme High School	A	B
Grangemouth High School	A	A
Larbert High School	B	C
St Mungo's RC High School	A	A

Special Schools	Condition	Suitability
Carrongrange School	A	B
Windsor Park School	A	B
Falkirk Day Unit*	C	C
Education Assessment Unit*	C	C
Oxgang School and Support Service	A	B

**Notes:** The Scottish Government do not require assessments of Nursery Schools as part of the Core Facts submission.

Falkirk Day Unit and the Educational Assessment unit have now merged to form the Mariner Support Service which is yet to be assessed on either condition or suitability.

## 2013 School Roll/Capacity Details

Primary Schools	School Roll 2013/14	School Capacity	Occupancy %
Airth	158	217	73
Antonine	258	262	98
Avonbridge	42	100	42
Bainsford	201	262	77
Bankier	183	284	64
Bantaskin	326	434	75
Beancross	309	342	90
Blackness	33	50	66
Bo'ness Public	240	317	76
Bonnybridge	305	342	89
Bothkennar	27	50	54
Bowhouse	306	434	71
California	74	100	74
Carmuir	159	217	73
Carron	373	434	86
Carronshore	311	454	69
Comely Park	413	434	95
Deanburn	316	434	73
Denny	217	284	76
Drumbowie	17	50	34
Dunipace	171	217	79
Easter Carmuir	175	262	67
Grange	166	262	63
Hallglen	305	434	70
Head of Muir	324	434	75
Kinnaird	421	434	<b>97</b>
Kinneil	217	434	50
Ladeside	289	284	<b>102</b>
Langlees	215	262	82
Larbert Village	339	434	78
Laurieston	205	237	86
Limerigg	31	50	62
Maddiston	399	434	92
Moray	365	496	74
Nethermains	183	262	70
Sacred Heart	194	342	57
Shieldhill	208	342	61
Slamannan	140	262	53
St Andrew's	407	434	94
St Bernadette's	139	217	64
St Francis's	427	454	94
St Joseph's	167	150	<b>111</b>
St Margaret's	392	434	90
St Mary's	195	317	62
St Patrick's	314	434	72
Stenhousemuir	381	434	88
Victoria	343	434	79
Wallacestone	492	651	76
Westquarter	197	262	75
Whitecross	69	100	69
<b>Total</b>	<b>12138</b>	<b>15704</b>	<b>77</b>

<b>Secondary Schools</b>	<b>School Roll 2013/14</b>	<b>School Capacity</b>	<b>Occupancy %</b>
Bo'ness Academy	632	1152	55
Braes HS	982	1123	87
Denny HS	1293	1663	78
Falkirk HS	1022	1548	66
Graeme HS	1018	1462	70
Grangemouth HS	740	1166	63
Larbert HS	1718	1872	92
St Mungo's HS	1320	1433	92
<b>Total</b>	<b>8725</b>	<b>11419</b>	<b>76</b>

**Note:** 1. School (building) capacity does not include temporary modular classrooms hence why the occupancy levels shown can exceed 100%.  
2. Some high occupancy schools rely on these temporary structures to manage demand for places.

