

The Moray Council

SCHOOL ESTATE STRATEGY

AND

ASSET MANAGEMENT PLAN

November 2004



Foreword by Convener of Moray Council

TABLE OF CONTENTS

1	INTRODUCTION AND CONTEXT	5
1.1	INTRODUCTION.....	5
1.2	THE COUNCIL.....	5
1.3	CORPORATE PLANNING.....	6
1.4	COMMUNITY PLANNING.....	7
1.5	BEST VALUE AND THE SCHOOLS ESTATE.....	7
1.6	STRATEGIC OBJECTIVES.....	8
1.7	IMPACT OF WIDER ENVIRONMENT.....	9
2	STRATEGIC ISSUES.....	11
2.1	STRATEGIC ASSET OBJECTIVES	11
2.2	STRATEGIC PROPERTY REVIEW	11
2.3	RESOURCE CONTEXT.....	13
2.4	STAKEHOLDER VIEWS	13
2.5	INFORMING STAKEHOLDERS AND SEEKING VIEWS.....	14
3	DELIVERING BETTER PUBLIC SERVICES THROUGH THE SCHOOL ESTATE.....	15
3.1	COUNCIL AND OTHER RELEVANT SERVICES.....	15
3.2	LOCAL COMMUNITY NETWORKS.....	15
3.3	ISSUES	15
3.4	WORKING WITH OTHER AGENCIES	16
4	CURRENT POSITION	17
4.1	STATEMENT OF PORTFOLIO	17
4.2	EXTENT OF THE SCHOOL ESTATE	17
4.3	VALUE OF THE SCHOOL ESTATE.....	17
4.4	CONDITION OF THE SCHOOL ESTATE	18
4.5	SUFFICIENCY OF THE SCHOOL ESTATE.....	19
4.6	SUITABILITY OF THE SCHOOL ESTATE	19
4.7	FINANCIAL PERFORMANCE OF THE SCHOOL ESTATE	20
5	CORE FACTS.....	22
5.1	INTRODUCTION.....	22
5.2	CORE FACT 1: EXTENT OF THE ESTATE.....	22
5.3	CORE FACT 2: VALUE OF THE ESTATE	23
5.4	CORE FACT 3: CONDITION	23
5.5	CORE FACT 4: SUFFICIENCY.....	24
5.6	CORE FACT 5: SUITABILITY	25
5.7	CORE FACT 6 FINANCIAL.....	25
6	SUMMARY OF NEED	27
6.1	SCHOOL ESTATE MEETING CURRENT NEEDS AND OBJECTIVES.....	27
6.2	LIKELY NEED FOR INVESTMENT RE SUITABILITY.....	27
6.3	ISSUES RELATED TO SUFFICIENCY	28
6.4	REPLACEMENT IT (PPP).....	29
7	REVIEW AND OPTIONS	30
7.1	NEEDS AND PRIORITIES.....	30
7.2	PROPERTY OBJECTIVES AND DELIVERY MECHANISMS	31
7.3	STRATEGIC OPTIONS	31
7.4	FINANCIAL REVIEW AND CONSIDERATION OF POTENTIAL OPTIONS	32
7.5	REVENUE AND CAPITAL FINANCING CONTEXT	32
7.6	FINANCIAL APPRAISAL OF EXISTING SITUATION.....	33
7.7	POTENTIAL FUNDING OPTIONS FOR THE COUNCIL.....	33
8	METHOD TO DEVELOP PRIORITIES.....	35
8.1	SCHOOL ESTATE MANAGEMENT PLAN – OVERVIEW	35
8.2	METHODOLOGY.....	35

8.3	QUANTITATIVE AND QUALITATIVE METHODS.....	36
8.4	VALIDITY AND RELIABILITY	36
8.5	WEIGHTING AND RANKING	37
8.6	CONSULTATION PROCESS	39
9	PRIORITIES.....	40
9.1	PROGRAMME FOR ACTION	40
9.2	PHASING	41
10	OPTIONS.....	42
10.1	OPTION APPRAISAL	42
10.2	CONSULTATION.....	43
10.3	FINAL SELECTION AND IMPLEMENTATION.....	43
11	IMPLEMENTATION PLAN.....	45
11.1	PURPOSE AND OBJECTIVES.....	45
12	APPENDIX 1.....	54
12.1	CORE FACTS DATA SUMMARY SHEETS 1- 6.....	54
12.2	EXTENT	55
12.3	VALUE.....	56
12.4	CONDITION	58
12.5	SUFFICIENCY.....	59
12.6	SUITABILITY	60
12.7	FINANCIAL PERFORMANCE	61
13	APPENDIX 2.....	63
13.1	RESOURCE NEEDS AND FUNDING REQUIREMENTS.....	63
13.2	LONGER TERM FINANCIAL PLANNING	64
14	APPENDIX 3.....	65
14.1	FULL PRIORITISED LIST OF SCHOOLS.....	65
15	APPENDIX 4.....	66
15.1	PRIMARY SCHOOL ACCOMMODATION TABLE (FORMULA)	66
16	APPENDIX 5.....	67
16.1	WEB SURVEY RESULTS.....	67
17	APPENDIX 6.....	74
17.1	SYSTEM USED TO GIVE RANKING SCORES TO SCHOOLS	74

1 INTRODUCTION AND CONTEXT

1.1 Introduction

- 1.1.1 Moray is situated in the North East of Scotland along the Moray Firth Coast, approximately midway between Aberdeen and Inverness. In geographical terms, Moray Council is one of the largest unitary Authorities covering an area of about 861,000 square miles but with 87,615 residents has the second smallest population.
- 1.1.2 Moray is a predominantly rural area and schools are an important local resource and focal point for communities. The employment structure shows high concentrations in primary industries such as fishing, farming whisky and food. In addition there is a substantial MOD presence at the two RAF bases at Lossiemouth and Kinloss. The future of these bases is currently under review.
- 1.1.3 Whilst Moray is an attractive area offering a high quality of life, it nevertheless faces significant challenges, in particular, its reliance on traditional industries which are now facing decline and the threat of closure of RAF bases (to be announced in 2005). Average wage levels (excluding RAF personnel) are amongst the lowest in Scotland (new earnings survey: Office of National Statistics). Growth markets are in the retail and service sectors, which require a new range of skills.
- 1.1.4 The challenge for the Moray Council is to provide opportunities for the development of new skills for its residents and to prepare young people for employment opportunities, which differ greatly from those in the recent past.

1.2 The Council

- 1.2.1 Moray Council is an authority with a clear focus on education. The provision of a high quality environment conducive to learning and teaching is a key goal.
- 1.2.2 It is a goal that needs to be achieved in a financial environment that demonstrates Best Value, Continuous Improvement and Value for Money, with projects that are affordable by the Council.
- 1.2.3 The Council is aware of the influence that quality school buildings have on educational attainment and is keen to ensure that such provision is equitable across all educational sectors.
- 1.2.4 The Council has put a number of strategies in place to improve standards of attainment and the School Estate Management Plan (SEMP) is an important element of that local strategic approach to the school estate.
- 1.2.5 The Council acknowledges that this is the starting point of the process and a method of moving to a more proactive approach to the management of school assets.
- 1.2.6 Members have been briefed at intervals with regard to progress being made on the review of the Draft School Estate Management Plan produced in 2003.

- 1.2.7 As part of the Educational Services Improvement Plan, a working group has been established to finalise the strategy on Estate Management planning to include the need to address over capacity in the primary Sector.
- 1.2.8 The Council's Asset Management Plan (Approved by Council in April 2003) is in its early stages and is seen as an increasingly important aspect of the Council's Financial Planning process. The medium term plan (2004-2007) is focused on gathering information in order to establish a consistent database of information to enable prioritisation and allocation of resources for maintenance and replacement. An Asset Management Plan Working Group (AMPWG) of Senior Council Officers has been established to develop and manage the Council's Asset Management Plan. The chair of the AMPWG is the Chief Financial Officer. The work that has been done to prepare the SEMP is in parallel to this corporate initiative and conforms to the Council's overall Asset Management Plan.
- 1.2.9 The Educational Resources Manager is responsible to the AMPWG and the Director of Educational Services for the SEMP. The Director of Educational Services and the AMPWG are accountable to the Council through the Corporate Management Team (CMT) for implementation of the Plan. All the appropriate chief officers and lead professionals are members of AMPWG and sub groups are formed as necessary to address particular issues for the Council. Sub groups have been established to look at Asbestos, Disability Discrimination Act (DDA) and Fire Safety within schools. These groups have completed their investigations and rolling programmes for identified issues have been put in place. The AMPWG reports quarterly to the Policy and Resources Committee and regularly to CMT.

1.3 Corporate Planning

- 1.3.1 The Council's Corporate Development Plan, 'Progress through Partnership – Making a Difference' explains how the Council will improve public services over the period 2004 to 2007. The Council's ambition is to progress in partnership with communities and other public bodies to make a positive difference to the quality of life for all.
- 1.3.2 The Moray Council has adopted eight priorities for service development in its Corporate Plan, namely:
- Delivering effective flood alleviation schemes
 - Improving attainment and achievement in Educational Services
 - Improving care for the individual, especially the disadvantaged
 - Maintaining and improving roads
 - Developing leisure facilities across Moray
 - Reducing, re-using and recycling waste
 - Providing easy access to services
 - Listening, consulting and engaging with communities
- 1.3.3 Each Department of the Council has developed a Service Plan incorporating the projects highlighted for their services. The School Estate Management Plan forms part of the Educational Services development plan over the next four years and beyond.

1.4 Community Planning

- 1.4.1 The Council and its partners, along with the public and other groups with an interest in the future of Moray, have put together the Community Plan. The Plan at this stage concentrates on how the partners can deliver better services to the public. They aim to do this by collaborating more with each other and by seeking to involve the public more directly in their decision-making. The plan is aimed at improving local circumstances.
- 1.4.2 The themes and actions for the Community Plan have been developed in response to output from seminars and other discussions with interested organisations, and take account of national guidelines. They are: -
- Achieving a safer community
 - Improving travel facilities, choices and safety
 - Investing in children and young people
 - Achieving a healthy and caring community
 - Building stronger communities
 - Working for increased prosperity
 - Protecting and enhancing the environment
- 1.4.3 The Community Plan will inform the strategic direction of the School Estate Management Plan and will influence the prioritisation, development and maintenance of the school estate.

1.5 Best Value and the schools estate

- 1.5.1 The Moray Council is committed to the principles of Best Value. They are regarded as an effective way of ensuring quality and value for money in the provision of services. They are essential in raising educational attainment and achievement.
- 1.5.2 There are a number of cross cutting issues to Best Value. These are joint working, equal opportunities and sustainable development. These areas combined with the commitment for year on year improvement provide a powerful driver for performance improvement. These cross cutting themes inform and influence all aspects of Best Value work. This includes all the stages from planning to delivery and review. The Council fully accepts these concepts and they filter throughout the following areas: -
- The Executive Management structure
 - Corporate planning
 - Consultation with stakeholders
 - Communication with staff and others
 - Governance
 - Allocation and distribution of resources; and
 - Review systems and practices
- 1.5.3 The work as outlined in this plan is in keeping with Best Value principles of securing continuous improvement of the school estate. By using a combination of different funding methods (prudential borrowing, PPP and

funding from the Executive) combined with sound management of revenue costs, the Council is putting the mechanisms in place for sustained improvement to school buildings.

- 1.5.4 A major part of Best Value in asset management planning is ensuring that reviews and option appraisals challenge current processes. In addition, there needs to be an appropriate and systematic approach to consultation and feedback with stakeholders. The Council believes that its Best Value implementation has adopted a robust and thorough approach in both these critical areas.
- 1.5.5 The outcomes from such arrangements will be a clearly identifiable improvement in the school estate over time. Performance Measures are currently being developed by the Council, which will allow checks to be made on the success of the SEMP.
- 1.5.6 Strong networks have been developed with family authorities and these have facilitated the exchange of best practice information.

1.6 Strategic Objectives

The Council's Vision for Education

- 1.6.1 The Moray Council is committed to the provision of quality education and learning opportunities for all children and adults. This is one of the eight priorities set in the Corporate Development Plan. The environment within which people learn is critical to their success and consequently the buildings and facilities must also be of a high quality.
- 1.6.2 Rural communities are faced with the gradual erosion of facilities and services and the Council is conscious of rural schools' potential as a community resource.
- 1.6.3 The Council's vision for its school estate is that it achieves the following objectives:
 - Provide a full range of services
 - Provide an environment which motivates staff & pupils
 - Allow greater use of modern learning and teaching methods
 - Provide a healthy learning environment
 - Provide facilities which staff, pupils and the wider community can be proud of
- 1.6.4 The purpose of Educational Services within Moray is defined as:

Providing a range of progressive lifelong learning, cultural and leisure opportunities designed to meet the needs of the people of Moray which enable them to become positive, informed, skilled, healthy and active citizens.
- 1.6.5 In achieving the purpose, Educational Services aim to:
 - Promote learning as a lifelong process
 - Support people in achieving their full potential

- Provide safe, welcoming and attractive learning environments
- Provide access to services for all
- Raise achievement and attainment
- Recognise and share success
- Work in partnership with other services, agencies and the wider community
- Continuously improve the quality of the services provided
- Ensure best value in everything the service does

1.6.6 Aims, visions, achievements and challenges most relevant to the school estate are embedded in the Council's Education Strategy. A summary of recent achievements is set out below:

Achievements

- a. The Council has significantly increased IT facilities and provision within schools through a PFI project.
- b. The Council has developed Community Learning Plans with local communities across Moray.
- c. All Council schools are part of the Local Community Network developed from the New Community School programme
- d. The majority of pupils with special needs are now integrated within mainstream schools with the establishment of special needs bases within 13 primary and secondary schools
- e. Increased community access to schools has been achieved through a restructuring of the janitorial and care-taking service.
- f. A comprehensive set of policies and guidelines dealing with issues related to health, safety, health education and security has been developed.
- g. Increased school access to community facilities has been achieved through major developments at Forbes, Keith and Buckie.
- h. Door entry systems and CCTV cameras have been introduced at all schools to improve safety and security.

1.7 Impact of wider environment

National Priorities for Education

- 1.7.1 Moray Council recognises the five key objectives for education set by the Scottish Executive. These objectives underpin Moray Council's corporate and educational values and aims, and are at the centre of the Education strategy.
- 1.7.2 The key drivers that affect the SEMP strategy are to provide sufficient appropriately located educational facilities and capacity and managing the investment required to achieve the requirements of a 21st century school.

Demographics within the Council area

- 1.7.3 The primary factor in the Educational strategy that affects the SEMP is the forecasts and predictions about future demand in terms of volume and location. Medium term planning is essential if capacity is to be provided

where it is required in 5-10 years time. In Moray, the current and forecast trends are for a declining school population.

- 1.7.4 Population projections provided by GRO Scotland (2002 based) indicate an overall decline in Moray's population from 2002 to 2009 from 86,740 to 83,938. The under 18 population, currently 20,364, is forecast to decline to 15,366 by 2016. The table below gives a breakdown of these figures by age groups.

	All Ages	Up to 18	19 - 65	66 +
2002	86740	20364	52866	13510
2009	83938	18092	51053	14793
% change 2002-2009	- 3.23%	-11.16%	-3.43%	+ 9.50%
2016	80827	15366	48406	17055
% change 2009-2016	-3.71%	-15.07%	-5.18%	+ 15.29%

- 1.7.5 Whilst the GRO population projections provide an indication of possible future population trends, they should be treated with caution. They are based on assumptions relating to fertility, mortality and migration. Any change in assumption could result in significant differences to one or more factors. For example, the GRO projected that in 2003 (i.e. the first year of the projections) that the population of Moray would fall to 86,294. However, the 2003 mid year projection estimate provided by GRO was 87,460. The greater part of the difference being explained by higher than assumed migration figures during 2002-2003. In order to attempt to address the difficulty relating to assumptions, the Council has taken on a demographic consultant to assess and review the GRO projections.
- 1.7.6 Moray's schools currently provide 10,477 primary and 6,540 secondary school places. The current total number of primary pupils is 7,653, projected to decline to 6,586 by 2011. The current total number of secondary pupils is 6,021, projected to decline to 5,520 by 2011. The implications for individual schools are shown in the extended information presented in the Core Facts 4 spreadsheet 12.5 on page 59.

2 STRATEGIC ISSUES

2.1 Strategic asset objectives

Overview

2.1.1 In order to secure best value for its residents, the Council must ensure that its schools meet the following objectives:

- provide an environment which motivates teachers and learners;
- facilitate learning;
- serve the needs of local communities;
- make best use of the school estate, matching the needs of the local population.

The school estate does not currently meet these objectives. Design defects and lack of provision for ongoing investment in the physical fabric of the schools has led to an increasing maintenance backlog in excess of £6m This plan will prove a starting point for the rectification of this situation.

2.1.2 The inadequate accommodation and facilities within some schools inhibits the learning process. The Council wishes to make improvements so that all schools at least meet satisfactory standards and beyond this, to consider improvements in the following areas:

- To increase ICT facilities and upgrade to meet the needs of disability legislation and make provision for the period following the current ICT PFI contract.
- Continued expansion of the provision of special needs bases within mainstream schools.
- Social areas in secondary schools
- Changing facilities in Primary Schools
- Vocational teaching
- To increase the range of services provided from schools such as community access to libraries and sports facilities.

2.2 Strategic Property Review

School Capacity

2.2.1 In common with other rural areas, Moray's school age population is declining which is leading to a significant over supply of capacity in primary schools and to a much lesser extent in secondary schools by 2011. This issue is complex however, with account needing to be taken of government legislation in relation to class sizes, travel distances, accessibility, pupils' social needs and the importance of schools as a resource within isolated communities.

2.2.2 The school estate management plan has at its centre finding the balance between community and education needs, and the affordability of maintaining and re-investing in the estate. Against a five to ten year time horizon a prudent approach would be to examine carefully the options for school mergers and rationalisation of the estate. Detailed assessments of capital investment decisions will include focusing particularly on community use and transport issues as they affect sustainability and environmental concerns.

- 2.2.3 All school development plans are focused upon achieving local and national priorities and Council aims. All establishments have systems in place for evaluating provision based on National Performance Indicators.
- 2.2.4 The Core Facts (See Section 5) information spreadsheets have provided a comprehensive basis for measuring the performance of the SEMP. Immediate factors that inform the options appraisal and programme planning of maintenance and capital expenditure are derived from the assessments of Condition, Sufficiency and Suitability. The Backlog maintenance may be monitored and measured through the estimates of work in each category; Year 1, Year 2 and Years 3 to 5.
- 2.2.5 Performance Measures will be reviewed and developed that will be linked to whole life property costs and service outputs as well as floor areas, which must feed into the best value framework. The Council will develop a structured framework to show:
- A set of local performance measures based upon core facts in relation to asset use;
 - Performance measures that link asset use to corporate goals;
 - Performance measures that link asset use to Educational Services goals;
 - A process to ensure continuous improvement;
 - A process to measure user (stakeholders) satisfaction with the asset.
- 2.2.6 The above measures will be included in cyclical performance reports that will be provided to Councillors and Chief Officers.
- 2.2.7 Key policy documents to which the performance measures will relate include:
- Council Corporate Development Plan;
 - Council Corporate Asset Management Plan
 - The Moray Community Plan;
 - Educational Services Improvement Plan.
- 2.2.8 The performance measures will draw upon best practice by considering appropriate sources of information and implementing established indicators. The following list of performance measures should be seen as a starting point from which other measures will be developed and existing measures refined:
- Key Performance Indicators to measure capital projects and used in line with Egan principles (Egan's targets include - Reducing capital costs by 10% / Reducing construction time by 10% / Reducing defects by 10% / Reducing accidents by 10% / Increasing productivity by 10% / Increasing time and cost predictability by 20%).
 - Quality Indicators in the Design of Schools (QIDS) published by RIAS' (QIDS design factors include – Uses and Spaces / Character and Form / Access / Internal environment / External environment / Social integration, sustainability and ecology / Engineered systems and performance / Construction).
 - Design Quality Indicators published by CIBE (DQI addresses the following 3 critical areas – Functionality / Build Quality / Impact).
 - Life Cycle Indicators (a systematic approach balancing capital with revenue costs to achieve an optimum solution over a buildings whole life).

- Customer satisfaction measures for both the product (work done) and the service (the way it was provided).
- Feedback from questionnaires to Head Teachers following building improvement.
- Feedback from questionnaires to pupils.
- Feedback from questionnaires to parents.
- Feedback from questionnaires to key staff and organisations.
- Meetings with School Boards.
- Reduction in energy costs (per square metre) through monitoring expenditure and comparing results with previous years.
- Improvement in condition of school buildings (based on A, B, C and D categories).
- Reduction in maintenance costs from 2008/2009 as a consequence of investment to improve condition.
- Reduction in excess capacity in Primary schools.
- Increase in asset utilisation.
- Improvement in suitability of schools (based on A, B, C and D categories).
- Reduction in 'hutted', temporary and remote accommodation.
- Improvement in safety performance of buildings.

2.3 Resource context

- 2.3.1 A core aspect of the School Estate Management Plan is to identify resource needs and funding requirements to put in place a long-term financial plan for the school estate. The Plan identifies the priorities that need to be addressed and the extent of the financing deficit in the school estate (See Appendix 2 section 13 on page 63)
- 2.3.2 The School Estate Management Plan will form part of the Council's Corporate Asset Management Plan. In this respect, Educational Services will be bidding within the wider resource context of the Corporate Asset Management Plan.
- 2.3.3 Resources will mainly come from prudential borrowing although it is to be hoped that financing from the Executive will also be forthcoming as a direct consequence of this piece of work. A range of potential financing options along with the financial plan based on existing information and a more detailed assessment of the resources context in which the SEMP sits is discussed in section 7.
- 2.3.4 Sustainability will be a significant factor in the development of the Corporate Asset Management Plan and the supporting financial plan.

2.4 Stakeholder views

- 2.4.1 The Moray Council is fully committed to the principles of modernising government especially through the use of Information Technology. The approach described further below is fully in line with the Government's aspirations for its E-Government strategy.

- 2.4.2 A critical factor in developing the school estate is ensuring that stakeholders are consulted and involved at all stages of the process. However, this can be problematic when many different groups are involved because the same consultation medium may not be appropriate in all cases.
- 2.4.3 Because of the diversity of the stakeholder audience and rural nature of Moray, the Council has developed different ways of engaging individuals and groups in the consultation process.

2.5 Informing stakeholders and seeking views

- 2.5.1 The information and consultation process commenced with presentations explaining the background to the School Estate Management Plan to key stakeholders:
- Elected members and Senior Officers
 - Head Teacher Management Group
 - School Boards
 - Union Representatives
- 2.5.2 The Moray Council has taken full advantage of IT and developed a web-based survey through its main web site. This survey has been notified directly to schools asking them to circulate information to staff and pupils. In addition, schools were asked to issue a letter to parents, via pupils, ensuring that the web survey address was widely known. 807 surveys were completed and a summary of results is attached as Appendix 16 on page 67. Comments relating to specific schools were considered within the suitability survey and will also provide useful data in the options appraisal process.
- 2.5.3 The Moray Council along with partner agencies toured local communities during 2003. The School Estate Management Plan was the main theme of the Educational Services 'information stand' and opinions and views of visitors were sought through a quantitative and qualitative survey.
- 2.5.4 Information has also been provided to all employees of the Council through their payslips. In addition, Community Councils and partner agencies have been contacted inviting them to take part in the web survey. A paper-based survey was also developed which was used at information road shows, community council meetings and meetings with other partner agencies.
- 2.5.5 The School Estate Management plan has featured in local press, explaining the rationale and advertising the opportunity to take part in the consultation process.
- 2.5.6 The consultation process is highlighted in the Educational Services Improvement plan. Beyond the completion of the school estate management plan, Working Group 9 is committed to the following timetable:
- Information and consultation exercise on estate management over capacity (January to March 2005 and September to October 2005).
 - Submission of proposal for estate management including over capacity for Council approval (December 2005).

3 DELIVERING BETTER PUBLIC SERVICES THROUGH THE SCHOOL ESTATE

3.1 Council and other relevant services

Types of use

3.1.1 The Moray Council recognises that whilst the primary function of schools is to provide education to pupils, these assets are essential in contributing to and meeting the needs of a wide range of individuals and groups. At present, school buildings are used for:

- Pre school and Nursery provision;
- General community use;
- Evening classes and courses;
- Out of school hours clubs;
- Uniformed voluntary organisations;
- Events, seminars and meetings.

3.2 Local Community Networks

3.2.1 Local Community Networks, based on each secondary school and feeder primaries, are a development of the Scottish Executive's initiative on New Community Schools and The Moray Council Child Care Strategy. Schools are a focus for this approach, which has as its key aims:

- To facilitate and develop effective communication structures and integrated working practices by all specialist agencies working with children, young people and families within the local area;
- To actively assist in the development and delivery of new and existing projects;
- To participate in the local community planning framework.

3.3 Issues

3.3.1 Declining occupancy in schools means that in 10 years, a high percentage of schools in Moray will have considerable spare capacity.

3.3.2 Matched against this are both the Council and other public service providers' commitment to residents that no community should be disadvantaged due to its geographical location. Schools may offer valuable accommodation in small communities.

3.3.3 Moray Council currently provides transport to all pupils living more than 2 miles from school. Whilst not an issue at present, this may become a factor should further rationalisation of schools take place.

3.3.4 Increasing space pressures on Council buildings and services will be considered to determine how schools may be utilised to close this gap and avoid unnecessary expenditure on developing existing or acquiring new assets.

- 3.3.5 There will be implications on both the process and management of School devolved budgets where buildings are used by a range of agencies. Consultation with all appropriate stakeholders will be essential in maintaining the integrity of the school budget and at the same time creating flexible use of schools.

3.4 Working with other agencies

Partnership working

- 3.4.1 The Moray Council is committed to partnership working and to supporting local communities in identifying and achieving their goals.

- 3.4.2 Achievements have been made in partnership development:

- Educational Services ensures that children, young people and parents, and staff are actively involved in decision making about services;
- Local Community Networks (New Community Schools) are successfully operating across Moray and are based on a secondary school and its feeder primaries.
- Nursery, pre-school and after-school provision is provided across the authority using a combination of local authority, voluntary, company and private providers;
- 8 community-learning plans have been developed in partnership with local communities;
- A 7-year ICT PPP has been entered into to service a Moray wide educational network. This also involved a major upgrade of existing systems.
- Hungry for success: A diverse interagency group has been established to promote and support healthier eating within schools.
- Active schools: A four year partnership has been entered into with sportscotland to promote increased levels of physical activity amongst school age children.

- 3.4.3 The Council is working to achieve the following improvements:

- Provision of accommodation within schools to enable other agencies to operate from them;
- Strengthening of links between schools and communities;
- Development of interdisciplinary working needs to be progressed;
- Further develop the potential of new technology in communities to promote consultation;
- Investigating PPP arrangements to modernise and upgrade part of the existing school estate.

4 CURRENT POSITION

4.1 Statement of portfolio

- 4.1.1 Core facts tables have been prepared in accordance with the Scottish Executive guidance in “Building our future: Scotland’s school estate. Section 5 describes in more detail the content of each core fact.
- 4.1.2 The information contained in the tables below relates to each of the six core facts. Tables do not include schools currently proposed for Moray’s PPP Project.

4.2 Extent of the school estate

- 4.2.1 Moray’s school estate comprises 8 secondary schools, 46 primary schools and 2 specialist educational facilities. These schools are dispersed across the district and in addition to their core purpose, many provide community resources for lifelong learning.
- 4.2.2 There are 21 nurseries within primary schools. In addition, 13 playgroups operate either within a primary school or from accommodation on the site.
- 4.2.3 Two schools (Keith and Kinloss Primaries) operate on two separate campuses. In view of this and also taking account of other factors such as condition, suitability and sufficiency, these two establishments have been included within the Council’s current PPP project.
- 4.2.4 There are 25 schools (excluding PPP schools) that have remote accommodation on the same campus. Thirteen of these schools have remote classrooms and twelve have separate servery, kitchen, dining, hall or nursery accommodation.
- 4.2.5 Other than PPP schools, there are only two establishments where accommodation is shared. Beechbrae specialist facility, although a distinct and separate unit, shares accommodation with Educational Psychological Services and a number of educational support staff. Tomintoul school houses a public library.
- 4.2.6 Buckie High, Elgin High, Lossiemouth High and Speyside High schools all have community centre facilities attached to or integrated within the main school. Buckie, Lossiemouth and Speyside also incorporate swimming pool facilities.

4.3 Value of the School Estate

- 4.3.1 The 2004 revaluation of the School Estate has estimated the Gross replacement value at £219m and the net value as £123.6m. From a financial point of view, the useful life for depreciation of the estate is shown in the table below:

Useful life for depreciation (range in years)	Number of schools in range
15	1
20	7

Useful life for depreciation (range in years)	Number of schools in range
30	11
40	21
50	4
60	9
80	1

4.4 Condition of the school estate

4.4.1 The age of the buildings varies considerably with 24 primaries over 100 years old and 11 being built or extended in the 1960's and 1970's. Five secondary schools were built in the 1960's and 70's with Milne's High School being the most recent, opening in the 1980's (see Appendix 1 section 12.3 on page 56).

4.4.2 The following table shows the number of schools in the 4 categories (A-D).

Category	Definition	Number of schools in category	Breakdown by sector
A	Good – Performing well and operating efficiently	5	5 Primary
B	Satisfactory – Performing adequately but showing minor deterioration	31	28 Primary 3 Secondary
C	Poor – Showing major defects and / or not operating adequately	9	8 Primary 1 Secondary
D	Bad – Life expired and or serious risk of failure	5	3 Primary 2 Secondary

4.4.3 Despite the age of some schools, 36 (72%) remain in condition A or B.

4.4.4 Those schools categorised as D have specific problems with heating systems that are life expired. Failure of these systems could potentially lead to temporary closure of a school. It is important to note that the buildings themselves are not life-expired.

4.4.5 The backlog maintenance is broken down into three levels (works required in year 1; year 2 and years 3 - 5) as shown in the following table.

Year 1	Year 2	Years 3 - 5
£1,005,820	£1,627,265	£3,717,880

4.4.6 The total backlog over the period 1 to 5 years is £6.3m.

4.5 Sufficiency of the School Estate

- 4.5.1 In common with most other areas, Moray's school age population is declining which is leading to an over capacity in schools. This issue is complex however, with account needing to be taken of travel distances, accessibility, pupils' social needs and the importance of schools as a resource within isolated communities.
- 4.5.2 The Council has set a threshold of 60% as the capacity or sufficiency baseline. The following table shows the current situation.

% range as at 2004	Number of schools in range
20 or below	1
21 - 29	1
30 - 39	0
40 - 49	1
50 - 59	3
60 - 69	11
70 - 79	13
80 - 89	12
90 and over	11

- 4.5.3 Nine schools are projected to increase their roll over the period 2005 to 2011 (Eight schools in a range between 4 and 12% and 1 school showing a projected increase of 22%). The remaining schools are projected to show a decrease in their roll over the same period (of these 10 schools show a projected decrease of 20% or more). By 2011 it is projected that 18 Primary Schools will be below the 60% baseline.
- 4.5.4 Of the 6 primary schools that are currently below the 60% range, 3 are projected to increase their roll with 1 rising above the 60% baseline by 2011. Three schools are projected to show declining rolls over the same period.

4.6 Suitability of the School Estate

- 4.6.1 Suitability of the estate is at the centre of the Council's future aspirations for the Schools Estate Management Plan. As in many authorities this means seeking to improve the inheritance of sometimes solid but inflexible 19th century buildings and more adaptable but less resilient 20th century properties.
- 4.6.2 The suitability aspect is also closely tied in with issues contained in the 'extent of the school estate' most notably remote accommodation (see 4.2.4. above).
- 4.6.3 The suitability survey provides the starting point for improving the quality of buildings. The results are summarised in the table below.

Category	Definition	Number of schools in category	Breakdown by sector
A	Good – Performing well and operating efficiently	1	1 Pinefield Parc
B	Satisfactory – Performing well but minor problems	40	37 Primary 2 Secondary 1 Beechbrae
C	Poor – Showing major problems and / or not operating optimally	11	7 Primary 3 Secondary
D	Bad – Does not support the delivery of services to children and communities	0	0

4.6.4 Although 40 schools are categorised 'B', some common issues have been identified that are a problem in many schools. Some of these issues will be addressed through a rolling programme of works and others through the options appraisal process.

Classroom size and location	Access for disabled
Door Security	Fire safety – building protection
Pupil toilets	Changing facilities
Dining and Kitchen facilities	Pupil social areas
Staff facilities (toilets and staff rooms)	Vocational work areas
Ventilation	Heating (control)
Solar gain / Solar glare	

4.6.5 An important aspect in considering suitability is the potential to address some of the sufficiency issues by reviewing in more depth what space is required to meet the needs of 21st Century schools. In this respect, the Council is still developing its own criteria about what is required for a 21st Century School. This may well influence the actions of the School Estate Management Plan and will also be considered alongside the PPP discussions in relation to requirements and creating an appropriate environment.

4.7 Financial Performance of the School Estate

4.7.1 The maintenance backlog figure is identified in 4.4.6 above.

4.7.2 The total response and planned maintenance costs for 2004/2005 are £1.127m split as follows:

- £563,500 response maintenance
- £563,500 planned maintenance

4.7.3 PPP service payments for ITC contract with ICL are currently £200,000 per annum until 2006.

4.7.4 An important aspect of financial performance is concerned with energy costs. The accumulated costs of piped gas, oil, electricity and water are shown in the table below. The calculation is based on energy costs per square metre showing the cost range within which schools fall.

Cost range	Number of schools in range
Under £5	1
£5 - £5.99	3
£6 - £6.99	12
£7 - £7.99	10
£8 - 8.99	9
£9 - £9.99	5
£10 - £11.99	4
£12 - £13.99	3
£14 - 14.99	1
£15 +	2

5 CORE FACTS

5.1 Introduction

5.1.1 Core facts about the school estate will contribute to the process of measuring the success of the school estate management plan. Core facts are used at both national and local level to do the following:

- Establish a baseline
- Inform targets
- Inform Spending decisions
- Support monitoring and evaluation of progress over time
- Support assessments of value for money

5.1.2 Core facts enable Moray Council to meet the immediate objective of capturing a broad strategic picture of where the Council is with regard to the school estate. Over the next few years, the level of detail will develop as knowledge grows and as more fine detail issues move up the agenda. Notwithstanding this, these core facts have been chosen to have broad relevance over several years.

5.1.3 The Scottish Executive's objectives for the 21st Century school are:

- To deliver better public services through the school environment that focus on:
 - The child at the centre – meeting the needs of individual children
 - The school at the heart of the community – meeting the needs of communities
- To deliver these services, in respect of the school estate through the right:
 - Condition – a safe, secure environment
 - Sufficiency – schools that match demand
 - Suitability – supporting the delivery of better public services including the provision of the right facilities
 - Life cycle management – taking the long-term view
 - Design – turning objectives into reality

5.1.4 Core facts capture aspects of the five elements above together with some other basic data on the estate and some financial data. The following paragraphs provide broad information about what is contained in each core fact. Appendix 1 Section 12 includes the specific details for each school.

5.2 Core Fact 1: Extent of the Estate

5.2.1 This core fact provides some basic general information on the extent of the school estate:

- Gross internal floor area (m²)
- Internal floor area of educational accommodation

- Site curtilage (m²)
 - Number of buildings
 - Number of sites occupied
- 5.2.2 The Estates Section carried out an on site survey review of all educational schools accommodation. This information was fed into Architectural Services who completed the task of developing an up to date electronic record of drawings and floor plans for all schools on the Computer Aided Design (CAD) database.
- 5.2.3 The SEMP includes all educational accommodation and community and swimming pool facilities where these are integrated in the same building. There is no residential accommodation in Moray and at present school buildings are not used for any other purposes.
- 5.2.4 The Estates Section have identified and quantified the curtilage of each school site and this information is held on the Council's Asset Management Database (School Building Asset Values Report)
- 5.2.5 The number of buildings on each school site is shown on the CAD database.
- 5.2.6 A significant element of core fact 1 is the number of sites occupied by a school. Kinloss and Keith Primaries are the only schools in Moray that occupy two sites. This was a major consideration in relation to prioritising these schools for the PPP initiative.

5.3 Core Fact 2: Value of the Estate

- 5.3.1 Core Fact 2 provides information on the value of the school estate:
- Gross replacement value
 - Accumulated depreciation
 - Net book value
- 5.3.2 All this information is contained within the Council's Asset Management database and is updated annually by the Estates Section.
- 5.3.3 The age of buildings impacts on all the above elements. The age of buildings varies considerably with 24 primaries over 100 years old and 11 being built or extended in the 1960's and 1970's. Five secondary schools were built in the 1960's and 70's with Milne's High School being the most recent opening in the 1980's (see Appendix 1 section 12.3 on page 56).
- 5.3.4 19 primary schools are indicated as potentially becoming life-expired within 30 years. This provides an opportunity to consider the viability of releasing some property over the plan period and achieving a level of capital receipt.

5.4 Core Fact 3: Condition

- 5.4.1 Core Fact 3 is a critical factor in determining priorities. It provides an assessment of the condition of schools along with expected costs of repairs and maintenance:
- Gross internal floor area judged to be in each of the condition categories;

- A: Good – Performing well and operating efficiently
 - B: Satisfactory – Performing adequately but showing minor deterioration
 - C: Poor – Showing major defects and/or not operating adequately
 - D: Bad – Life expired and/or serious risk of imminent failure
- Overall condition of each school based on the four categories above.
- 5.4.2 The gross internal floor area used in the supporting spreadsheets for each school has been calculated from the Estates Section survey in 2003 and is held on the Council's Asset Management database.
- 5.4.3 An initial desktop evaluation based on previous condition surveys (2000) and best information from Property Services was carried out in September 2003. This has now been updated following a full and detailed condition survey completed in September 2004. The assessment is based on a room by room breakdown of building condition. From this it has been possible to give each school an overall rating which takes account of lifecycle issues, health and safety and the potential risk of school closure arising from failure of key elements such as heating. This information is held on the Property Services Condition Survey database.
- 5.4.4 Moray has completed its asbestos surveys and has identified that £30k per annum will be sufficient to eliminate and manage the outstanding problems in schools.
- 5.4.5 Disability Discrimination Act surveys and assessments looking at public areas and access in secondary schools have also been completed in relation to the 1995 DDA Act. The Council will put in place a prioritised programme of works in relation to all Council buildings, along with the scale of funding required. An audit of schools in relation to the Special Educational Needs and Disability Act 2001 was carried out and a programme of action is being implemented.
- 5.4.6 Audits have also been carried out on Fire safety, smoke detection, Legionella Disease, Asbestos and Special Needs Access and a programme of measures is in place.

5.5 Core Fact 4: Sufficiency

- 5.5.1 This Core Fact is also a critical factor in determining priorities. It is concerned with sufficiency of the school estate (capacity) and has three elements:
- The school roll and projected trend
 - Capacity of each school
 - Formula used to calculate capacity
- 5.5.2 Moray maintains close assessment of schools below 60% of functional capacity occupancy levels. Core fact data sheet 4 (Appendix 1 section 12.5 on page 59) shows both the current and forecast school roll figures for each year up to 2011.
- 5.5.3 The basis for determining the capacity of Secondary Schools has yet to be agreed. The historical basis under the Grampian Regional Authority was to build secondary schools to a nominal 1000 pupil total. Sufficiency results for secondary schools indicate that Elgin Academy will be over-stretched in the

medium term. To this end the proposed PPP will lead to necessary investment to address this situation.

5.5.4 The basis for determining capacity in Primary schools requires to be reviewed. A number of factors need to be considered:

- Maximum class sizes – 33 pupils
- Composite class sizes – 25 pupils
- Early stages class sizes – 30 pupils
- Space required per child
- School roll and functional capacity for a given year
- Increased need for GP space

5.6 Core Fact 5: Suitability

5.6.1 This Core Fact is the third critical factor in determining priorities. It is concerned with how suitable the school is for 21st Century education. Each school is given a rating (A-D):

- A - Good – Performing well and operating efficiently (the school buildings support the delivery of services to children and communities).
- B - Satisfactory – Performing well but with minor problems (the school buildings generally support the delivery of services to children and communities).
- C - Poor – Showing major problems and/or not operating optimally (the school buildings impede the delivery of activities that are needed for children and communities in the school).
- D - Bad – Does not support the delivery of services to children and communities (the school buildings seriously impede the delivery of activities that are needed for children and communities in the school).

5.6.2 The Council undertook a review of the suitability and capacity of its estate in the context of preparing for the schools PPP outline business case. Schools were given scores for their suitability for current and future needs. Schools with high non-suitability scores were prioritised according to the following criteria:

- Elimination of split sites;
- Integration of community facilities;
- Replacement of accommodation not economic to refurbish.

5.6.3 This process identified Keith and Kinloss primaries and Elgin Academy and Elgin High school as the highest priority for investment. These schools are now included in a proposed PPP scheme.

5.6.4 A further major suitability review was carried out in August and September 2004.

5.7 Core Fact 6 Financial

5.7.1 The amount of Capital expenditure in 2004 is £2.2m of which £1.3m is allocated from the School Estate Strategy Fund. Revenue expenditure for

04/05 is £1.1m divided evenly between the planned and response maintenance programmes. In addition there is a £1.844m payment charge for the provision of ICT services across all Moray schools under a PFI arrangement.

- 5.7.2 This level of financial planning is not adequate to address the full range of current needs. In addition, the limited maintenance funding requires an active approach in integrating response and planned repairs if it is to be effective.
- 5.7.3 The utilities and energy use information can only be provided at present in financial terms.

6 SUMMARY OF NEED

6.1 School estate meeting current needs and objectives

- 6.1.1 The suitability survey provides valuable information on a wide range of elements. Although 72% of schools are categorised B (satisfactory, performing well but with minor problems), more work needs to be done to further review the criteria in relation to 21st Century schools. This aspect needs to be addressed alongside sufficiency issues. Schools that are categorised as C (showing major problems and / or not operating optimally) are included in the priority list for action. There are no schools categorised D (Bad, not supporting the delivery of services to children and communities).
- 6.1.2 There are common issues that emerge from the suitability survey that affect a number of schools ability to perform to a satisfactory standard. These common issues require to be addressed across all these schools through a rolling programme of upgrade and improvements.
- 6.1.3 The net value of the schools estate at depreciated value is £124m. At the RICS recommended level of 1.5% of capital value, this would suggest an annual planned maintenance budget of £1.86m, if the condition of the estate were good.
- 6.1.4 The impairment effect of continuing to retain a level of backlog maintenance will be monitored through the process of comparison of the condition, value and suitability of the estate as shown in the full audited surveys that are commissioned at regular intervals not exceeding five years.
- 6.1.5 If the present situation of operating with a substantial level of backlog maintenance is accepted as being managed then this is achieved by having good knowledge of what might happen and working closely to maintain the right priority order for the work that is commissioned. Where comparative decisions are made in the context of a shortfall in funds it is important to conduct conscious and recorded option appraisals / risk assessments. By creating a performance management framework, this will better enable decisions to support improvement objectives.
- 6.1.6 There are imperatives that will arise that affect the ability of Property Services to maintain the estate if there are insufficient resources. Examples that are current are the need to address asbestos problems, the introduction of DDA compliant accesses, Legionella disease and Fire Safety.

6.2 Likely need for investment re suitability

- 6.2.1 A number of schools are now unsuited to modern teaching methods and impede the Council's ability to deliver its education objectives. The main issues relate to size and location of teaching space, environmental conditions and changing curriculum expectations.
- 6.2.2 Of these schools, 4 are included in the proposed PPP scheme.
- Kinloss and Keith Primary Schools
 - Elgin Academy
 - Elgin High School

6.3 Issues related to sufficiency

6.3.1 There is a range of potential options for rationalisation of the estate and these are highlighted in section 10 of this report. Taking the 2004 functional (working) capacity against actual school roll provides an overview of those schools that currently fall under the 60% threshold. Details of the projected position by 2011 are also shown in the second part of the table. The calculation for the projection to 2011 is based on projected school population at that time against working capacity as at 2004 (it should be noted that working capacities can change year on year).

Position as at August 2004		
School	Actual Roll (2004)	Roll as percentage of working capacity
Cabrach	5	20%
St Peters	29	23%
Newmill	47	47%
Glenlivet	33	50%
East End	209	52%
Portknockie	85	57%
Projection by 2011		
School	Projected Roll (2011/12)	Projected Roll at 2011 as percentage of 2004 working capacity
St Peters	13	10%
Cabrach	6	24%
Logie	20	27%
Glenlivet	25	38%
Inveravon	19	38%
Crossroads	20	40%
Cullen	99	40%
Dyke	40	40%
Rothiemay	32	43%
Mosstodloch	133	48%
East End	200	50%
Alves	51	51%
Andersons	152	52%
St Gerardine's	232	52%
Aberlour	106	53%
Knockando	41	55%
Portgordon	69	55%
Craigellachie	42	56%
Note – All secondary schools are projected to remain above 70% by 2011 with Elgin Academy projected to be 104%		

6.4 Replacement IT (PPP)

- 6.4.1 The current schools ICT PPP (provided by ICL) contract will end in 2006. The Moray Council wishes to update IT provision and extend it to meet enhanced objectives that are emerging as part of the Education and Community Plan strategies. A strategy is being developed to enable this.

7 REVIEW AND OPTIONS

7.1 Needs and Priorities

- 7.1.1 A large number of Moray's schools date from the 19th Century and nearly all of the secondary school estate was built in the 1960's and 1970's. Dates of construction for each school, where known, are given in Core Fact Sheet 2.
- 7.1.2 Over the last five years, the Council has carried out significant renovation programmes in the following schools:
- | | |
|----------------------------------|------------|
| • Forres Academy | £1,532,000 |
| • Lossiemouth High School | £1,865,000 |
| • Speyside High School, Aberlour | £840,000 |
| • Aberlour Primary | £300,000 |
- 7.1.3 Condition surveys carried out in 2004 indicate that £6.35m is required to address maintenance needs over the next 3 years.
- 7.1.4 Estimates generated from the PPP proposals suggest that £95m is required to bring schools up to a good standard of repair. Further work will be carried out to test this assumption through the option appraisal process.
- 7.1.5 In relation to the condition of schools, the major problems identified are:
- unreliable heating systems;
 - leaking flat roofs;
 - poor windows;
 - out-dated electrical and fire installations;
 - out-dated fittings in practical areas such as Home Economics, Science, PE and Performing Arts.
- 7.1.6 Suitability is a significant issue for the Council. Ideally the entire school estate should meet 21st Century standards. In addition to meeting national agendas for reducing class sizes and the drive for vocational learning, schools should also meet pupils, teachers and community expectations for quality and facilities. Moray Council has yet to establish its criteria for a 21st Century school and suitability surveys have to date focused upon a benchmark of 'satisfactory' as defined under Core Fact 5 (Suitability).
- 7.1.7 The Council recognises that the estate does not meet current accessibility requirements and energy efficiency standards. Under the PPP outline business case, capital and running costs for options were produced and net present value costs were produced for each option over a 30-year period. A similar approach will be taken for prioritising future capital investment so ensuring that whole life procurement decisions are made.
- 7.1.8 The Council's expenditure on school capital projects in recent years has been in the region of £1.6m. It is clear that The Moray Council is therefore not in a financial position to bring its school estate up to a modern standard with current finances.

7.2 Property objectives and delivery mechanisms

7.2.1 Challenges Identified under Best Value

- To develop more efficient management information systems for effective administration, data collection and analysis;
- To improve communication between schools, parents and School Boards;
- To broaden visions about different ways of service delivery.

7.3 Strategic options

7.3.1 Schools lie at the heart of the community, they represent a considerable investment by the council and in designing new or upgrading existing schools the following issues need to be taken into account. The council has concluded that the primary objectives of the project, which the preferred option would need to address, are as follows:

- a. Buildings need to be fit for purpose;
- b. The fabric needs to be of good quality, easy to maintain and offering security for pupils, staff and other users;
- c. Programmes of ongoing maintenance must be incorporated into a funding strategy;
- d. Accommodation needs to offer scope for whole class learning, individual and group-work (the increasingly practical nature of the curriculum across most subjects needs to be taken into account).
- e. Information and communication technology needs to be further embedded across the curriculum);
- f. Good health is a fundamental need for effective learning and the schools' infrastructure must incorporate:
 - adequate indoor and outdoor sporting facilities
 - facilities that encourage the take up of school meals
 - facilities which allow for community use of school buildings
- g. Since parents are critical to the success of the child, adequate facilities need to be incorporated to allow:
 - parents easy access to the school
 - opportunities to participate in family learning
 - opportunities to contribute to the life and work of the school.
- h. Education is also about preparing young people for life, working life, leisure, parenthood and citizenship. It is, therefore, important that schools offer facilities, which will provide for vocational skills and education as well as supporting a range of activities including sport, music, drama, art and community development.
- i. Since schools, proportionate to size and sector, will provide a range of facilities which are equally appropriate and necessary for community

learning, the design of schools should accommodate access out of school hours for the community.

7.4 Financial review and consideration of potential options

Financial performance of the school estate (Core fact 6)

- 7.4.1 Moray's school estate is in need of major investment to address statutory requirements, replacement of elements, which have reached the end of their life and sufficiency and suitability issues. The overall capital requirement to refurbish the estate is estimated at £95m. This is broken down into £6.3m in relation to condition and circa £89m in relation to dealing with suitability and sufficiency.
- 7.4.2 The Council is developing a range of options for a schools PPP project. The pattern of declining primary school rolls led to consideration under the exploratory options for the PPP project of five or six situations where mergers would help to create a more affordable estate in the medium term. Another option to explore for some remote rural schools may be to discuss with neighbouring Councils, the potential for cross border movement of pupils to maximise capacity and offer best value.
- 7.4.3 Capital and running costs for PPP options were produced and net present value costs were considered over a 30-year period. The SEMP forward strategy will have to take account of the preferred PPP option selected and build on the methodology used for assessment and financial planning.

7.5 Revenue and Capital financing context

Capital

- 7.5.1 Moray's capital programme for the next 3 years is described below. The amounts in brackets are the capital spends for Educational Services. It should be noted that the Capital Plan is currently being reviewed and extended to 2007/08 and should be finalised in February 2005.

2004/05	£13.075M	(£2.200M)
2005/06	£12.44M	(£3.243M)
2006/07	£12.107M	(£2.623M)

This capital spend is likely to continue into the future within the constraints of annual prudential code borrowing of £9M.

- 7.5.2 Within the capital spend for education, £1.317M has been set aside specifically for the school estate management plan for 2004/05 rising to £1.66 for 2005 to 2007. The remaining expenditure is either used to fund service improvements, the Council's Education ICT PPP or further school estate work.
- 7.5.3 Within the overall Council capital budget, further amounts have been set aside for the **corporate asset management programme**. Educational services is part of this programme. The amounts available for this programme over 3 years are:

2004/05	£0 M	2005/06	£1.2M	2006/07	£2.2M
----------------	-------------	----------------	--------------	----------------	--------------

- 7.5.4 Educational services will be competing with other capital priorities including the roads maintenance programme and flood alleviation schemes (a major priority for the Council) and other issues arising from the Corporate Asset Management Review.
- 7.5.5 Revenue spend on the school estate is £1.127m per annum split almost equally between response and planned work. The level of planned backlog maintenance is estimated at £6.3M over the next 5 years and consequently there is a shortfall of circa £3.48M.
- 7.5.6 Moreover, a revenue allocation of £1M in 2004/05 rising to £2M over the following two years has been included in the Council's three-year financial plan for corporate asset maintenance. A detailed report has been provided to Members on the review of the recurring investment requirement in the assets used by the Council to deliver services. The report indicates that a sum of £22M is needed over 10 years simply to maintain the Council's existing school estate assets. The annual requirement is £3M in years 1 to 4 and £2M for years 6 to 10.

7.6 Financial Appraisal of existing situation

- 7.6.1 As has already been highlighted, Outline Business Casework was carried out in 2000 for the PPP project, which identified an investment of £95M to provide a modern school estate for the Council. This figure was arrived largely as a desktop exercise and not survey based so its use should be interpreted with a great degree of caution.
- 7.6.2 The potential PPP solution is estimated to address £37m of this modernisation requirement.
- 7.6.3 The various other factors relevant to the decision process have been used to attempt to quantify the funding gap for the rest of the school estate assuming the PPP project goes ahead. These factors are shown in the 10-year resource needs and funding requirement plan contained in Appendix 2 section 13.1 on page 63 along with accompanying notes.
- 7.6.4 It can be seen that a funding shortfall still exists over the 10-year period of £49M. Some of the options for addressing this shortfall are explored further in the next section.

Again caution should be exercised when reading the financial plan because many of the figures are only available in global terms. Where the timing of costs and funding is known then the allocation to appropriate years is made.

7.7 Potential funding options for the Council

- 7.7.1 The following options are suggested as potential solutions to the funding gap. However, they are tentative at this stage and require to be fully explored as part of the formal option appraisal exercise involving Members and senior Council officers to start in 2005.

<u>Option</u>	<u>Description</u>	<u>Applicability in Moray</u>
1. Do nothing or baseline	Leave situation as it is	Will result in a potential deterioration of the school estate, the retention of 19 th and 20 th century accommodation to address 21 st

		century needs and significant over capacity in the primary sector.
2. a) PPP2	Another PPP project assuming the first is successful	PPP projects usually deliver when new build and large-scale refurbishment are delivered in a well-managed cluster of works. Quite how the remainder of the school estate could be addressed after an initial PPP would need careful investigation.
2. b) Internal PPP	Not for Profit arrangement	The profits normally made by the private sector partner (typically 15-20%) are recycled back into the system allowing additional investment to be made. Quite how the remainder of the school estate could be addressed after an initial internal PPP would need careful investigation.
3. Funding by conventional means	Prudential Borrowing and capital receipts	By utilising a program of school mergers and combining that with majority access to the corporate asset management plan revenue-funding provision, then substantial sums could be borrowed. This would need the school estate to be acknowledged as a main priority of the Council over the next 10 years. Funding could also be accessed through the amounts set aside in the capital plan for corporate asset management. A balanced assessment would need to be made against other Council assets and investment priorities.
5. Additional funding from SEED through the school improvement fund	Direct bid through the school estate management plan	It has been acknowledged that £2bn will be made available over the next 10 years to address Scotland's school estate. While clearly per capita considerations will be a significant driver in the allocation of funding, funding based on need should still be possible through the school estate management plan process.

7.7.2 It should be noted that Schools have been highlighted by the Council as a major capital plan investment area (source: report to service development group on 3rd November 2003). It is likely that investment in the school estate will be a major consideration for the next three-year budget currently under preparation. A view will need to be taken by Members at that point as to what level of investment should be committed to the school estate.

7.7.3 The Council is already taking steps to action areas of priority such as the school estate by increasing funding through the Council Tax.

7.7.4 There are a number of significant issues out-with Council control e.g. additional capital grants from the Scottish Executive and additional level playing field support for a further PPP that will impact on funding options and the capital plan.

8 METHOD TO DEVELOP PRIORITIES

8.1 School Estate Management Plan – Overview

- 8.1.1 The School Estate Management Plan was updated between April and November 2004. The plan is set in the context of national and local priorities, The Council's Corporate Plan, The Community Plan, Educational Services Improvement Plan the Council's Asset Management Plan and the Scottish Executive's National Priorities for Learning.
- 8.1.2 The SEMP takes account of the critical issues identified in each of the 6 core facts. The first stage in producing a programme for action has been to develop a list of schools showing where each establishment falls in relation to others. This priority list (contained in Appendix 3 section 14.1 on page 65) is the starting point for developing a programme of action. Elgin Academy, Elgin High, Kinloss Primary and Keith Primary were not assessed and are not included in the list as they fall within the PPP programme for development. The methodology used to develop the list is described in detail below.

8.2 Methodology

Introduction

- 8.2.1 The methodology is described in detail in order that it is clear, open and transparent. Methods that have been used are designed to be objective and robust, however they will be modified and refined over time as a result of improved information and feedback from key stakeholders.
- 8.2.2 A wide range of information relating to each of the core facts was gathered in order to develop the priorities. Both qualitative and quantitative methods were used to assess specific aspects. Finally, a weighting and ranking process was developed to enable each school to be given a score resulting in a provisional priority list.
- 8.2.3 Information was gathered from a range of sources including Educational Services, Corporate Services, Estates Section, Finance Department and Property Services. This information was developed either from existing data or specific surveys were carried out to enable assessments to be made.
- 8.2.4 Three of the six core facts are considered to be of particular importance. They are Condition (Core Fact 3), Sufficiency (Core Fact 4) and Suitability (Core Fact 5) of the school estate. The weighting and ranking exercise therefore is biased towards these elements. Three other aspects, taken from the core facts are also included in the weighting and ranking process. Firstly, the number of school buildings that a school comprises (Core Fact 1 – Extent of school estate). Secondly, life-cycle management in terms of the projected value of repairs and maintenance over the next 5 years (Core Fact 3 – Condition of the school estate) and thirdly, energy costs (Core Fact 6 – Financial Performance of the school estate).
- 8.2.5 Core Fact 2: Value of the School Estate is concerned with the gross replacement value, accumulated depreciation and net book values of each school. This is important financial information that supports the overall asset management process but it does not form part of the weighting and ranking exercise.

8.3 Quantitative and Qualitative Methods

- 8.3.1 Key quantitative data such as, costs and expenditure, valuations, measurements and school rolls, were the primary elements in the information gathering phase. From this data it was possible to carry out calculations and projections. Qualitative data was used to support the whole process mainly through a web survey, Community Planning road-shows and discussions with Head Teachers. Detailed surveys were also carried out for building condition and suitability.
- 8.3.2 Property Services undertook a detailed condition survey of each school considering essential elements e.g. roofing, electrical installation, heating, internal decoration, windows and external fabric. Within each of eighteen essential elements a range of secondary aspects were assessed. This data was captured on a tailored database and from this it was possible to calculate the internal floor area categorised as either A (Good), B (Satisfactory), C (Poor) or D (Bad). This information was then used to give an overall rating (A-D) to each school. In addition, maintenance requirements for each aspect were costed and prioritised over a five year period (year 1, year 2 and years 3 to 5).
- 8.3.3 Educational Services carried out a suitability exercise in all schools. Assessment Teams rated a variety of critical elements within each school on a categorisation A-D. These were evaluated and each school was given an overall ranking A-D. These results were checked with the Head Teacher.
- 8.3.4 School roll forecasts are reviewed annually taking account of a range of information including the SEED census, projected housing development as well as demographic trends. A report is prepared annually for Educational Services Committee on Primary School Capacities. The working capacity of a school is the maximum number of pupils that a school can accommodate in any one year taking into account the organisational needs of the school and in particular the age distribution of pupils. The physical capacity of a school is the maximum number of pupils that could possibly be accommodated in the building. The physical accommodation of a school would only change if accommodation is required for other approved purposes such as SEN, pre-school education and other statutory educational purposes.

8.4 Validity and Reliability

- 8.4.1 The Condition survey used a tried and tested method of assessment carried out by a team of building inspectors. Consistency was maintained through cross-referencing and checking results. Quantity surveying methods were used to cost particular elements of repair and maintenance.
- 8.4.2 Pilot suitability surveys were carried out in both Secondary and Primary sectors. This approach ensured consistency and reliability and enabled adjustments to be made prior to rolling out the programme. In terms of the secondary school survey, validity was maintained by ensuring each assessment team included a member of secondary school senior management team. The primary school survey teams included two recently retired Head Teachers.
- 8.4.3 The assessment of sufficiency (capacity) was calculated using the 2004 school roll as a percentage of working capacity. The Moray Council has established a baseline of 60% as being an acceptable level. Using this

baseline enables both under capacity and over capacity to be considered when allocating the ranking score. School roll forecasting is based on tried and tested methods. However, it should be noted that adjustments may require to be made following the outcome of the findings from the demographic consultant assessing and reviewing the GRO projections.

- 8.4.4 A key aspect of the suitability survey was ensuring that Head Teachers or Deputies were involved in initial discussion prior to the survey. Survey results were sent to Head Teachers for comment along with a copy of the summary notes taken at the initial meeting. Feedback from Head Teachers was then incorporated by making changes to the data on the spreadsheet and updating the summary notes.

8.5 Weighting and Ranking

- 8.5.1 A weighting and ranking process was selected as the most appropriate method for producing a prioritised list. A weighting factor ranging from 1 to 5 was applied to each of the chosen criteria as a measure of their importance:

- Condition – Weighting factor 5
- Sufficiency – Weighting factor 5
- Suitability – Weighting factor 5
- Repairs and maintenance costs over 3 years – Weighting factor 3. This relatively high weighting supplements the condition survey weighting and ensures that life-cycle issues are more fully included.
- Extent of school estate (number of buildings) – Weighting Factor 2. This weighting should be considered in conjunction with the suitability of a school. The suitability survey does take account of classroom locations but it was felt important to include this additional element to add more weight to those schools that have more than one building on site as it is not desirable to have 'remote' classrooms and teaching areas. The number of buildings will be considered within the options appraisal process giving this aspect a higher profile at that point.
- Energy costs – Weighting factor 1. This weighting reflects the need to include an element of financial performance of the building. Its importance in relation to the other factors is relatively lower. Energy costs will also be considered in the options appraisal process giving this aspect a higher profile at that point.

- 8.5.2 Having allocated a weighting to each of the elements, a ranking score ranging between 1 and 10 was given to each school in relation to its position within each element. For example a school with a rating of A (Good) for overall condition of the building will score 1 whereas a school with a rating of D (Bad) will score 10. The ranking is then multiplied by the weighting to obtain an overall score for that element. The process is repeated for each element and all scores are finally added together. The total score reflects the position of a school in the priority list. The higher the score, the further up the list the school will be.

- 8.5.3 The methodology for ranking scores is contained in Appendix 6 section 17.1 on page 74.

- 8.5.4 The weighting and ranking process completes the first stage in developing the priority programme for action. The second stage involves banding or

grouping schools into phases for action. Part of this second stage also includes capturing all schools with a high score in any one of the three main elements – condition, sufficiency and suitability to ensure that they are included in the first phase programme for action. First phase schools will then go through an options appraisal process and this will result in an implementation plan that will be progressed over an agreed timetable.

8.4. Common Issues

8.5.5 Both the suitability and condition surveys identified a range of issues that were common to many schools. Rather than being tackled school by school, these issues have been considered as estate issues and will be addressed separately within the plan. Common issues are:

- Door Security – improvements need to be made to security arrangements particularly in those schools that do not have full time clerical / reception staff.
- Fire Building safety – A programme for installation of smoke detection / sprinkler systems in schools needs to be assessed.
- Ventilation, heating control and solar gain – many schools suffer from one or more of these problems with the result that at certain times, teaching areas can become very hot, too cold or the air circulation is poor.
- Toilets – A number of schools require pupil toilets to be upgraded to improve hygiene and the general environment. In addition, many of the medium to larger Primary and some Secondary schools require additional and improved toilet facilities for staff.
- Changing facilities – There is no discrete and dedicated space for changing for sporting activities in primary schools. Schools do get around the problem but changing in classrooms is not ideal. There are also management issues and protocols to consider in this aspect.
- Kitchens – Some Primary schools require kitchen upgrades to provide improved layout, storage, preparation space and service delivery areas. A rolling programme of upgrade needs to be produced and costed. The rating of kitchens (A-D) is contained in the suitability survey.
- Dining and hall facilities – Dining facilities in many schools are cramped and few have separate facilities as recommended with Hungry for success. Whilst it is unlikely that dedicated facilities will be provided, improvements do need to be made.
- Social areas for pupils – Many secondary schools identified the need for improved social areas for pupils. This aspect requires further assessment.
- Vocational teaching areas – The national agenda identifies the need for creating opportunities for vocational teaching. The impact of this requires careful consideration.
- Access – A full survey has been carried out in relation to access to buildings (DDA etc). A programme of improvements for all council premises will be put in place as part of the Council's overall asset management plan. Schools will be included in this process but in addition, there remains in place a budget to upgrade facilities on the basis of need.

- Staff facilities – There are increasing numbers of staff in schools with the consequence that many staff rooms are now too small. This is an important priority to address in terms of morale and motivation.

8.6 Consultation process

8.6.1 The consultation process involves all stakeholders and is an integral part of the School Estate Management Plan. The road-shows and web survey are mentioned earlier in this document and consultation with Head Teachers, other key officers and organisations is ongoing.

8.6.2 The next significant stage in the process will be to consult widely as part of the options appraisal process. The Educational Services Improvement Plan (2004-2005) Aim 3 is specifically concerned with 'Providing safe, welcoming and attractive learning environments. Priority 3.1 – requires Educational Services to finalise the strategy on Estate Management Planning to include over capacity in the Primary Sector. To address this priority Working Group 9 are committed to:

- Completing the school estate management plan by December 2004.
- Conducting an information sharing and consultation exercise on estate management and over capacity between January and March and September and October 2005.
- Submitting proposals for estate management including over capacity following the information and consultation exercise.

9 PRIORITIES

9.1 Programme for action

9.1.1 The programme for action has been determined using the methodology described in section 8.

9.1.2 The table below identifies the highest scoring schools i.e. the schools with the most pressing need. In addition and in order to address the three critical issues (suitability, sufficiency and condition), schools which have scored highly in any one of these elements have been included in the list.

9.1.3 Maintenance costs are also highlighted where projected planned maintenance exceeds £200,000 over the next 5 years.

School	Overall score	Suitability	Condition	Sufficiency by 2011	Maintenance 1- 5 yrs
St. Peters Primary	131		D	10%	
Buckie High School	130	C	D	80%	£465,765
Logie Primary	129		C	27%	
Rothiemay Primary	128	C	C	43%	
Forres Academy	123			92%	£507,250
Keith Grammar School	114	C	C	81%	£392,095
New Elgin Primary	113	C	C	78%	£367,645
Milne's High School	113	C	D	72%	£434,155
Portgordon Primary	111	C		55%	
Cluny Primary	110	C		62%	
East End Primary	110		C	50%	
Tomintoul Primary	107		D	60%	
Mosstodloch Primary	107		C	48%	£240,990
Alves Primary	104		D	51%	
Cullen Primary	102			40%	
Anderson Primary	102		C	52%	
Crossroads Primary	102			40%	
Glenlivet Primary	101			38%	
Botriphnie Primary	100	C		64%	
Dyke Primary	100			40%	
Cabrach Primary	99			24%	
Inveravon Primary	99			38%	
Craigellachie Primary	98			56%	
Knockando Primary	97			55%	
Speyside High School	90	C		76%	£472,060
Bishopmill Primary	90	C		82%	
St. Gerardine's Primary	89			52%	£278,225
Applegrove Primary	88			60%	
Hythehill Primary	87		C	80%	
Portessie Primary	84		C	85%	
Burghead Primary	80	C		74%	
Lossiemouth High School	77			85%	£234,725
Greenwards Primary	70			72%	£220,700
Aberlour Primary	68			53%	

- 9.1.4 With 34 schools identified as requiring action, together with a range of common issues as detailed in Section 8, it is evident that any plan of action will have to be phased.
- 9.1.5 In addition many of the actions required to address the problems affecting the school estate will be undertaken over different time frames. Complex issues are likely to take considerable time (minimum 3 years) to resolve. More straightforward problems can be dealt with quickly. For this reason, any plan of action will also be sub divided into short, medium and long term time frames.
- 9.1.6 A range of actions is already in place for five of the schools in the top 10. Details of this together with the overall planned programme of action are specified in Section 11.

9.2 Phasing

- 9.2.1 When determining the phasing of priorities within the school estate for action, the following factors were taken into account:
- The relative urgency of issues
 - Whether issues could be grouped
 - The volume of issues that could be dealt with at any time
- 9.2.2 Taking these factors into account, the following phasing is proposed:

Phase 1

- Buckie High School.
- Primary Schools with a projected roll of less than 60% capacity by 2011.
- Schools categorised as D for condition.
- Establishing rolling programmes to address common issues of door security, fire safety, ventilation, toilets, access and dining.

Phase 2

- Schools categorised as C for suitability.
- Schools categorised as C for condition.
- Schools categorised as having high maintenance requirements (in excess of £200,000 over 5 years).
- Establishing rolling programmes to address common issues of changing facilities, social areas, vocational teaching areas and staff facilities.

10 OPTIONS

10.1 Option Appraisal

10.1.1 Each of the schools and issues in the action programme will be subject to an option appraisal. The Scottish Executive has provided examples of approaches that may be used in this process. The high levels of investment associated with the school estate management planning process must be underpinned by rigorous, consistent and appropriate appraisals.

10.1.2 Option appraisal is a technique for setting objectives, creating and reviewing options and analysing their relative costs and value. The process should provide a value for money solution that meets the objectives of the project. Option appraisal should also be proportionate to the proposals in question.

10.1.3 A systematic approach will be used that focuses on the following broad process:

- Defining objectives
- Developing options
- Gathering information
- Assessing options
- Analysing options
- Consultation
- Selection of preferred option
- Reporting

10.1.4 The size and nature of the project will determine the extent of work required at each stage. In practice, some of the stages may take place simultaneously.

10.1.5 The first and perhaps the most significant stage in the process is to define a clear set of objectives. Objectives are informed by reviewing data and information already collected and taking account of wider educational and council strategies and policies.

10.1.6 Once objectives have been defined, different approaches or options can then be considered as how to achieve them. The range of options depends on the nature and scale of the objectives. Broadly, options are likely to include:

- Doing nothing – maintaining existing provision or level of service
- Mergers - of two or more schools
- Extensions – increasing space to meet requirements
- Refurbishment – internal refurbishment and alterations to meet requirements:
 - Major repairs and maintenance
 - Replacement school on same site
 - Replacement school on alternative site
- Asset utilisation – reducing over capacity by allocating space in schools for other Council department / services and partner agencies

- School closures

10.1.7 Once a suitable shortlist of options has been created, further information will be gathered on each enabling a rigorous assessment of the options.

10.1.8 In order to assess each option, the relevant costs and benefits will be valued and the net benefits or costs calculated. The results will then be used to compare options and select the best.

- Estimating costs
- Estimating benefits
- Discounting – taking account of different time periods and converting costs to present values
- Risk, uncertainty and optimism bias

10.1.9 Once options have been assessed, they will be analysed in a consistent way by using a weighting and scoring process for non-financial or qualitative costs and benefits similar to that used to produce the initial priority list.

10.2 Consultation

10.2.1 Throughout the course of the option appraisal, there will be extensive consultation with those who have an interest in the outcome. The consultation time frame has already been established by Working Group 9 (refer to 8.6.2 above on page 39).

10.3 Final Selection and implementation

10.3.1 The final selection of the preferred option will take account of the financial and non-financial factors. It is anticipated that the implementation programme will commence in early 2006, however, work is already scheduled to address some specific needs in 2005. Section 11 sets out the overall implementation plan.

10.4 Broad Costs

10.4.1 The following table provides general, indicative costs for small, medium and large primary and secondary schools for:

- New build
- Major Extensions
- Major Refurbishment
- Minor refurbishment (internal only)

10.4.2 The costs should be interpreted with caution and have been prepared using the Building Cost Information Service (BCIS). Although they are intended as very approximate estimates, figures are prepared from actual costs obtained from submitted projects similar in nature to those that might be implemented in Moray.

10.4.3 The calculations are based on the existing GIA for a small, medium or large primary or secondary school. This was done because, whilst school rolls are

falling, additional accommodation may be required to meet 21st Century standards. In other words, a nil effect on gross internal floor area.

10.4.4 Demolition costs have been included in new build projects on the basis that a new school will be built on the same campus as the existing building. These costs would not therefore be incurred in new buildings were developed on greenfield sites.

10.4.5 Planning fees are based on a cost of £240 per 75 square metres of build up to a maximum fee of £12,000. Building Control fees are estimations only.

10.4.6 Professional fees are based on a rule of thumb calculation as follows:

- Contract value – up to £1m – 12% fee
- Contract value – of between £1m and £2m – 10% fee
- Contract value – of between £2m and £4m – 8% fee
- Contract value – of between £4m and £6m – 6% fee
- Contract value – of over £6m – 5% fee

New Build	Capacity	GIA	Build	Demolition	Planning Fee	B/Control	Design Fee	Total
Large Primary	530	3,296	5,026,400	165,000	10,600	12,100	311,500	5,525,600
Medium Primary	265	1,600	2,320,000	80,000	5,120	7,000	116,000	2,528,120
Small Primary	100	770	1,116,500	60,000	2,464	3,500	111,650	1,294,114
Large Secondary	1,100	11,729	15,834,150	600,000	12,000	34,250	821,700	17,302,100
Medium Secondary	760	8,830	11,920,500	450,000	12,000	29,000	596,025	13,007,525
Small Secondary	600	6,695	9,038,250	325,000	12,000	20,400	468,200	9,863,850
Extension	Increase by	GIA	Build	Demolition	Planning Fee	B/Control	Design Fee	Total
Large Primary	10%	330	535,600	0	2,000	3,000	64,272	604,872
Medium Primary	10%	160	260,000	0	1,500	3,000	31,200	295,700
Small Primary	10%	77	125,125	0	1,000	2,500	15,015	143,640
Large Secondary	10%	1,173	1,730,028	0	8,000	10,000	173,003	1,921,030
Medium Secondary	10%	883	1,302,425	0	7,000	9,000	130,243	1,448,668
Small Secondary	10%	670	987,513	0	2,500	3,500	118,502	1,112,014
Major Refurb. / Upgrade	Assume	GIA	Upgrade	Demolition	Planning Fee	B/Control	Design Fee	Total
Large Primary	Whole school	3,296	3,296,000	0	10,547	8,000	263,680	3,581,523
Medium Primary	Whole school	1,600	1,600,000	0	5,120	4,500	160,000	1,771,220
Small Primary	Whole school	770	770,000	0	2,464	3,500	92,400	869,134
Large Secondary	Whole school	11,729	11,166,008	0	12,000	29,000	550,000	11,768,737
Medium Secondary	Whole school	8,830	8,406,160	0	12,000	18,000	450,000	8,894,990
Small Secondary	Whole school	6,695	6,373,640	0	12,000	14,000	360,000	6,766,335
Minor Refurb. / Upgrade	Assume	GIA	Upgrade	Demolition	Planning Fee	B/Control	Design Fee	Total
Large Primary	Whole school	3,296	1,812,800	0	0	0	181,280	1,994,080
Medium Primary	Whole school	1,600	880,000	0	0	0	105,600	985,600
Small Primary	Whole school	770	423,500	0	0	0	50,820	474,320
Large Secondary	Whole school	11,729	5,278,050	0	0	0	316,683	5,594,733
Medium Secondary	Whole school	8,830	3,973,500	0	0	0	238,410	4,211,910
Small Secondary	Whole school	6,695	3,012,750	0	0	0	241,020	3,253,770

11 IMPLEMENTATION PLAN

11.1 Purpose and Objectives

- 11.1.1 The overarching strategy of Moray Council is to improve the built environment to support the delivery of services that focus on meeting the needs of children and communities in the 21st Century.
- 11.1.2 This ambition is underpinned by Educational Services commitments to raise achievement and attainment, to develop and implement improvements to the Educational Services Estate and to target resources towards need and improvement.
- 11.1.3 Section 10 identifies the priority actions identified to help meet these objectives. Their phasing, together with the tasks associated with them and with the time frames over which they will be progressed, are described in the implementation plan laid out in the following pages.
- 11.1.4 It will be noted that the level of detail for the short-term time frame is greater than that for the medium and longer-term time frames. This is because many actions for later time frames will only become apparent following the completion of option appraisals and consultation.
- 11.1.5 In addition to the actions identified within the Implementation Plan, a number of projects which are complementary to the School Estate Management Plan have already been committed to:
- Forres Academy – SEN extension with a second story to include 4 general classrooms. This will meet the Council's commitment to ensuring level 5 Special needs bases are in place in each secondary school. The additional classrooms will address the over capacity issue and provide the opportunity to remove the hutted accommodation from the site.
 - Bishopmill Primary – The development of a sports hall and 4 classrooms will address both the suitability and capacity issues. The existing huts would be removed from the site.
 - Lossiemouth High School – SEN extension that will meet the Council's commitment to ensuring level 5 Special needs bases are in place in each secondary school.
 - Rothiemay Primary School – The replacement of a life expired kitchen and dining facility with a servery.
 - East End Primary School – Use of surplus school accommodation to house archives.
- 11.1.6 A schools PPP project including 4 schools (Elgin Academy, Elgin High School, Kinloss Primary and Keith Primary) has been initiated and building works are due to be completed by March 2008.
- 11.1.7 A strategy for replacing the schools ICT contract is being developed and is anticipated to be complete by February 2005.

11.2 Implementation Plan

11.2.1 The Implementation Plan Summary below highlights the actions over the short-term, covering the period January 2005 to March 2006.

11.2.2 The full Implementation Plan is detailed in the table following the Summary.

Objective	Time Frame
Bring Schools PPP to financial close	Jan 2005 to March 2006
Consultation on School Estate Management Plan	January 2005 to April 2006
Finalise Schools ICT Strategy	February 2005
Develop formulas for calculating secondary and primary school capacities	February 2005 to June 2005
Develop suitability criteria for 21 st century schools	September 2005
Option appraise 'Phase 1' Projects (Buckie High, Category D Condition and Sufficiency issues)	August 2005 to October 2005
Progress 'Phase 1' Projects	October 2005 to December 2005
Update School Estate Management Plan	December 2005
Review Management Information System for energy consumption and costs	January 2006 to March 2006

SHORT TERM Implementation Plan (January 2005 to March 2006)				
Objectives	Actions	Time frame	Lead Officer/s and Organisation	Notes (incl. links and assumptions etc.)
Schools PPP - bring project to financial close	<input type="checkbox"/> Invitation to negotiate issued <input type="checkbox"/> Select preferred bidder <input type="checkbox"/> Financial close <input type="checkbox"/>	January 2005 September 2005 March 2006	PPP Project Manager and PPP project Board	
Undertake Moray wide consultation on School Estate Management Plan	<input type="checkbox"/> Initiate consultation <input type="checkbox"/> Consultation completed	January 2005 April 2005	Working Group 9 Working Group 9	
Finalise replacement schools ICT strategy	<input type="checkbox"/> Finalise replacement schools ICT strategy	February 2005	Quality Improvement Officer (D.McD)	
Develop new formula for calculating secondary school capacities	Review existing formula and update to reflect current issues	February to March 2005	Educational Resources Manager Educational Resources Officer A member of sec. School SMT	The new formula needs to feed into the options appraisal exercise
Develop new formula for calculating primary school capacities	Review existing formula and update to reflect current issues	April – June 2005	Staffing Officer Educational Resources Manager A primary School Head Teacher	The revised formula needs to feed into the options appraisal exercise

SHORT TERM Implementation Plan (January 2005 to March 2006)				
Objectives	Actions	Time frame	Lead Officer/s and Organisation	Notes (incl. links and assumptions etc.)
Develop suitability criteria for 21 st Century Primary and Secondary Schools	<input type="checkbox"/> Establish 'satisfactory' bench mark for 21 st Century schools	September 2005	PPP Project Manager Working Group 9	
Initiate 'Phase 1' Projects	<input type="checkbox"/> Option appraisal – Buckie High completed	August 2005	Educational Resources Manager	
	<input type="checkbox"/> Option appraisal – Category D condition schools completed	August 2005	Educational Resources Manager	
	<input type="checkbox"/> Option appraisal – Sufficiency issues completed	October 2005	Working Group 9	

SHORT TERM Implementation Plan (January 2005 to March 2006)				
Objectives	Actions	Time frame	Lead Officer/s and Organisation	Notes (incl. links and assumptions etc.)
Progress 'Phase 1' Projects	<ul style="list-style-type: none"> ❑ Establish rolling programmes for improvements in door security, fire safety, ventilation, toilets, access and dining 	October 2005	Educational Resources Manager	
	<ul style="list-style-type: none"> ❑ Finalise proposal for Buckie High School for inclusion within capital programme / external funding bid 	October 2005	Educational Resources Manager	
	<ul style="list-style-type: none"> ❑ Develop preferred proposals for addressing sufficiency issues for inclusion within capital programme / drawing down external funding 	December 2005	Educational Resources Manager	
Update School Estate Management Plan	<ul style="list-style-type: none"> ❑ Update information, review priority list and phasing ❑ Progress report and submit updated plan to committee 	December 2005	Educational Resources Manager	
Review current management information system for energy consumption and costs	<ul style="list-style-type: none"> ❑ Review current system ❑ Develop new data base to capture up to date information ❑ Consider introducing water meters 	January – March 2006	Head of Estate Services Finance Department	

MEDIUM TERM Implementation Plan (within 3 years)				
Objectives	Actions	Time frame	Lead Officer/s and Organisation	Notes (incl. links and assumptions etc.)
Schools PPP building works commence	<input type="checkbox"/> Initiate building works on first phase PPP schools	April 2006	PPP Project Management Board	
Implement 'Phase 1' Projects	<input type="checkbox"/> Provide specifications to property Services <input type="checkbox"/> Carry out statutory obligations	From April 2006	Educational Resources Manager Working Group 9	
Implement 'Phase 1' rolling programmes	<input type="checkbox"/> Initiate appropriate small scale projects within rolling programmes	From April 2006	Educational Resources Manager	
Review development of plan	<input type="checkbox"/> Implement any changes from December 05 review <input type="checkbox"/> Develop performance measures	From April 2006 July 2006	Working Group 9 / Educational Resources Manager Educational Resources Manager	Undertake in liaison with Property Services
Schools ICT replacement strategy complete	<input type="checkbox"/> Finalise Schools ICT replacement strategy	April 2006	Quality Improvement Officer (D.McD)	
Schools ICT replacement strategy implementation	<input type="checkbox"/> Implement Schools ICT replacement strategy	June 2006	Quality Improvement Officer (D.McD)	

MEDIUM TERM Implementation Plan (within 3 years)				
Objectives	Actions	Time frame	Lead Officer/s and Organisation	Notes (incl. links and assumptions etc.)
Implement new energy management information system	<input type="checkbox"/> Implement new system	September 2006	Head of Estate Services Finance Department	In conjunction with Educational Resources Manager
Update School Estate Management Plan	<input type="checkbox"/> Update information and review priority list and phasing	December 2006	Educational Resources Manager	
Initiate Phase 2 projects	<input type="checkbox"/> Option appraisal – Category C condition schools completed	January 2007	Educational Resources Manager	
	<input type="checkbox"/> Option appraisal – Category C suitability schools completed	January 2007	Educational Resources Manager	
	<input type="checkbox"/> Begin review of rolling programmes for possible inclusion - changing facilities, social areas, staff facilities	January 2007	Educational Resources Manager	
Review development of plan	<input type="checkbox"/> Implement any changes from December 2006	From April 2007	Working Group 9 / Educational Resources Manager	

MEDIUM TERM Implementation Plan (within 3 years)				
Objectives	Actions	Time frame	Lead Officer/s and Organisation	Notes (incl. links and assumptions etc.)
3 year – Major review of School Estate Management Plan	<input type="checkbox"/> Initiate data gathering for update of core facts	From April 2007	Property Services Working Group 9	
	<input type="checkbox"/> Analyse information, review performance and prepare new plan	From October 2007	Property Services Working Group 9	
	<input type="checkbox"/> Finalise reviewed plan	From December 2007	Educational Resources Manager	

LONG TERM Implementation Plan (3 – 10 years)				
Objectives	Actions	Time frame	By whom	Notes (incl. links and assumptions etc.)
Schools PPP – complete build	<input type="checkbox"/> Complete build on schools PPP project	March 2008	PPP Project Management Board	
Implement reviewed School Estate Management Plan	<input type="checkbox"/> Progress any approved phase 2 projects and review progress	From April 2008	Working Group 9 / Educational Resources Manager	

LONG TERM Implementation Plan (3 – 10 years)				
Objectives	Actions	Time frame	By whom	Notes (incl. links and assumptions etc.)
Update School Estate Management plan	<input type="checkbox"/> Regular updates with major reviews every 3 years	From December 2008	Educational Resources Manager Working Group 9	

12 APPENDIX 1

12.1 Core Facts Data Summary Sheets 1- 6

- Core Fact 1 – Extent of School Estate
- Core Fact 2 – Value, Age and Build Type
- Core Fact 3 – Condition
- Core Fact 4 – Sufficiency
- Core Fact 5 – Suitability
- Core Fact 6 – Financial Performance – Energy costs are based on 2002/03 figures.

12.2 Extent

School name	Number of Buildings	No. of Sites	Shared Campus
Aberlour P S	1	1	0
Alves P. S.	School + separate hall	1	0
Anderson's P. S.	1	1	0
Applegrove P. S.	School + 1 hut with 2 classrooms	1	0
Bishopmill P. S.	School + 1 hut with 3 classrooms, 1 hut - partnership playgroup	1	0
Botriphnie P. S.	1	1	0
Burghead P. S.	1	1	0
Cabrach P. S.	School + double garage (storage only)	1	0
Cluny P. S.	1 + kitchen dining block	1	0
Craigellachie P. S.	School + 1 hut with 2 classrooms + [community hall (servey/dining /GP)]	1	0
Crossroads P. S.	1 + kitchen dining block	1	0
Cullen P. S.	School + 1 hut with nursery	1	0
Dallas P. S.	1	1	0
Dyke P. S.	1 + kitchen dining block	1	0
East End P. S.	2 blocks	1	0
Findochty P. S.	1	1	0
Glenlivet P. S.	1	1	0
Greenwards P. S.	1	1	0
Hopeman P. S.	1 + Annexe	1	0
Hythehill P. S.	1	1	0
Inveravon P. S.	1	1	0
Knockando P. S.	1 + 2 huts (1 with PE and 1 with kitchen, dining and 1 classroom)	1	0
Lhanbryde P. S.	1	1	0
Logie P. S.	School + 1 hut with dining and servery areas + Hall	1	0
Millbank P. S.	1 + Nursery block	1	0
Milne's P. S.	School + Kitchen / Dining + 1 hut (1 classroom, nursery, playgroup, office)	1	0
Mortlach P. S.	School + 1 hut with nursery + store	1	0
Mosstodloch P. S.	1	1	0
Mosstowie P. S.	1	1	0
New Elgin P. S.	School + 1 hut with LCN base, and playgroup areas	1	0
Newmill P. S.	1	1	0
Pilmuir P. S.	School + 1 hut with 2 classrooms + 1 hut for Nursery	1	0
Portessie P. S.	1	1	0
Portgordon P. S.	School + 1 block (Community Centre) used for Hall & GP space	1	0
Portknockie P. S.	1 + block used for partnership playgroup	1	0
Roths P. S.	1 + 2 blocks used for storage	1	0
Rothiemay P. S.	School + 1 hut comprising kitchen / dining areas	1	0
Seafieid P. S.	School + Nursery + 1 hut with 2 classrooms	1	0
St Gerardine P. S.	1	1	0
St Peter's P. S.	1	1	0
St Sylvester's P. S.	1	1	0
St Thomas P. S.	1	1	0
Tomintoul P. S.	1 (Public Library also located in school)	1	1
West End P. S.	School + 1 hut store + 1 hut kitchen / dining / GP space	1	0
Buckie H. S.	School + 3 huted blocks	1	0
Forres Ac.	School + 4 huted blocks + LCN base	1	0
Keith G. S.	School + Music Base + Shared dining and kitchen/classroom block	1	1
Lossiemouth H. S.	School + SFL Hut	1	0
Milne's H. S.	1 + garage	1	0
Speyside H. S.	School + Old Library (now store)	1	0
Beechbrae	1 - part of larger Educational Resources Centre	1	1
Pinefield Parc	1	1	0

12.3 Value

Schools	Gross Replacement Value £000s	Accumulated Depreciation £000s - (GRV-DRC) Value	Net Book Value - £000s (DRC)	Useful life for depreciation (remaining life)	School age - Original construction completion date and main additions	Ownership status
ABERLOUR PS	2316.1	782.0	1534.1	60	1897 (Cat B - listed)	owner occupied
ALVES PS	1227.2	633.3	593.9	30	1874 (Cat B - listed)	owner occupied
ANDERSON PS	3094.5	1443.5	1651.0	40	Main building 1880 (Cat B - listed)	owner occupied
APPLEGROVE PS	5877.2	3066.5	2810.7	30	Senior School 1959 - Junior School 1954	owner occupied
BISHOPMILL PS	3968.2	1391.6	2576.6	40	1893/1936	owner occupied
BOTRIPHNE PS	435.7	156.6	279.1	60	1875 (Cat B - listed)	owner occupied
BURGHEAD PS	1882.7	1118.1	764.6	40	1874	owner occupied
CABRACH PS	509.8	271.3	238.5	60	1980	owner occupied
CLUNY PS	3539.0	1285.8	2253.2	50	started pre 1936 - full school by 1947	owner occupied
CRAIGELLACHIE PS	747.2	283.2	464.0	50	1900 - 1901 (Cat B - listed)	owner occupied
CROSSROADS PS	513.5	327.5	186.0	20	1876	owner occupied
CULLEN PS	2425.5	841.4	1584.1	40	1965	owner occupied
DALLAS PS	529.3	290.9	238.4	40	old building 1876 - new extension 1994	owner occupied
DYKE PS	1399.2	769.5	629.7	30	1876	owner occupied
EAST END PS	4956.4	3165.4	1791.0	20	old building 1831 - new building 1973 (Cat B - listed)	owner occupied - (R of R)
FINDOCHTY PS	2559.0	978.0	1581.0	40	1980	owner occupied
GLENLIVET PS	758.8	417.1	341.7	30	old building 1887 - new building 1983/4	owner occupied
GREENWARDS PS	4090.7	2037.0	2053.7	20	1977	owner occupied
HOPEMAN PS	2309.1	1035.9	1273.2	40	Oldest building - 1874 / newest build 1952	owner occupied
HYPHEHILL PS	4753.0	2115.6	2637.4	30	1963	owner occupied
INVERAVON PS	810.1	461.3	348.8	40	1890 - extension in 1970's	owner occupied
KNOCKANDO PS	1303.2	837.1	466.1	20	pre 1870's	owner occupied
LHANBRYDE PS	4071.4	583.5	3487.9	60	1996	owner occupied
LOGIE PS	1104.4	656.5	447.9	15	estimate - mid to late 1800's	owner occupied

MILLBANK PS	3724.9	987.2	2737.7	40	1975	owner occupied
MILNE'S PS	3599.9	1335.5	2264.4	50	1851/1996 (Cat A - listed)	owner occupied
MORTLACH PS	3400.1	1537.7	1862.4	40	1861	owner occupied
MOSSTODLOCH PS	2673.3	1320.6	1352.7	20	1969	owner occupied
MOSSTOWIE PS	845.5	442.4	403.1	40	1880 - extension in 1970's	owner occupied
NEW ELGIN PS	5222.9	2833.7	2389.2	30	1905	owner occupied
NEWMILL PS	949.4	321.3	628.1	80	1988	owner occupied
PILMUIR PS	2988.4	1455.0	1533.4	20	1880	owner occupied
PORTESSIE PS	2061.9	771.0	1290.9	40	estimate - 1860's	owner occupied
PORTGORDON PS	1400.3	652.1	748.2	30	1879	owner occupied
PORTKNOCKIE PS	1546.4	880.4	666.0	30	1875	owner occupied
ROTHES PS	2240.8	946.8	1294.0	60	1875	owner occupied
ROTHIEMAY PS	1045.0	629.5	415.5	30	1886	owner occupied
SEAFIELD PS	5255.3	2437.1	2818.2	30	1955	owner occupied
ST. GERARDINE'S PS	4712.5	2512.5	2200.0	30	1974	owner occupied
ST. PETERS PS	1680.0	947.1	732.9	40	1864 - new ext 1938	owner occupied
ST. Sylvester's PS	1601.5	419.1	1182.4	60	1995 (Cat B - listed)	leased in occupied
ST. THOMAS PS	1346.2	424.3	921.9	40	1970	owner occupied
TOMINTOUL PS	2094.1	641.0	1453.1	60	1989 - 1990	owner occupied
WEST END PS	2607.3	962.6	1644.7	40	1875	owner occupied
BUCKIE HIGH	18092.2	7776.3	10315.9	50	Pre war - 1973 - phases added	owner occupied
FORRES ACADEMY	16428.1	6943.0	9485.1	40	1967	owner occupied
KEITH GRAMMAR	9808.7	3967.8	5840.9	40	1961	owner occupied
LOSSIEMOUTH HIGH	14680.7	5673.3	9007.4	40	1975/1977 new extension 2000	owner occupied
MILNE'S HIGH	10455.6	2531.9	7923.7	60	1980	owner occupied
SPEYSIDE HIGH	11068.1	2967.5	8100.6	60	1975	owner occupied
BEECHBRAE	1895.7	1101.0	794.7		1999 - major refurbishment	owner occupied
PINEFIELD PARC	915.9	307.8	608.1		1999	owner occupied

Note – (R of R) refers to Right of Reversion.

12.4 Condition

School	Category	School	Category
ABERLOUR P. S.	A	BUCKIE HIGH SCHOOL	D
ALVES P. S.	D	FORRES ACADEMY	B
ANDERSON P. S.	C	KEITH GRAMMAR SCHOOL	C
APPLEGROVE P. S.	B	LOSSIEMOUTH HIGH SCHOOL	B
BISHOPMILL P. S.	B	MILNE'S HIGH SCHOOL	D
BOTRIPHNIE P. S.	B	SPEYSIDE HIGH SCHOOL	B
BURGHEAD P. S.	B	BEECHBRAE	* Not surveyed
CABRACH P. S.	B	PINEFIELD PARC	* Not surveyed
CLUNY P. S.	B		
CRAIGELLACHIE P. S.	B		
CROSSROADS P. S.	B		
CULLEN P. S.	B		
DALLAS P. S.	B		
DYKE P. S.	B		
EAST END P. S.	C		
FINDOCHTY P. S.	B		
GLENLIVET P. S.	B		
GREENWARDS P. S.	B		
HOPEMAN P. S.	B		
HYTHEHILL P. S.	C		
INVERAVON P. S.	B		
KNOCKANDO P. S.	B		
LHANBRYDE P. S.	A		
LOGIE P. S.	C		
MILLBANK P. S.	B		
MILNE'S P. S.	A		
MORTLACH P. S.	B		
MOSSTODLOCH P. S.	C		
MOSSTOWIE P. S.	B		
NEW ELGIN P. S.	C		
NEWMILL P. S.	B		
PILMUIR P. S.	A		
PORTESSIE P. S.	C		
PORTGORDON P. S.	B		
PORTKNOCKIE P. S.	B		
ROTHES P. S.	B		
ROTHIEMAY P. S.	C		
SEAFIELD P. S.	B		
ST. GERARDINE'S P. S.	B		
ST. PETERS P. S.	D		
ST. SYLVESTER'S P. S.	A		
ST. THOMAS P. S.	B		
TOMINTOUL P. S.	D		
WEST END P. S.	B		

* **Note:** No survey has been carried out but - Pinefield Parc was opened in 1999 and good condition is assumed. Similarly, Beechbrae was completely refurbished in 1999 good condition is assumed.

12.5 Sufficiency

	Pupil Roll 04/05	School (Working) Capacity 04/05	04/05 Occupancy %	Projected Pupil Roll 11/12	11 / 12 Occupancy %
ABERLOUR P. S.	151	199	76%	106	53%
ALVES P. S.	69	100	69%	51	51%
ANDERSON P. S.	242	294	82%	152	52%
APPLEGROVE P. S.	395	534	74%	321	60%
BISHOPMILL P. S.	366	394	93%	324	82%
BOTRIPHNE P. S.	38	42	90%	27	64%
BURGHEAD P. S.	122	180	68%	133	74%
CABRACH P. S.	5	25	20%	6	24%
CLUNY P. S.	351	380	92%	235	62%
CRAIGELLACHIE P. S.	53	75	71%	42	56%
CROSSROADS P. S.	40	50	80%	20	40%
CULLEN P. S.	150	247	61%	99	40%
DALLAS P. S.	40	50	80%	33	66%
DYKE P. S.	85	100	85%	40	40%
EAST END P. S.	209	404	52%	200	50%
FINDOCHTY P. S.	120	155	77%	98	63%
GLENLIVET P. S.	33	66	50%	25	38%
GREENWARDS P. S.	322	431	75%	309	72%
HOPEMAN P. S.	242	265	91%	171	65%
HYPHILL P. S.	357	439	81%	350	80%
INVERAVON P. S.	31	50	62%	19	38%
KNOCKANDO P. S.	49	75	65%	41	55%
LHANBRYDE P. S.	247	312	79%	215	69%
LOGIE P. S.	49	75	65%	20	27%
MILLBANK P. S.	259	326	79%	227	70%
MILNE'S P. S.	217	265	82%	165	62%
MORTLACH P. S.	164	222	74%	154	69%
MOSSTODLOCH P. S.	233	279	84%	133	48%
MOSSTOWIE P. S.	68	75	91%	54	72%
NEW ELGIN P. S.	295	451	65%	350	78%
NEWMILL P. S.	47	100	47%	69	69%
PILMUIR P. S.	183	297	62%	204	69%
PORTESSIE P. S.	114	150	76%	128	85%
PORTGORDON P. S.	85	125	68%	69	55%
PORTKNOCKIE P. S.	85	150	57%	94	63%
ROTHES P. S.	121	153	79%	95	62%
ROTHIEMAY P. S.	64	75	85%	32	43%
SEAFIELD P. S.	374	428	87%	307	72%
ST. GERARDINE'S P. S.	274	450	61%	232	52%
ST. PETERS P. S.	29	125	23%	13	10%
ST. SYLVESTER'S P. S.	208	228	91%	190	83%
ST. THOMAS P. S.	62	74	84%	67	91%
TOMINTOUL P. S.	52	75	69%	45	60%
WEST END P. S.	244	252	97%	220	87%
BUCKIE HIGH SCHOOL	992	990	100%	794	80%
FORRES ACADEMY	1086	1100	99%	1010	92%
KEITH GRAMMAR SCHOOL	496	600	83%	487	81%

LOSSIEMOUTH HIGH SCHOOL	737	760	97%	646	85%
MILNE'S HIGH SCHOOL	571	680	84%	492	72%
SPEYSIDE HIGH SCHOOL	505	600	84%	458	76%
BEECHBRAE	8 - indicative		There is likely to be sufficient places as school rolls are reducing.		
PINEFIELD	15 - indicative				

12.6 Suitability

School	Category	School	Category
ABERLOUR P. S.	B	PILMUIR P. S.	B
ALVES P. S.	B	PORTESSIE P. S.	B
ANDERSON P. S.	B	PORTGORDON P. S.	C
APPLEGROVE P. S.	B	PORTKNOCKIE P. S.	B
BISHOPMILL P. S.	C	ROTHES P. S.	B
BOTRIPHNE P. S.	C	ROTHIEMAY P. S.	C
BURGHEAD P. S.	C	SEAFIELD P.S.	B
CABRACH P. S.	B	ST. GERARDINE'S P. S.	B
CLUNY P. S.	C	ST. PETERS P. S.	B
CRAIGELLACHIE P. S.	B	ST. SYLVESTER'S P. S.	B
CROSSROADS P. S.	B	ST. THOMAS P. S.	B
CULLEN P. S.	B	TOMINTOUL P. S.	B
DALLAS P. S.	B	WEST END P. S.	B
DYKE P. S.	B	BUCKIE HIGH SCHOOL	C
EAST END P. S.	B	FORRES ACADEMY	B
FINDOCHTY P. S.	B	KEITH GRAMMAR SCHOOL	C
GLENLIVET P. S.	B	LOSSIEMOUTH HIGH SCHOOL	B
GREENWARDS P. S.	B	MILNE'S HIGH SCHOOL	C
HOPEMAN P. S.	B	SPEYSIDE HIGH SCHOOL	C
HYPHEHILL P. S.	B	BEECHBRAE	B
INVERAVON P. S.	B	PINEFIELD PARC	A
KNOCKANDO P. S.	B		
LHANBRYDE P. S.	B		
LOGIE P. S.	B		
MILLBANK P. S.	B		
MILNE'S P. S.	B		
MORTLACH P. S.	B		
MOSSTODLOCH P. S.	B		
MOSSTOWIE P. S.	B		
NEW ELGIN P. S.	C		
NEWMILL P. S.	B		

12.7 Financial Performance

School (figures as at 2002/03)	Gas	Electricity	Oil	Water	Total	GIA Gross Internal Area	£ per sq. m
ABERLOUR PS		£4,395	£4,761	£3,762	£12,918	1611	£8.02
ALVES PS		£2,890	£3,530	£2,389	£8,809	693	£12.71
ANDERSON PS	£3,879	£3,012		£5,495	£12,386	2038	£6.08
APPLEGROVE PS	£4,767	£7,398		£4,563	£16,728	3301	£5.07
BISHOPMILL PS	£6,690	£3,711		£6,243	£16,644	2134	£7.80
BOTRIPHNE PS		£1,669	£991	£410	£3,070	228	£13.46
BURGHEAD PS		£2,335	£3,925	£2,257	£8,517	1298	£6.56
CABRACH PS		£1,640			£1,640	261	£6.28
CLUNY PS		£2,222	£4,839	See below	£14,061	2333	£6.03
CRAIGELLACHIE PS		£2,950		£1,315.00	£4,265	416	£10.25
CROSSROADS PS		£2,997		£1,124	£4,121	343	£12.01
CULLEN PS		£4,012	£4,000	£3,612	£11,624	1259	£9.23
DALLAS PS		£3,473		£1,192	£4,665	283	£16.48
DYKE PS		£4,193	£897	£1,481	£6,571	768	£8.56
EAST END PS	£5,222	£5,722		£4,501	£15,445	2874	£5.37
FINDOCHTY PS		£4,559	£3,292	£2,918	£10,769	1556	£6.92
GLENLIVET PS		£5,005		£500	£5,505	371	£14.84
GREENWARDS PS	£4,636	£8,346		£3,896	£16,878	2138	£7.89
HOPEMAN PS		£5,844	£6,021	£3,786	£15,651	1598	£9.79
HYPHEHILL PS	£7,400	£10,002		£6,662	£24,064	2711	£8.88
INVERAVON PS		£1,722	£1,894	£707	£4,323	406	£10.65
KNOCKANDO PS		£3,851	£1,284	£441	£5,576	663	£8.41
LHANBRYDE PS	£6,755	£6,683		£6,481	£19,919	2433	£8.19
LOGIE PS		£4,890			£4,890	517	£9.46
MILLBANK PS		£19,242		£4,321	£23,563	2225	£10.59
MILNE'S PS	£4,467	£13,412		£7,457	£25,336	2252	£11.25
MORTLACH PS		£2,544	£4,685	£5,452	£12,681	1797	£7.06
MOSSTODLOCH PS	£3,259	£119		£3,664	£7,042	1513	£4.65
MOSSTOWIE PS		£1,851	£1,838	£546	£4,235	533	£7.95
NEW ELGIN PS	£7,730	£9,633		£9,498	£26,861	2971	£9.04
NEWMILL PS		£1,154	£2,077	£865	£4,096	625	£6.55
PILMUIR PS		£12,737		£12,747	£25,484	1558	£16.36
PORTESSIE PS		£3,355	£3,164	£2,262	£8,781	1241	£7.08
PORTGORDON PS		£2,948	£2,974	£2,220	£8,142	932	£8.74
PORTKNOCKIE PS	£73	£3,048	£2,542	£2,713	£8,376	1069	£7.84
ROTHES PS	£2,686	£2,184		£4,980	£9,850	1619	£6.08
ROTHIEMAY PS		£2,441	£993	£1,609	£5,043	669	£7.54
SEAFIELD PS	£60	£7,910	£6,536	£5,572	£20,078	3060	£6.56
ST. GERARDINE'S PS	£4,770	£6,614		£5,138	£16,522	2790	£5.92
ST. PETERS PS	£2,539	£1,685		£2,937	£7,161	1126	£6.36
ST. SYLVESTER'S PS	£2,018	£3,978		£2,555	£8,551	1136	£7.53
ST. THOMAS PS	£3,068	£1,752		£1,495	£6,315	851	£7.42
TOMINTOUL PS		£684	£5,870	£2,493	£9,047	1056	£8.57
WEST END PS	£2,548	£4,047		£4,411	£11,006	1408	£7.82
BUCKIE HIGH SCHOOL	£117	£37,844	£31,133	£17,710	£86,804	9111	£9.53
FORRES ACADEMY	£9,989	£27,279		£36,675.	£73,943	11419	£6.48
KEITH GRAMMAR	£11,139	£34,597		£12,671	£58,407	6923	£8.44

LOSSIEMOUTH HIGH	£16,968	£29,953		£10,671	£57,592	8828	£6.52
MILNE'S HIGH	£11,435	£21,678		£15,488	£48,601	7427	£6.54
SPEYSIDE HIGH		£20,488	£26,856	£18,348	£65,692	7656	£8.58
BEECHBRAE	The Special school is part of the larger complex. Costs are not split out						
PINEFIELD PARC	Costs to be obtained						

Note: The water charges for Cluny Primary School have, until 2004/2005, been incorporated into Buckie High School water charges. This means that some adjustment to figures will be required to reflect the true position. It is likely that there will be some impact on the score for each school and consequently the overall priority list may be slightly affected.

13 APPENDIX 2

13.1 Resource Needs and Funding Requirements

4 Year Projection – 2004/2005 to 2007/2008						
EXPENDITURE REQUIREMENTS	2004/05 £ (000's)	2005/06 £ (000's)	2006/07 £ (000's)	2007/08 £ (000's)	TOTAL £ (000's)	Notes
Capital (For replacements and developments)	9,500	9,500	9,500	9,500	38,000	1
ICT – PPP for all schools	1,844	1,844	326	0	4,014	2
Revenue – Reactive Maintenance	563	1,500	1,500	1,500	5,063	
- Planned Maintenance	563	1,500	1,500	1,500	5,063	
DDA	0	320	320	320	960	
Asbestos Removal	30	30	30	30	120	3
Legionella	100	100	100	100	400	4
Total	12,600	14,794	13,276	12,950	53,620	
FUNDING REQUIREMENTS						
School Improvement Fund	1,317	1,660	1,740	1,821	6,538	5
Existing Capital Plan Allocation (borrowing)	2,234	2,865	2,195		7,294	
Existing Revenue Budget Allocation	800	800	800	800	3,200	
PPP - Level Playing Field Support	200	200	200	0	600	6
Total	4,551	5,525	4,935	2,621	17,632	
Funding Gap	8,049	9,269	8,341	10,329	35,988	

Notes

1. Funding requirement identified in 2000 to deliver a modern school estate was £95m. The assumption was made that this cost would be spread over 10 years. Considerable caution is required when assessing this figure because it was arrived at from a desktop based survey rather than on-site surveys.
2. Payments to ICL due to close in 2006/2007 at completion of seven year PFI Information Communication Technology contract.
3. Five-year rolling programme commenced in 2002/2004.
4. Estimated sum at this stage based on best assessment from Property Services.
5. This figure includes the additional sum announced by the Scottish Executive on 16th November 2004 for school building work in relation to cutting class sizes. The funding covers the period from 2005/06 to 2007/08.
6. Capital budget contribution to the ICT contract with ICL (see also 2 above).

13.2 Longer Term Financial Planning

The Council agreed a Three-year Financial Plan for 2004 to 2007 in February, 2004 and is committed to reviewing and updating the Plan for 2005 to 2008 in February, 2005.

An assessment of the impact of Asset Management was introduced to the Financial Planning process last year (2003/2004). This involved Departments identifying investment needs for replacing and maintaining assets for the ten years ahead. The information upon which these assessments were based varied widely and the requirement for reliable and consistent information was recognised at that time. Nevertheless, the Council also acknowledged the need for additional investment in asset maintenance and replacement with significant additional allocations being included in both the Capital Plan and Revenue Budget.

Limited progress has been made on Corporate Asset Management Planning and a Report was provided to the Council on 7th July, 2004, providing a position statement and identifying a number of tasks to be undertaken in this area.

Development of the Corporate Asset Management framework will be a key aspect to enable the Council to extend the Financial Planning arrangements from three years to ten years. The Chief Financial Officer, during the preparation of the 2005 to 2008 Financial Plan, will develop this theme further.

On the assumption that the Scottish Executive continues to issue Three Year Financial Settlements on a biennial basis, it is envisaged that longer term Financial Planning will be developed over the following timeframe:

2004	Three Year Plan for 2005 to 200
2005	Update Three Year Plan for 2005 to 2008 Prepare initial draft Ten Year Plan and highlight major data collection/assessment issues including Asset Management.
2006	Spending Review by Scottish Executive - Three Year Plan for 2007 to 2010. Update Ten Year Plan - review data reliability.
2007	Finalise Ten-year Financial Plan.

14 APPENDIX 3

14.1 Full Prioritised List of Schools

School	Overall score	Suitability	Condition	Sufficiency by 2011	Maintenance 1 - 5 yrs.	Remote accomm.	Energy Cost per sq. m
St. Peters	131	B	D	10%	£93,860	0	£6.36
Buckie H S	130	C	D	80%	£465,765	3	£9.53
Logie	129	B	C	27%	£95,515	2	£9.46
Rothiemay	128	C	C	43%	£10,250	1	£7.54
Forres Ac	123	B	B	92%	£507,250	5	£6.48
Keith G S	114	C	C	81%	£392,095	2	£8.44
New Elgin	113	C	C	78%	£367,645	1	£9.04
Milnes H S	113	C	D	72%	£434,155	0	£6.54
Portgordon	111	C	B	55%	£55,775	1	£8.74
Cluny	110	C	B	62%	£77,345	1	£6.03
East End	110	B	C	50%	£172,150	1	£5.37
Tomintoul	107	B	D	60%	£50,050	0	£8.57
Mosstodloch	107	B	C	48%	£240,990	0	£4.65
Alves	104	B	D	51%	£63,325	1	£12.71
Cullen	102	B	B	40%	£74,200	1	£9.23
Anderson	102	B	C	52%	£148,850	0	£6.08
Crossroads	102	B	B	40%	£16,985	1	£12.01
Glenlivet	101	B	B	38%	£24,400	0	£14.84
Botriphnie	100	C	B	64%	£23,915	0	£13.46
Dyke	100	B	B	40%	£40,615	1	£8.56
Cabrach	99	B	B	24%	£15,700	0	£6.58
Inveravon	99	B	B	38%	£28,150	0	£10.65
Craigellachie	98	B	B	56%	£17,100	2	£10.25
Knockando	97	B	B	55%	£24,310	2	£8.41
Hopeman	91	B	B	65%	£43,515	1	£9.79
Mortlach	91	B	B	69%	£139,200	1	£7.06
Speyside H S	90	C	B	76%	£472,060	0	£8.58
Bishopmill	90	C	B	82%	£76,950	1	£7.80
St. Gerardines	89	B	B	52%	£278,225	0	£5.92
Applegrove	88	B	B	60%	£64,250	1	£5.07
Hythehill	87	B	C	80%	£286,070	0	£8.88
Dallas	87	B	B	66%	£35,175	0	£16.48
Portessie	84	B	C	85%	£173,380	0	£7.08
Roths	82	B	B	62%	£140,475	0	£6.08
Newmill	81	B	B	69%	£55,100	0	£6.55
Burghead	80	C	B	74%	£27,600	0	£6.56
Portknockie	80	B	B	63%	£14,710	0	£7.84
Findochty	80	B	B	63%	£31,650	0	£6.92
Millbank	78	B	B	70%	£76,740	1	£10.59
Seafield	77	B	B	72%	£136,975	2	£6.56
Lossiemouth H S	77	B	B	85%	£234,725	1	£6.52
Pilmuir	77	B	A	69%	£33,420	2	£16.36
West End	75	B	B	87%	£61,020	2	£7.82
Milnes Primary	74	B	A	62%	£42,545	2	£11.25
St. Thomas	71	B	B	91%	£44,850	0	£7.42
Greenwards	70	B	B	72%	£220,700	0	£7.89
Aberlour	68	B	A	53%	£58,550	0	£8.02
Mosstowie	67	B	B	72%	£73,275	0	£7.95
Lhanbryde	64	B	A	69%	£49,910	0	£8.19
St. Sylvesters	46	B	A	83%	£39,500	0	£7.53
Beechbrae	27	B	Not surveyed	N/a	Not surveyed	0	Not surveyed
Pinefield Parc	7	A	Not surveyed	N/a	Not surveyed	0	Not surveyed

Note: Remote accommodation – number of buildings in addition to the main school

15 APPENDIX 4

15.1 Primary School Accommodation Table (Current formula)

No of Classrooms / Areas Available as Class "Bases"	Desirable Additional Accommodation AVA/TV/GP Quiet Rooms, etc (including Library/Hall for PE)	Staff Admin Facilities
1	1	1
2	1	2
3	1	2
4	2	2
5	2	3
6	2	3
7	3	3
8	3	4
9	3	4
10	4	4
11	4	4
12	4	4
13	4	4
14	5	5
15	5	5
16	5	5
17	5	5
18	5	5
19	6	5
20	6	5
21	6	5/6
22	7	5/6
23	7	5/6
24	7	5/6
25	7	5/6
26	8	5/6
27	8	5/6
28	8	5/6

16 APPENDIX 5

16.1 Web Survey Results

NOTE

Web survey results are contained in the following 6 pages.

Where detailed comments have been made for a particular school (question 7 and question 8 - Final Comments in the web survey results), these are held on file and will be included for consideration in the Options Appraisal process where appropriate.

17 APPENDIX 6

17.1 System used to give Ranking Scores to Schools

Condition		
Suitability rating	Category	Ranking score
A	Good – performing well and operating efficiently	1
B	Satisfactory – performing adequately but showing minor deterioration	5
C	Poor – showing major defects and or not operating adequately	8
D	Bad – life expired and / or serious risk of imminent failure	10

Sufficiency	
Capacity (%)	Ranking score
1 – 19 %	10
20 – 29%	9
30 – 39%	8
40 – 49%	7
50 – 59%	6
60 – 69%	5
70 – 79%	4
80 – 89%	3
Primary Schools only - 90 – 100%	2
Secondary Schools only 90 – 100%	8

Suitability		
Suitability rating	Category	Ranking score
A	Good – performing well and operating efficiently	1
B	Satisfactory – performing well but with minor problems	5
C	Poor – showing major problems and or not operating optimally	8
D	Bad – does not support the delivery of services to children and communities	10

Extent of School Estate – Number of buildings	
Number of buildings on site	Ranking score
1	1
2	3
3	5
4	7
5	9
6	10

Priority repairs and maintenance costs	
Cost (£000's) over 3 year period	Ranking score
Up to 20	1
21 – 50	2
51 – 100	3
101 – 150	4
151 – 200	5
201 – 250	6
251 – 300	7
301 – 350	8
351 – 400	9
Over 401	10

Energy costs	
Costs per square metre	Ranking score
Under £5	1
£5 - £5.99	2
£6 - £6.99	3
£7 - £7.99	4
£8 - £8.99	5
£9 - £9.99	6
£10 - £11.99	7
£12 – 13.99	8
£14 - £14.99	9
£15 and over	10