

North Lanarkshire Council Report

Policy and Strategy Committee

Does this report require to be approved? Yes No

Ref JMcK/CMcC

Date 07/12/23

Strategic Asset Review and Investment Strategy (SARIS): School Estate – Report One

From James McKinstry, Chief Officer (Asset and Procurement)

E-mail McKinstryJ@northlan.gov.uk **Telephone** Via Teams

Executive Summary

North Lanarkshire Council has a successful track record of both investing in our school estate, and ensuring our learning and teaching establishments continue to respond to the iterative nature of learning and teaching techniques and practices. In this regard, the Town and Community Hub programme is the latest iteration of previously successful programmes.

The uniqueness of the Hub programme is to look to create greater integration of the wider community within these assets, including our increasing older adult population. The Strategic Asset Review and Investment Strategy (SARIS) will focus on three key areas, as outlined in the main report below:

- a) Invest in the learning estate through the creation of new town and community hubs.
- b) Invest in the learning estate through the adaptation of existing facilities to make them more accessible and usable to the wider communities.
- c) Invest and rationalise the learning and wider estate to make it more efficient and thus sustainable (from a capacity perspective).

The council's Financial Planning Advisory Group (FPAG) requested a review of the school estate at their first meeting. This report responds directly to the action from the first FPAG where it was identified that *a paper should be prepared and presented at a future meeting, setting out the options for a review of the school estate.*

As outlined above, and in the main report below, this report outlines the intended action. The next stage of this review is to carry out diagnostic analysis of the existing estate, in line with the agreed prioritisation matrix principles and thereafter present the results.

This will inform investment decisions for both the Town and Community Hub programme, and the general capital programme.

Recommendations

It is recommended that the Policy and Strategy Committee:

- 1) Acknowledge the approach being taken to progress both investment and rationalisation proposals, in line with the upcoming renewed capital programme

allocation – noting the previously agreed commitment to replace all ‘pre-1996’ establishments.

The Plan for North Lanarkshire

Priority	All priorities
Ambition statement	All ambition statements
Programme of Work	Transforming Places One Service

1. Background

- 1.1 This report is one of a series of reports linked to the Strategic Asset Review and Investment Strategy – SARIS. This is referred to as SARIS within the remainder of this report. SARIS covers various areas, each of which is linked to a specific asset portfolio. The asset portfolio covered in this report is the learning and teaching estate.
- 1.2 The school estate is the largest of the (non-HRA) council asset portfolios. The school estate are strategic assets located within the heart of all our local communities – each of which plays a significant role, and in most cases provides a clear visual impact, within the local communities we serve. This learning and teaching estate currently includes 23 secondary schools; 120 primary schools; along with early years and additional support needs establishments.
- 1.3 Any business or organisation which has such a significant asset portfolio, distributed geographically across their area of business, would consider this a key enabler for service delivery and distribution. Through The Plan for North Lanarkshire, the council acknowledges this and looked to position these assets as “more than schools” through the ambition linked to the Town and Community Hub programme.
- 1.4 The Town and Community Hub Programme follows on from other ‘school centred’ programmes such as “Education 2010”, “Schools and Centres 21” and the three phases contained within it.
- 1.5 In 2012, a series of reports was presented to committee on the work to date and the continuing transition towards a sustainable school estate. There were three key areas of focus for the Schools and Centres 21 programme at that time:
- Improve the occupancy/capacity ratios.
 - Increase condition and suitability of schools.
 - Reduce the carbon footprint.
- 1.6 The three outcomes linked to the 2012 reports remain relevant in 2023 – however, the focus has transferred from delivering facilities for the school community, to delivering facilities for the whole community.
- 1.7 In 2012, the reports were segmented into the six local area partnership (geographical) areas at that time. In this series of reports, the estate and associated data will be segmented into three geographic areas, each incorporating three community board areas:
- 1.7.1 North Area: incorporating the community board areas of Northern Corridor; Cumbernauld; and Kilsyth.

- 1.7.2 Central Area: incorporating the community board areas of Airdrie; Bellshill; and Coatbridge.
- 1.7.3 South Area: incorporating the community board areas of Motherwell; Wishaw; and Shotts.
- 1.8 The segmentation of estate data into the three areas outlined above ensures alignment with the other strands linked to the SARIS review (such as linking to the future operating model) which are also segmented into the three areas outlined in section 1.7 above.
- 1.9 The proposed reports, directly respond to the discussion and associated action at the first Financial Planning Advisory Group (FPAG), where it was requested that *a paper should be prepared and presented at a future meeting, setting out the options for a review of the school estate.*

2. Report

- 2.1 Whilst the three strategic outcomes highlighted in the 2012 reports, linked to the school estate remain valid, the council has adopted updated strategies which now focus on the whole community rather than just the school community. The Plan for North Lanarkshire sets the tone and the context for the current aspirations, for our communities, and the assets within the heart of these local communities.
- 2.2 In March 2020, as part of “the place, the vision” update provided to the Policy and Strategy Committee, the council agreed to adopt a prioritisation matrix linked to the replacement of the school estate (attached at Appendix A, transitioning to a new ‘Town and Community Hub’ model of service delivery – thus making the transition from ‘school asset’ to ‘community asset’. An estate which still serves the school community but also maximises the opportunities and benefits of having such significant assets within the heart of our communities – and facilitating delivery of services which serve the whole community from these assets/facilities.

March 2020 – A global shift

- 2.3 Within a week, following the presentation to the Policy and Strategy Committee in March 2020, a nationwide lockdown was introduced in response to the Covid-19 pandemic. This presented dramatic changes in both the short and medium term. Therefore, within the last three years - the council, our partners, and the associated markets have been adjusting to the new pressures which affect our ability to transition to the new model at the pace anticipated in March 2020. In short, seismic increases in costs for construction related activities; costs and availability of materials, along with significant increases to inflation, requires a recalibration of what can be delivered in the short to medium term.
- 2.4 Whilst the conditions (within which the Town and Community Hub programme must operate) have changed, the ambitions and opportunities have not. Within the March 2020 report there was an acceptance that all schools could not be replaced in the short term and that a portion of the funding would be required to transition existing establishments to hub type models, ahead of new build facilities being realised.
- 2.5 That said, the council continues to plan for, and deliver, a number of strategic projects for our young people and their associated local communities, against a challenging backdrop of increased costs and budgetary pressures.

Current Delivery Programme

- 2.6 The signs of the transition to the Town and Community Hub programme are evident through the hubs currently in design, and those recently opened. These include:
- 2.6.1 North Area: the new Chryston Community Hub and Health Centre (open October 2023) – the first of a kind within North Lanarkshire, bringing together the school estate and the NHS Lanarkshire estate which serves this local community, creating efficiencies and opportunities for joint working.
 - 2.6.2 Central Area: the new Riverbank Community Hub in Coatbridge (open August 2023) – bringing together two smaller primary schools and early years pupils into a new hub which has outstanding civic presence within the Sikeside/Carnbroe area of Coatbridge.
 - 2.6.3 South Area: the new Newmains and St Brigid's Community Hub in Wishaw (open February 2023) – bringing together two primary schools onto a joint campus, along with associated early years provision. Since opening, this facility has already won numerous awards for architectural design.
- 2.7 Further projects are being delivered within the current programme include:
- Orbiston Community Hub, Bellshill, South Area
 - St Kevin's Community Hub, Bargeddie, Central Area
 - St Stephen's Community Hub, Coatbridge, Central Area
 - Gartcosh Community Hub, Northern Corridor, North Area
 - Chryston High Extension, Northern Corridor, North Area
- 2.8 Significant progress has therefore been made and maintained in the most challenging of external positions – ensuring continued delivery of tens of millions of pounds being spent in local areas, to deliver exceptional community assets within the heart of our local communities.

Strategy and Vision – Invest (New Build)

- 2.9 The strategy and vision outlined within The Plan for North Lanarkshire, was further articulated through 'The Place, The Vision' in March 2020, and follow up report to Policy and Strategy Committee in September 2021.
- 2.10 Within the September 2021 report, members were advised of the outcome of the 'first pass' of the prioritisation matrix on the existing school estate, highlighting those establishments which are deemed to be the highest priority from a deprivation perspective – a key area of focus from The Plan for North Lanarkshire.
- 2.11 Assessment has been ongoing in relation to the other five weighed inputs, contained within the agreed prioritisation matrix, with a view to bidding for capital funding from the upcoming refreshed capital programme. As was previously the case, projects will be prioritised based on three criteria:
- 2.11.1 Legacy Projects: These are projects that were already approved for delivery before the change from Schools and Centres 21 programme, to the hub programme.

- 2.11.2 Capacity Projects: These are projects which are required to significantly increase the capacity of schools, primarily as a result of housing growth within the associated catchment areas.
- 2.11.3 Policy Projects: These are projects which are being brought forward in line with the aspirations of The Plan for North Lanarkshire, and the council ambition to replace all pre-1996 education establishments – in line with the agreed prioritisation matrix (attached at Appendix A).
- 2.12 This approach fits both with the principles outlined in the Town and Community Hub programme strategy, as well as the principles adopted in 2012: improve occupancy (capacity); improve condition (building); improve carbon footprint (energy efficiency).

Strategy and Vision - Invest (Existing estate)

- 2.13 As outlined above, the costs associated with all construction related projects has increased dramatically over the last few years meaning that we can build less with the same level of financial allocation. As such, and as outlined in the strategic approach to the Town and Community Hub programme, investing in the existing estate is a key strand. This focussed investment facilitates the transitioning of the existing estate to a more community centred asset, within the heart of the local communities they serve. Such an approach provides opportunities to transition more assets, more quickly, to meet wider community needs.
- 2.14 This should also positively influence occupancy/capacity, where the existing school is underpopulated and excess spaces could be repurposed for alternative community, council or partnership activities – thus improving operational activity at the campus, whilst improving the occupancy/capacity ratio – as rooms and spaces reallocated are removed as ‘school spaces’ and therefore deducted from the ‘capacity’ side of the calculation.

Strategy and Vision – Invest and Rationalise

- 2.15 Finally, the Town and Community Hub programme will look for opportunities to make the estate more efficient for the communities we serve, by looking for opportunities to bring establishments together, thus making them more sustainable. This may be where existing establishments can be merged together in one existing campus but it may also be to look at new builds which then facilitate mergers. This is not a new concept and the council has successfully merged schools – such as the new Riverbank Community Hub which brings together the pupil populations from both Carnbroe PS and Sikeside PS.
- 2.16 Similarly, the hub model will look for opportunities to create 3-18yr establishments which can offer more hub related activities with all parts of the population, including our youngest nursery pupils benefiting from interaction with peers in primary and secondary sectors. Again, this is not a new concept and has been effective in both Clyde Valley/Orchard; and though the current programme (within Chryston) - where a new community hub is created for the primary sector, a 500 pupil extension is in development for the secondary sector, and where third sector partners in early years will collectively provide a ‘through campus’ for this locality.

Responding to long term population projections

- 2.17 As noted by the FPAG group at their first meeting, it was noted that there are schools with under occupancy and this review will look to address this, via the strategies

outlined above. This approach also recognises the long-term population projections which predict a fall in populations alongside a changing demographic.

2.18 There are three key groups of populations:

- a) Children and young people (those under 16 years of age)
- b) Working age population (ages 16 to 64)
- c) Older adult population (ages 65 and over)

2.19 As shown in the table below, the population projections for children and young people are expected to decline quite significantly:

Number of under 16 year olds	2018	2018 - 2028	2018 – 2043
Pre school children	18,330	-1,730	-1,950
Primary school children	28,610	-4,110	-5,090
Secondary school children	16,020	-310	-2260

Table 1 – Population projections (2018): Children and young people

2.20 The distribution between groups is anticipated to shift, placing more demand on services for older adults than on children and young people. As Town and Community Hubs look to serve the needs of the local population, there are opportunities to adapt the existing school infrastructure in the short to medium term, to mitigate the impact of this population shift and adapt our buildings to meet this changing need.

% of the NL populations	2018	2018 - 2028	2018 – 2043
Under 16 years old	18.5%	16.7%	15.9%
Of working age (age 16 to 64)	64.4%	63.0%	60.1%
Aged 65 and over	17.0%	20.4%	24.0%

Table 2 – Population projections (2018): Distribution of population groups

2.21 When attaching population figures to the above groupings, it is clear that the population of North Lanarkshire is anticipated to place different demands on services, than would have been the case many years ago when schools and centres were built.

	Total NL Population	Age under 16	Working age 16-64	Age 65+	Age 65 to 74	Age 75+
2018	340,180	62,960	219,220	58,000	33,430	24,570
2018 – 2028	+990 0.3%	-6,150 -9.8%	-4,330 -2.0%	+11,470 +19.8%	+6,110 +18.3%	+5,360 +21.8%
2018-2043	-3,010 -0.9%	-9,300 -14.8%	-16,670 -7.6%	+22,960 +39.6%	+5,400 +16.2%	+17,560 +71.5%
2043	337,170	53,660	202,550	80,960	38,830	42,130

Table 3 – Population projections (2018): Predicted NL population figures

Timescales

2.22 There are four phases to most transition plans: Plan; Do; Review; Implement.

2.22.1 Plan: This paper outlines what we plan to do – review the estate from three perspectives as outlined above:

- a) Invest (New build) – including identifying priority projects for the next capital plan, and subsequent plans.
- b) Invest (Existing) – identify strategic locations which match the aspirations of the Plan for North Lanarkshire, and look to create community capacity within the existing estate by adjusting the facilities and spaces within our existing estate.
- c) Invest and rationalise – A blend of both perspectives above, with more of a focus on creating opportunities to integrate and streamline the size of the learning estate first and foremost. This fits with the aspiration to manage the under occupancy in some parts of the school estate, whilst identifying opportunities to integrate other sections of the population such as our increasing older adult population.

2.22.2 Do: A follow up paper will present the diagnostic data which will inform the process. This data will include information on how particular projects score against the prioritisation matrix and the potential opportunities this will provide.

2.22.3 Review: The outcome from the “doing exercise” will identify the specific projects which will be the focus of capital bid submissions and proposals for further detailed design and investigation with a view to prioritising investment in future capital plans. This will, if practical, be presented ahead of bids being finalised for the new capital programme.

2.22.4 Implement: Budget allocated from the capital plan will thereafter form the projects associated with the Town and Community Hub programme budget allocation, and associated education capital programme.

3. Measures of success

3.1 Clear alignment between the funding allocation for the Town and Community Hub projects contained within the Transforming Places Programme of Work, and The Plan for North Lanarkshire.

3.2 Investment in the existing school estate to transform these assets, to adequately address the needs of the local communities they serve.

4. Supporting documentation

Appendix A – Prioritisation Matrix (as agreed at Policy and Strategy, March 2020)



James McKinstry
Chief Officer (Asset and Procurement)

5. Impacts

<p>5.1 Public Sector Equality Duty and Fairer Scotland Duty Does the report contain information that has an impact as a result of the Public Sector Equality Duty and/or Fairer Scotland Duty? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact?</p> <p>If Yes, has an assessment been carried out and published on the council's website? https://www.northlanarkshire.gov.uk/your-community/equalities/equality-and-fairer-scotland-duty-impact-assessments Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>5.2 Financial impact Does the report contain any financial impacts? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, have all relevant financial impacts been discussed and agreed with Finance? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact?</p>
<p>5.3 HR policy impact Does the report contain any HR policy or procedure impacts? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, have all relevant HR impacts been discussed and agreed with People Resources? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact?</p>
<p>5.4 Legal impact Does the report contain any legal impacts (such as general legal matters, statutory considerations (including employment law considerations), or new legislation)? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, have all relevant legal impacts been discussed and agreed with Legal and Democratic? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, please provide a brief summary of the impact?</p>
<p>5.5 Data protection impact Does the report / project / practice contain or involve the processing of personal data? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, is the processing of this personal data likely to result in a high risk to the data subject? Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes, has a Data Protection Impact Assessment (DPIA) been carried out and e-mailed to dataprotection@northlan.gov.uk Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>5.6 Technology / Digital impact Does the report contain information that has an impact on either technology, digital transformation, service redesign / business change processes, data management, or connectivity / broadband / Wi-Fi? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> If Yes, please provide a brief summary of the impact?</p>

Where the impact identifies a requirement for significant technology change, has an assessment been carried out (or is scheduled to be carried out) by the Enterprise Architecture Governance Group (EAGG)?

Yes No

5.7 Environmental / Carbon impact

Does the report / project / practice contain information that has an impact on any environmental or carbon matters?

Yes No

If Yes, please provide a brief summary of the impact?

5.8 Communications impact

Does the report contain any information that has an impact on the council's communications activities?

Yes No

If Yes, please provide a brief summary of the impact?

5.9 Risk impact

Is there a risk impact?

Yes No

If Yes, please provide a brief summary of the key risks and potential impacts, highlighting where the risk(s) are assessed and recorded (e.g. Corporate or Service or Project Risk Registers), and how they are managed?

5.10 Armed Forces Covenant Duty

Does the report require to take due regard of the Armed Forces Covenant Duty (i.e. does it relate to healthcare, housing, or education services for in-Service or ex-Service personnel, or their families, or widow(er)s)?

Yes No

If Yes, please provide a brief summary of the provision which has been made to ensure there has been appropriate consideration of the particular needs of the Armed Forces community to make sure that they do not face disadvantage compared to other citizens in the provision of public services.

5.11 Children's rights and wellbeing impact

Does the report contain any information regarding any council activity, service delivery, policy, or plan that has an impact on children and young people up to the age of 18, or on a specific group of these?

Yes No

If Yes, please provide a brief summary of the impact and the provision that has been made to ensure there has been appropriate consideration of the relevant Articles from the United Nations Convention on the Rights of the Child (UNCRC).

If Yes, has a Children's Rights and Wellbeing Impact Assessment (CRWIA) been carried out?

Yes No

Prioritisation Matrix

