

## **Learning Estate Strategy Update**

**Report by Fiona Robertson, Executive Director, Children, Young People & Partnerships**

### **Report for Decision**

#### **1 Recommendations**

The Council is recommended to note the content of this update report and the progress made towards the delivery of the Midlothian Council Learning Estate Strategy 2017-2047; and

- a) Agree the prioritisation of Learning Estate projects through to 2027/28 as outlined in Section 5 of this report in order to meet essential learning estate requirements over that period which will be the subject of review and regular reporting to Council, also to;
- b) Ask officers to undertake further work on the financial implications of the prioritised projects so that these can be considered as part of the Council's Capital Strategy and General Service Capital Plan report to be presented to Council, and;
- c) Ask officers to develop further the Learning Estate Additional Support Needs (ASN) Strategy as outlined in Section 6 of this report and bring a report back to Council for further consideration.

#### **2 Purpose of Report/Executive Summary**

To provide an update to Council on the 2017-2047 Midlothian Learning Estate Strategy and ask Council to agree the prioritisation of projects as outlined within the report.

**Date: 28 November 2022**

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### 3 Background

- 3.1 A strategic approach to the Learning Estate is required to ensure that the Council meets its statutory duty to ensure that there is adequate and efficient provision of school education in the area. The education authority must ensure that there is a sustainable learning estate plan, which maximises educational benefits for all children and young people. Developing a programme to maintain and sustain existing learning estate facilities as well as delivering new builds as required, removes associated risks, such as poor condition school buildings and backlogs in building maintenance and lifecycle. This approach also better informs the Capital Plan, investment and budget setting process.
- 3.2 Midlothian Council is committed to delivering on its vision and ambition for its communities and understands the important role of sustainable, vibrant learning communities in realising its objectives and goals. The Council also wishes to deliver on its commitment to improving outcomes for children and young people across all communities. A 'One Council' strategic approach, supported by our key stakeholders and partners is being taken to ensure our learning estate supports the Council to achieve its vision for all children, young people and its communities.
- 3.3 The 2017-2047 Midlothian Learning Estate strategy was agreed at a meeting of full Council on 26<sup>th</sup> September 2017 (Appendix 1). Council agreed the short-term strategy (2017-2023) as well as acknowledging the essential requirement and benefits of preparing a long-term strategy for the Learning Estate. Council noted the indicative strategy for the medium and longer terms, which were to be the subject of review and regular reporting to Council.
- 3.4 An update to the 2017 Learning Estate Strategy was presented to full Council on 7<sup>th</sup> May 2019, where Council was asked to note the work that officers were undertaking, as well as the following changes to the strategy:
- A third non-denominational school for Dalkeith, located at Kippielaw, two-stream (Council, 8 May 2018);
  - A third non-denominational school for Mayfield Easthouses, located on the former site of Newbattle High School, two-stream (Council, 12 February 2019);
  - The replacement of the Mayfield School Campus (Council 8 May 2018);
  - An extension to Newtongrange Primary School to bring it up to three-stream (Council, 12 February 2018)

A further update to the Learning Estate Strategy was presented to Council on 20<sup>th</sup> August 2019. The purpose of that report was to update Council on the work undertaken to review and prioritise the Learning Estate Strategy projects in order to arrive at a more affordable position.

## **Progress to date**

- 3.5 The Council has responded positively to the significant challenges presented by one of the highest population increases in the country, ensuring adequacy of enabling infrastructure and more specifically provision across our Learning Estate has been a central pillar of work undertaken to deliver the approved Local Development Plan (LDP). This has included the delivery of a number of new primary schools, including Gore Glen, Bilston, Danderhall, Early Burnbrae, St Mary's RC PS and Paradykes. Since the 2017 Learning Estate Strategy was agreed, the Council has invested significantly to provide enhanced learning environments for children and young people. Developer contributions and Scottish Government funding have supplemented this investment. Further detail on the scale and scope of the Council's investment can be found in Appendix 2.
- 3.6 Since the development and publication of the Midlothian Council Learning Estate Strategy 2017-2047 the Scottish Government published the National Learning Estate Strategy – Connecting People, Places and Learning 2019, in which they set out 10 guiding principles which aimed to support local authorities with their prioritisation for planning and investment in the learning estate. The Scottish Government's ten Guiding Principles were factored into our successful Learning Estate Investment Programme (LEIP) submissions for the replacement Beeslack Community High School, refurbishment of Penicuik High School and new Mayfield campus. In December 2020, Scottish Government confirmed that they would provide funding support for the replacement of both Penicuik High School and Mayfield and St Luke's Primary schools in addition to previous funding awarded for a replacement to Beeslack CHS.
- 3.7 The COVID-19 pandemic, closure of schools and subsequent restrictions on access to school buildings, has had a significant impact on the progress of planned learning estate projects. As a result, the timeline for the delivery of a number of projects has slipped leading to additional pressures on the school estate, particularly capacity in some areas of the county.

## **Revised Learning Estate Investment Plan**

- 3.8 This Learning Estate Strategy update retains the clear focus and intent set out within the initial strategy, mainly to deliver high-quality 21st century learning environments, which meet the needs of individual children and the wider community. These improved, flexible and adaptable learning environments will support learning, teaching and assessment across the curriculum as well as providing safe, nurturing environments that supports children's wellbeing. This is even more important given the impact of the pandemic on children's social and emotional needs. It continues to be our aspiration that these facilities will enhance and support communities.

- 3.9 Despite huge improvements in the physical fabric of many buildings and the delivery of new Primary and Secondary schools, it is recognised that further improvement and delivery of new builds is required to enable the Council to deliver efficient and adequate education provision. Work is progressing to ensure future investment in the School Estate is planned, managed and delivered in line with empirical data and an overall strategy for the Learning Estate. This report also highlights the many challenges facing the Learning Estate in Midlothian and seeks approval for an updated Learning Estate Investment Plan which is fit for purpose, responsive to changing population patterns, sustainable in the longer term, and accessible to all. The strategy will provide learning environments to deliver 21st century education as part of a wider place-making agenda.
- 3.10 The learning estate is a significant and valuable resource for the communities within Midlothian. The ongoing revenue costs for the learning estate and the capital costs of providing facilities fit for the future are significant. It is therefore vital, in light of these material costs, that the Learning Estate is managed and planned in an efficient, effective and strategic manner and that all priorities meet the wider strategic objectives of the Council as well as the needs of our communities.

## 4 Revised Learning Estate Investment Plan Considerations

The updated and revised proposals to the Learning Estate Strategy 2017-2047 take cognisance of the need to having a compliant, well-maintained, suitable, sufficient, sustainable and accessible Learning Estate. The following national and local performance data have been reviewed to inform the update to the Learning Estate Strategy 2017-2047 and project prioritisation process.

### 4.1 Core Facts

Robust data and background information must underpin the Learning Estate Strategy and the Scottish Government Core Facts Guidance (November 2017), sets out the objectives for the 21st century school; to deliver better public services that focus on:

1. The child at the centre – meeting the needs of individual children;
2. The school at the heart of the community – meeting the needs of communities.

Core facts measure **condition**, **sufficiency** and **suitability** and enable Midlothian Council to meet the immediate objective of capturing a broad strategic picture of the Learning Estate. They are a critical factor in determining investment priorities and are reported annually to Scottish Government. These core facts allow the Council to measure the Learning Estate performance against all other local authorities in

Scotland against a National Framework of Performance Criteria. Details of current school condition and suitability can be found in Appendix 3. These surveys are required to be carried out on a rolling 5-year cycle; this will highlight the lifecycle costs of each building and ensure the Council produces robust asset management plans. This information should be included in annual update reports to Council.

### **Condition**

Building condition will continue to be established by assessing the performance of individual elements from A – D scoring, where:

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	Economic life expired and/or risk of failure.

In addition to bringing clarity and consistency to the condition survey process, the refreshed Condition Core Fact Guidance also stipulates that a full condition survey of the school estate should be carried out at least every five years and, that between the full condition surveys, the condition data should be reviewed at least on an annual basis, using a risk based assessment. Dates are also to be recorded to demonstrate when full surveys and annual intermediate surveys have been undertaken, with these to be provided to Scottish Government when requested as part of the Annual Core Fact Return.

The refreshed Condition Core Fact Guidance also puts an onus upon local authorities to demonstrate that key statutory, and non-statutory, property compliance matters are addressed to demonstrate compliance as part of a greater emphasis on safer buildings. As part of future Core Fact Returns, local authorities are to provide inspection dates for the undernoted items with physical, electronic, copies to be provided upon request:

- Asbestos
- Electrical
- Fire Safety Risk Assessment
- Gas Appliances
- Health and Safety File
- Water Hygiene and Safety

### **Suitability**

Suitability is a measure of whether a school is fit for the purpose of delivering the curriculum. That is whether the design and layout enhance its function and use, whether there is space and scope to accommodate all the pre-school, day-school and after-school demands and services and whether it is 'inclusive' and accessible. The

assessment covers five key areas for primary schools with an additional key area included in the secondary assessment.

These are:

General Learning and Teaching, Practical Learning and Teaching (Secondary only), Internal Social, Internal Facilities, External Social and External Facilities.

These key areas are then broken down by relevant subjects/areas that impact the title area. Subjects/areas are then scored on the following criteria:

- Functionality
- Accessibility
- Environmental conditions
- Safety and Security
- Fixed furniture and fittings

Each individual aspect covered is graded as follows:

Grade	Definition
A	Performing well and operating efficiently
B	Performing well but with minor problems
C	Showing major problems and/or not performing optimally
D	Does not support delivery of service, seriously impedes delivery of activities

### **Sufficiency**

Sufficiency is concerned with capacity of the School Estate and has three elements: physical capacity, the school roll and projected trend and projected occupancy.

In order to maintain our schools to ensure they have good, an A or B rating, for Condition and Suitability, there requires to be an annual capital allocation to replace lifecycle elements such as windows, roofs, heating systems when they are due to be life expired. Without this continued investment, schools will lapse into poor condition and suitability buildings and will be costly and problematic to upgrade. With planned, strategic investment of the estate that we wish to maintain, the life of these assets will be extended; we will ensure they are fit to provide a high quality education for all; and our communities will continue to benefit from the local facilities.

It is normal practice for Council's to have a 5 year Asset Management plan in place for each individual school. This would ensure investment is focused on sustaining and where possible improving the performance of these critical assets, prioritising compliance and condition.

It is proposed that officers from across Place and Children, Young People and Partnerships Directorates develop a Learning Estate Asset

Management Plan to identify the establishments that will benefit from investment.

## **4.2 School Roll Projections**

The Education Service commenced a review of the school roll projection methodology December 2021. This review was undertaken to refresh and update school roll projections, evaluate existing methodologies and calculations. The methodology and data was then benchmarked against other local authorities with similar levels of demographic growth. As would be expected levels of accuracy can reduce over the years, so it is prudent to take a 5 year roll projection as a guide. The data is reviewed bi-annually against the Housing Land Audit in June and census data in September. Birth data and stay on rates are also factored in.

In Midlothian, we have a number of schools at or close to 100% capacity and some will breach their stated capacity in the next few years. These schools will require additional classes and core accommodation to ensure they are suitable and the Council fulfils its statutory duties. These capacity breaches are one of the main priorities to address as part of this update.

## **4.3 Inclusion**

The following is an extract from the Learning Estate Strategy 2017-47 “In line with Scottish Government’s continuing presumption of mainstream education, planning for inclusion must be at the forefront of new school design. Recommendations around all pupils being able to be educated within their own local community and not being transported outwith will mean equipping our local communities with the environment and resources to get it right for every Midlothian child. In Midlothian, we are progressing the implementation of Nurture in both Primary and Secondary Schools. Careful consideration of placement within the building is key to getting it right for specifically designed nurture spaces. In addition to this we must plan for the increase in pupils with Additional Support Needs as the pupil population grows, in Scotland 1 in 3 pupils have an additional support need, the levels of pupils with significant complex needs and severe and profound needs will increase in turn and this will require Midlothian Council to evaluate the current specialist school provision (Saltersgate) for severe and profound, as well as our complex needs enhanced provisions. New secondary schools should be able to be self sufficient in supporting pupils with a range of complex needs, and planning of location and size of these spaces must be done in conjunction with specialist staff. Moving forward, we aspire to ensure that each learning community is equipped to support pupils with a range of complex needs in Primary and Secondary Schools, therefore communities that currently do not have complex needs provision need to have this planned into future School builds where identified.

We also have a growing number of pupils that require alternative education provision, numerous factors contribute to this from social & emotional needs and mental health. Therefore we should be planning strategies that allow these pupils to remain within Midlothian Council for their education, this will require settings where there can be a focus on life skills and skills for work, in addition to being able to deliver classroom based learning.'

Whilst this remains our intent, currently, many schools, including recent new builds, do not have the nurture space or specialist areas to support children and young people who require additional support for learning. An extensive review of the ASN learning estate has been carried out with clear recommendations as to how to improve existing provision as well as provide for increasing need.

The Vision for Inclusion set out in the original strategy remains sound and now informs all planned extensions, refurbishments and new builds. It is important to recognise that the delivery of an inclusive learning estate requires investment in order for the Council to meet its statutory duties with regard to the ASL Act.

When briefing and planning for our new schools such as Easthouses PS, Mayfield Campus and the replacement Beeslack CHS we are ensuring that nurture spaces as well as specialist provision are integral to the design. This forward planning will allow the council to be more strategic regarding ASN capacity planning with the potential to reduce the number of children transported out of Midlothian to receive specialist education.

Midlothian Council is experiencing unprecedented challenge to provide the learning environments for children and young people with additional support for learning needs. Further detail can be found in Appendix 4.

The prioritisation of learning estate projects takes account of the need to provide for children and young people who require additional support within mainstream and more specialist settings.

The following projects have been prioritised as enabling the Council to meet the needs of children and young people and its statutory duties.

- Replacement Beeslack CHS
- Mayfield Campus
- Easthouses PS
- Hawthornden refurbishment and extension (to enable Lasswade HS provision to move into refurbished Mount Esk nursery)
- Shawfair schools

#### **4.4 Digital Inclusion and Learning**

Midlothian Council's decision to invest in the Equipped for Learning programme, providing every child with a digital device P1-S6 is making a significant contribution to equipping our learners with skills required for life and work beyond school. Digital technology gives pupils the tools to take greater control of their learning with the ability to access materials on their device at any time. By using the Google workspace platform, widely recognised across industry, pupils will be empowered to develop digital skills for the workplace.

Midlothian Council is at the forefront of digital learning and we must ensure our estate supports and enables this in the future. As each



learner has a digital device, we can look at alternative methods of curriculum delivery to ensure all learners can have access to a broad curriculum offer. The brief and design for new schools at Shawfair, Mayfield and Beeslack, will look to provide learning theatres which can cast lessons to other schools in the authority, meaning pupils can access a broader range of courses and qualifications.

The education service will continue to liaise with central digital services to develop plans and the investment in infrastructure required to support the Equipped for Learning programme and enhanced delivery of the curriculum through digital technology.

## 5 Prioritising Learning Estate Investment Projects

The Learning Estate Strategy 2017-47 investment proposals have been prioritised taking into account demographic change, impact of the pandemic and revised data.

### LEIP (Learning Estate Investment Plan) funded projects

LEIP projects are part funded by the Scottish Government with a stated delivery timeframe. Due to the impact of the pandemic, some flexibility has been built into the timeframes. The Scottish Government has provided LEIP funding to support the delivery of:

- **A replacement Beeslack CHS** (Estimated completion 2026/27)
- **A new Mayfield Primary Campus** which incorporates Mayfield PS, St Luke's RCPS and Mayfield Nursery (Estimated Completion 2025)
- **A refurbishment and extension of Penicuik HS** (Estimated completion 2027/28)

### School Capacity Breaches

We have a number of schools across the estate where the school capacity will breach if investment projects are not progressed resulting in insufficient pupil places to fulfil our statutory responsibilities. These schools are:

- **Kings Park PS** breaches August 2023
- **Rosewell PS** breaches August 2024
- **Roslin PS** breaches August 2024
- **Woodburn PS** breaches August 2024
- **Bilston PS** breaches August 2026
- **Mauricewood PS** breaches August 2027

### Projects in Planning

These projects will continue to be monitored and plans progressed by Education in conjunction with Place Directorate colleagues. Some of the projects listed in this tranche are significant infrastructure projects and will require a lead in period to plan, design and fund the proposals.

Some projects have funding in the Council Capital Plan or secured through developer contributions.

- **HS12 PS Bonnyrigg** Housing site not yet in progress, school anticipated to be fully developer funded to accommodate pupils from this development.
- **Gorebridge HS** – an option appraisal to identify a suitable portion of land to provide a new secondary school to serve the Gorebridge catchment. Require to identify project team to undertake informal consultation with the community and key stakeholders to inform future development of the school.
- **Shawfair Schools' solution** – A number of schools are required to accommodate the pupils from the Shawfair development's, including a 3-18 campus and a separate primary school.
- **Hawthornden PS extension and ASN works** – plan to develop dedicated bespoke ASN provision and future school expansion.
- **Newtongrange PS refurbishment** – complete upgrade and refurbishment of school to improve Condition and suitability.
- **Redheugh PS Gorebridge** - Housing site not yet in progress, school anticipated to be fully developer funded to accommodate pupils from this development.
- **Lasswade PS refurbishment and extension** Works to upgrade internal layout and provide additional core accommodation.

## 6 Report Implications (Resource, Digital and Risk)

### 6.1 Resource

The Capital Plan continues to support investment across the Learning Estate further through the block allocations and remains under review to confirm affordability and deliverability. Through the current and future Local Development Plan, appropriate levels of developer contributions will be sought to support required additional infrastructure and facilities from new housing developments.

### 6.2 Digital

The IT requirements of the proposed strategy and cost implications will be developed as part of the specifications for each school project.

### 6.3 Risk

If the Council does not have a funding strategy for the delivery of the learning estate there is a risk that the Council will not have a place for every pupil at their catchment school. There is a risk that without an agreed strategy Council will be in a weaker position to bid for and secure Scottish Government funding. There is a risk that without having a Learning Estate Strategy in place the Council will not secure the

appropriate level of S75 contributions required to deliver additional capacity arising from housing developments.

There is a risk that the funding required to deliver the strategy will require a level of prudential borrowing that will only be affordable if other capital projects are deprioritised and/or further savings are secured in the revenue budget to provide the capacity in the revenue budget to meet the costs of additional prudential borrowing. There is a financial risk in that if the levels of appropriate funding are not provided to deliver the Learning Estate Strategy, then the Council may not meet its statutory obligations in terms of the availability of sufficient school places.

There is a legal risk to these proposals – the terms of the School (Consultation) (Scotland) Act 2010 and other legislation can limit the Council's ability to proceed with certain proposals regarding permanent changes to the Learning Estate. These risks can be mitigated by ensuring adherence to the legislation and its processes and by carrying out robust and extensive pre-consultation engagement with the communities in the directly and indirectly affected communities regarding the provision of education.

#### **6.4 Ensuring Equalities (if required a separate IIA must be completed)**

Individual Integrated Impact Assessments will be undertaken in respect of all future recommendations in terms of the Learning Estate Strategy.

#### **6.5 Additional Report Implications (See Appendix A)**

See Appendix A

### **Appendices**

**Appendix A – Additional Report Implications**

**Appendix B – Background information/Links**

## APPENDIX A – Report Implications

### A.1 Key Priorities within the Single Midlothian Plan

- Individuals and communities have improved health and learning outcomes
- No child or household living in poverty
- Significant progress is made towards net zero carbon emissions by 2030

### A.2 Key Drivers for Change

Key drivers addressed in this report:

- ☐ Holistic Working
- ☐ Hub and Spoke
- X Modern
- X Sustainable
- ☐ Transformational
- ☐ Preventative
- ☐ Asset-based
- X Continuous Improvement
- X One size fits one
- ☐ None of the above

### A.3 Key Delivery Streams

Key delivery streams addressed in this report:

- X One Council Working with you, for you
- X Preventative and Sustainable
- X Efficient and Modern
- ☐ Innovative and Ambitious
- ☐ None of the above

### A.4 Delivering Best Value

The updated Learning Estate Strategy Review will almost certainly have significant financial implications and will therefore heavily influence the Council's Capital Investment Plan and long term Revenue Financial Planning. It will also inform the next Local Development Plan and related supplementary guidance, with enabling developer contributions being of considerable importance. Continuing investment to ensure learning estate facilities are fit for purpose will reduce maintenance and life-cycle costs

### A.5 Involving Communities and Other Stakeholders

This report presents the review of the Learning Estate Strategy 2017-2047 and identifies a number of proposals which would be subject to informal and statutory consultation.

### A.6 Impact on Performance and Outcomes

The aim of this paper supports the priority to reduce the inequalities in learning outcomes by improving the quality of learning and teaching, leading to raised levels of achievement and attainment, by providing every child with the opportunity to attend school in their local community.

#### **A.7 Adopting a Preventative Approach**

The aim of this report supports the priority to reduce inequalities in learning outcomes by improving the quality of learning and teaching, leading to raised levels of achievement and attainment, by providing every child with the opportunity to attend school in their local community

#### **A.8 Supporting Sustainable Development**

The proposed Learning Estate Strategy supports sustainable development by outlining the short to long term requirements for the learning estate. This report takes into account the need to deliver fit for purpose schools across Midlothian which are sustainable while anticipating and acknowledging the needs and views of stakeholders.

## APPENDIX B

### **Background Papers/Resource Links** (insert applicable papers/links)

Building our Future: Scotland's School Estate

<https://www2.gov.scot/Publications/2003/02/16251/17422>

Building better schools: investing in Scotland's future

<https://www.gov.scot/publications/building-better-schools-investing-scotlands-future/> Scotland's Learning Estate Strategy: Connecting People, Places and Learning

Appendix 1 Midlothian Learning Estate Strategy 2017-2047

Appendix 2 Learning Estate Strategy 2017-2047 Update

Appendix 3 Core/suitability

Appendix 4 ASN Learning Estate Strategy Report