

OPTIONS APPRAISAL – FORTEVIOT PRIMARY SCHOOL

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

PURPOSE OF REPORT

This report seeks approval of the recommendation of the Options Appraisal (Appendix A) which has been undertaken in respect of Forteviot Primary School. Lifelong Learning Committee is asked to agree that the Executive Director (Education and Children’s Services) commence statutory consultation on a proposal to close Forteviot Primary School.

1. BACKGROUND

School Estate Transformation

- 1.1 The school estate is a significant and valuable asset to the communities of Perth and Kinross. Between 2017 and 2023, the Council will invest £141m in the school estate, including a number of new or replacement primary schools and a substantial upgrade programme for secondary schools. In addition the Scottish Government is funding a new £32.5m secondary school at Bertha Park.
- 1.2 The School Estate Strategy ([Report No. 12/370 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 cost associated with the school 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 school estate over the coming years. These include changing demographics including population growth and movement, house building in certain locations, ongoing deterioration in building infrastructure, pressure on planned maintenance budgets, increasing revenue costs and the expansion of Early Learning and Childcare from 600 to 1140 hours.

- 1.5 The Council's Transformation Strategy 2015-2020 'Building Ambition' and Organisational Development Framework were approved by Council on 1 July 2015 ([Report No. 15/292 refers](#)). Together they detail how Perth and Kinross Council 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.
- 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:
- (i) schools should have an occupancy rate where possible greater than 60% of the capacity and ideally should be operating at over 80% capacity;
 - (ii) every school should be rated as A or B ie at least satisfactory for condition and suitability; and
 - (iii) life expired buildings¹ within the school estate should be prioritised for replacement.
- 1.7 On 2 November 2016, Lifelong Learning Committee ([Report 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 Forteviot Primary School was included in the schools to be considered by an options appraisal as a result of being under-occupied at Census² 2015. The school had 14 pupils and an occupancy level of 28% at this time.
- 1.9 On 24 October 2016, prior to the options appraisal commencing, Forteviot Primary School was officially mothballed with the agreement of parents of pupils attending Forteviot Primary School. This means the operation of the school was suspended with pupils being educated at Forgandenny Primary School.

Key Legislation

- 1.10 Councils, as Education Authorities, have a statutory duty in terms of the Education (Scotland) Act 1980 to make adequate and efficient provision of school education across their entire area for the current school population and future pattern of demand.
- 1.11 Councils also have a statutory responsibility in terms of the Local Government in Scotland Act 2003 to achieve best value.

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

² An annual pupil census in publicly funded schools in Scotland is carried out every year for publication by the Scottish Government. This usually takes place in September.

- 1.12 The Schools Consultation (Scotland) Act 2010 provides a strong, accountable statutory consultation process that local authorities must apply to their handling of all proposals for school closures and other major changes to schools. These consultation processes are expected to be robust, open, transparent and fair, and seen to be so. They are also expected to be consistent across Scotland.

The 2010 Act makes special arrangements in relation to rural schools, establishing a presumption against closure of rural schools. The result of this is that education authorities must have special regard to a number of factors before formulating a proposal to close a rural school and in consulting on and reaching a decision as to whether to implement a rural school closure proposal. These factors are:

- Effect on the Community
- Effect on Travel Arrangements
- Educational Benefits

2. OPTIONS APPRAISAL

- 2.1 An options appraisal has been undertaken to consider the future of Forteviot Primary School. The options appraisal is attached as Appendix A.
- 2.2 The options appraisal considered the under-occupancy of Forteviot Primary School, which had 14 pupils and an occupancy level of 28% at Census 2015. The roll decreased further and there were 5 pupils at the school at Census 2016. The roll had fallen due to a decreasing number of children living in the catchment but also due to pupils choosing to attend other primary schools in the area.
- 2.3 The Scottish Government’s Rural School List 2017 classifies Forteviot Primary School as an “accessible rural” school under Section 14 of the Schools (Consultation) (Scotland) Act 2010. Therefore in considering the options the rural school factors detailed in paragraph 1.12 were explored fully in the Options Appraisal.
- 2.4 The findings contained within the Options Appraisal conclude that the only reasonable option is to close Forteviot Primary School because the school roll is not sustainable. None of the other options looked at were considered to be reasonable alternatives to closure, for the reasons set out in the Options Appraisal. These are summarised below:

	Option Description	Outcome
Option 1	The school remains open but continue with mothballing of Forteviot Primary School – pupils attend Forgandenny Primary School	Rejected. Not a reasonable option. No prospect of a sustainable roll in the school in the next 3-4 years due to small numbers of pre-school children.

Option 2	Consider closing school – pupils attend Forgandenny Primary School	Accepted as a reasonable option
Option 3	Consider closing school – pupils attend alternative primary school to Forgandenny Primary School	Rejected. Not a reasonable option. Dunning Primary School does not have capacity for Forteviot Primary School pupils. Other neighbouring schools would increase travel time for pupils.
Option 4	Catchment area is reviewed to determine whether this would increase the school roll sufficiently to ensure the future sustainability of the school	Rejected. Not a reasonable option due to the inability to create a sustainable catchment which does not put pupils in other catchments at detriment through travel distance

2.5 Although option 2, if implemented, could result in the closure of Forteviot Primary School, this option would support the future of Forgandenny Primary School, which is also a small rural school, by increasing the size of its catchment area. Pupils from Forteviot Primary School and Forgandenny Primary School have benefitted from close relationships for some time and this will lessen the impact of change. Recurring savings of £155,755 per annum would support the wider delivery of education across Perth and Kinross.

2.6 Closing the school is the most appropriate response to the falling roll for the reasons outlined in the Options Appraisal. If implemented, pupils would be transferred to Forgandenny Primary School. The delineated area of Forgandenny Primary School would be extended to subsume the whole catchment of Forteviot Primary School.

3. PROPOSALS

3.1 It is therefore proposed to formally embark upon a statutory consultation in relation to the closure of Forteviot Primary School.

3.2 This would be undertaken in terms of the Schools (Consultation) (Scotland) Act 2010.

3.3 A formal Proposal Paper, based on the options appraisal will be prepared for publication.

3.4 A public meeting will be undertaken by the Convener of the Lifelong Learning Committee and the Executive Director (Education and Children's Services), supported by officers from Education and Children's Services.

3.5 Following this, a report will be submitted to a future Lifelong Learning Committee detailing the outcome of the statutory consultation.

4. CONCLUSION AND RECOMMENDATIONS

- 4.1 Following the preparation of a comprehensive Options Appraisal, it is proposed that a formal consultation in relation to the closure of Forteviot Primary School should take place.
- 4.2 It is recommended that the Committee:
- (i) Approves the recommendation of the Options Appraisal that a statutory consultation in relation to the closure of Forteviot Primary School should take place;
 - (ii) Instructs the Executive Director (Education and Children's Services) to prepare and publish a proposal paper to close Forteviot Primary School, transfer pupils to Forgandenny Primary School and extend the delineated area of Forgandenny Primary School to subsume the whole catchment area of Forteviot Primary School;
 - (iii) Instructs the Executive Director (Education and Children's Services) to formally consult the appropriate bodies and persons on the terms of the proposal paper, all in terms of the Schools (Consultation) (Scotland) Act 2010;
 - (iv) Delegates authority to the Executive Director (Education and Children's Services) to investigate and manage any alleged omissions or inaccuracies during the consultation process and to take appropriate action in accordance with The Schools (Consultation) (Scotland) Act 2010; and
 - (v) Instructs the Executive Director (Education and Children's Services) to prepare a report on the results of the consultation and report back to the Committee on the outcome of the consultation at a future meeting of the Lifelong Learning Committee.

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

Workforce

- 2.2 As a result of this report there will be workforce implications for several teams across Council Services which include ECS Resource Management, ECS Business Services, ECS Finance, Human Resources and Legal and Governance Services.

As part of the statutory consultation there is a requirement to consult with staff affected by the proposal.

Asset Management (land, property, IT)

- 2.3 There are no direct asset management implications arising from this report at this point. Asset management implications will not be known until the statutory consultation is complete.

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 An Equalities Impact Assessment will be completed as part of the statutory consultation.

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 The environmental impact of each option is considered in the options appraisal; however there are no implications at this stage of the process. The environmental impact will be considered further through the statutory consultation.

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.

- 3.3.1 There is no direct impact on sustainability as a result of this report, and sustainability will be considered further as part of the statutory consultation process.

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

Risk

- 3.5 A risk log is being maintained for the School Estate Transformation Programme. A further risk log will be created for as part of the statutory consultation process.

4. Consultation

Internal

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

External

- 4.2 The Options Appraisal details the consultation which has been carried out in the development of this report.

5. Communication

- 5.1 A communication plan has been prepared which will support effective communication and engagement with stakeholders, and to promote the anticipated efficiencies and benefits of this Transformation Project as well as the links to the wider Transformation Programme. A range of methods will be used to consult with internal and external stakeholders as identified in the draft communication plan, such as meetings, briefings, community

consultation and focus groups. A separate communications plan will be developed for the Statutory Consultation process.

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 - Options Appraisal Report – Forteviot Primary School