

From: Martin Finnigan [martin@calecon.com]
Sent: 11 April 2013 10:54
To: Nick Goodchild
Cc: Derek Sharkey
Subject: Strategic Support for School Estate Review

Dear Nick,

Thanks for taking the time to talk on Tuesday. As discussed the purpose of this email is to help

form a specification for a programme of support from ourselves/hub north, and propose areas in

which we can help the council carry out a robust, open and fair strategic review of options for the

development of the school estate within the time constraints you have indicated. I have

structured this email as follows:

1. Principles we apply in carrying out reviews of this nature;
2. Activities we would see as essential components of the review;
3. Activities we would see as contributing to a robust, open and fair process, but which could be carried out by us or the Council;
4. An indication of costs.

PRINCIPLES:

* Child-centred approach - Communities are understandably protective of their local

schools and frequently resist changes to the status quo. The approach we advocate is

unashamedly pupil centred: we seek to gauge the costs and benefits of options to the

child, not just to the council;

* The role of Head Teachers - School staff, and especially head teachers are well placed

to comment on the viability and reasonableness of ideas and options in the local context.

They are also often highly influential individuals within their communities. We give them a key role;

* An open process - The process should be open. It must be explained clearly from the

outset what process will be, what options are being considered, how they will be compared, and how decisions will be made. There should be no work going on 'under the

radar' , nor a pre-determined 'hit list'. Communities must be kept informed of progress

and given the chance to comment and to suggest additional options for consideration;

* Consider all viable options - All viable options should be brought to the surface and

considered. This is a requirement of the legislation in the context of rural schools, and is

clearly good practice and common sense.

ESSENTIAL ACTIVITIES:

* Keeping people informed - Parents and communities must be kept informed from the

outset. This would typically be by means of a letter(s) and perhaps a press release from

the Council. If you wish, we can help with design, printing and distribution of newsletters and can host social media activities (Facebook, Twitter, blog etc);

* School visits. We would wish to visit each school and spend time with each HT to build

an understanding of the school, its local issues, relationship with the community, reasons

for placings requests etc, and to give staff the chance to put forward options and ideas.

It is important that every school is visited so that all are seen to be given equal treatment

and consideration;

* Initial list of Options and Red Lines - Generation of an initial list of options and ideas.

This list would include any locations which, by dint of their remoteness or seclusion, would always require educational provision to be available locally so long as demand existed;

At this stage, it would be possible for us to carry out a desk top exercise which compares the

options against the child-centred criteria structure we have applied elsewhere in Scotland to

identify preferred options for each ASG. We feel, however, that this misses an opportunity to

guarantee and demonstrate transparency by further engaging with the HT's from all of

the schools including those likely to be affected and our preference is to hold Head Teacher

workshops as explained below under 'Other Activities'. Indeed the Head Teacher workshops are

in a sense the Key Stage in the process as they subject all of the options, data and assumptions to

the most rigorous scrutiny.

OTHER ACTIVITIES:

* Communications support - As indicated above, we have found that good communications with communities and parents are important. The Council may prefer to

keep all or part of this in-house, but if required we can support communications in a range

of ways using traditional and new/social media channels. We can also host online surveys

and feedback questionnaires which can be quick and cost-effective;

* Head Teacher Workshop(s) - We have found that working with Head Teachers in a

workshop setting helps strengthen the findings, and adds robustness and transparency to

the process. During such a workshop (or series of workshops, perhaps up to one per ASG

depending on the number/nature of options that emerge), the local HT's would review our

'template' set of evaluation criteria to ensure that they reflect local issues, and then carry

out a weighting/scoring exercise to identify preferred options. The 'collective knowledge

and professional experience' of the HT's will make the findings very robust indeed and

will be a sound foundation for the Educational Benefits Statements required for any future statutory consultation;

* Stakeholder Dialogue – We have found that liaison with local councillors in the first

instance and thereafter parent groups, youth groups, and community groups helps ensure

that all local issues are brought to the surface and reflected in the options appraisal process. It helps build confidence on all sides that the process is a fair and open one, and

it helps ensure that all reasonable and viable options are considered. For this reason we

are keen to include briefings for these groups at key stages. These could be carried out by

us or by yourselves, according to your resource availability and preferences;

* Statutory Consultation – Looking further into the future, if the Council decides to take

any of the options forward to statutory consultation, we can provide support in various

ways with this: preparation of the Consultation Proposal, support at Public Meetings, setting up online tools for handling representations; preparation of Consultation Report

and so on.

INDICATIVE COSTS:

* School visits – we should be able to visit the 50+ schools in Moray over ten working

days, assuming five/six schools per day, visits of an hour each and an order that minimises

travel distance between them. This is such as essential part of the process that we find it

best for two of us to visit each school. Budget on the basis of £20k for this stage which

would include an initial desktop review of estate issues, preparation time, generation of

an initial list of options and 'red lines'. We have found that it is most efficient if the Council liaises with the schools to arrange the visit schedule on our behalf; and we would

want a short meeting with all of the Head Teachers at the outset to introduce ourselves

and to save time by covering all of the general questions about the process etc;

* Liaison with Local Councillors, Parent Groups, Community Groups etc. We would

always seek to schedule these on evenings around days when we are already in Moray for

the school visits, workshops etc . If this can be done then there would be no additional

fee unless some specific additional preparation or reporting is required;

* Head Teacher Workshops – these are labour-intensive to prepare for and require two

people to facilitate. Budget on the basis of £3k per workshop, less if we were doing a

series of workshops;

* Reporting – This could be a simple powerpoint presentation summarising findings and

recommendations, but we normally produce a comprehensive written report on an exercise of this nature which would form the sound evidential base underpinning any future statutory consultation, and elsewhere have been produced as appendices to the

statutory consultation reports. We would need to discuss the specific content of such a

report (for example, a detailed analysis of placing request patterns can be very revealing,

but is a time consuming exercise) but around £10k for a detailed report with analysis

would be a sensible budget estimate, much less if you would prefer a simple powerpoint

presentation;

* Communications – we would have to quote for design, production and distribution of

printed material (eg newsletters) as these involve external costs that are volume-related.

Online activities such as questionnaires, blogs etc are less expensive to set up and a budget of £4k would be a reasonable allowance to cover set up, with running costs (to

write blogs etc) over and above;

We have provided indicative hourly rates of between £100 and £125 to hub north for activities

of this nature as part of their supply chain, and the costs above are broadly based on rates at this

level. In reality, however, we find that this kind of work doesn't really fit with a 'charge by the

hour' structure because there is no additional cost to us for working on in the evenings (meeting

Parent Councils or briefing Councillors for example) if we are already spending a large block of

time 'on the road' on your behalf. We would, however, want to include an agreed amount to

cover overnight and travelling costs, on the understanding that we always use low cost B&B

accommodation.

I hope this all helps move things along, and look forward to discussing with you further,

Best wishes

Martin

Martin Finnigan | Managing Director | CalEc

PLEASE NOTE CHANGE OF ADDRESS FROM 9 APRIL 2013:

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