

PERTH AND KINROSS COUNCIL

Lifelong Learning Committee

24 January 2018

OPTIONS APPRAISAL – BALHOUSIE PRIMARY SCHOOL AND NORTH
MUIRTON PRIMARY SCHOOL

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

PURPOSE OF REPORT

This report seeks approval for the replacement of North Muirton Primary School.

It also seeks approval of the recommendation of the Options Appraisal (Appendix A) which has been undertaken in respect of Balhousie Primary School and North Muirton Primary School, which is to close Balhousie Primary School and transfer pupils to the new North Muirton Primary School once it has been built.

Lifelong Learning Committee is asked to agree that the Executive Director (Education and Children's Services) commence statutory consultation on this proposal.

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.

There is funding of £16m in the Composite Capital Budget 2017/23 for a replacement primary school in the 'North' of Perth.

- 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 hours 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 Balhousie Primary School was included in the schools to be considered by an options appraisal due to the condition and suitability rating of the school. The occupancy of the school was also low.
- 1.9 North Muirton Primary School was included in the schools to be considered by an options appraisal due to the condition rating of the 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.

- 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.

2. OPTIONS APPRAISAL

- 2.1 An options appraisal has been undertaken to consider the future of Balhousie Primary School and North Muirton Primary School. The options appraisal is attached as Appendix A.

- 2.2 The options appraisals for Balhousie Primary School and North Muirton Primary School have been combined because there is funding of £16m in the Composite Capital Budget 2017/23 for a replacement primary school in the 'North' of Perth.

The options appraisal considers whether there are opportunities for both schools, which have adjoining boundaries, to benefit jointly or separately from the funding in the capital programme.

The options appraisal considered the condition and suitability of Balhousie Primary School and the low occupancy. The school had 113 pupils and an occupancy level of 50% at Census 2015². The roll and occupancy remained the same at Census 2016. The roll fell to 101 and the occupancy to 45% at Census 2017. The roll has fallen due to pupils choosing to attend other primary schools in the area.

- 2.3 The options appraisal considered the condition of North Muirton Primary School, which is rated 'C' (Poor – showing major defects and/or not operating adequately). The options appraisal confirms that the replacement of North Muirton Primary School is required and is feasible. It is not feasible to replace Balhousie Primary School for the reasons set out in the options appraisal. The capital funding for 'Perth North' should therefore be used to replace North Muirton Primary School.

- 2.4 The findings contained within the Options Appraisal conclude that the only reasonable option is to close Balhousie Primary School.

If implemented, pupils would be transferred to a new North Muirton Primary School once it has been built.

This option will provide well designed, accessible, modern teaching spaces which would benefit both Balhousie Primary School and North Muirton Primary School pupils and families. The cost of the new school would be approximately £4.4m less than the cost of building a new school at North

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. Pupil roll forms part of the census

Muirton and refurbishing Balhousie Primary School. Revenue savings of £253,471 will also be made.

This option would provide best value for Council, allowing it to invest the capital and revenue saved into improving other school buildings and supporting the wider delivery of education services, while providing a better learning and teaching environment for over 300 school pupils.

None of the other options looked at were considered to be reasonable alternatives to closure, for the reasons set out in the Options Appraisal.

3. PROPOSALS

- 3.1 It is therefore proposed to formally embark upon a statutory consultation to close Balhousie Primary School, transfer pupils to a new North Muirton Primary School once it has been built and extend the delineated area of North Muirton Primary School to subsume the whole catchment area of Balhousie Primary School.

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

- 3.2 A formal Proposal Paper, based on the options appraisal will be prepared for publication.
- 3.3 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.
- 3.4 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 Balhousie Primary School should take place.
- 4.2 It is recommended that the Committee:
- (i) Approves the replacement of North Muirton Primary School using the funding in the Composite Capital Programme 2017/23 for a replacement primary school in the North of Perth;
 - (ii) Approves the recommendation of the Options Appraisal that a statutory consultation in relation to the closure of Balhousie Primary School should take place;
 - (iii) Instructs the Executive Director (Education and Children's Services) to prepare and publish a proposal paper to close Balhousie Primary School, transfer pupils to a new North Muirton Primary School once it has been built and extend the delineated area of North Muirton Primary

School to subsume the whole catchment area of Balhousie Primary School;

- (iv) 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;
- (v) 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
- (vi) 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.

Author(s)

Name	Designation	Contact Details
Carol Taylor	Service Manager (Resource Management)	ECSCCommittee@pkc.gov.uk 01738 475000
Gareth Findlay	ECS Project Officer - Transformation	

Approved

Name	Designation	Date
Sheena Devlin	Executive Director (Education and Children’s Services)	11 January 2018

If you or someone you know would like a copy of this document in another language or format, (on occasion, only a summary of the document will be provided in translation), this can be arranged by contacting the Customer Service Centre on 01738 475000.

You can also send us a text message on 07824 498145.

All Council Services can offer a telephone translation facility.

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 and Corporate Asset Management Team Leader 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

Appendix A – Options Appraisal Balhousie Primary School and North Muirton Primary School