



Cyngor Bwrdeistref Sirol
MERTHYR TUDFUL
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County Borough Council

LEARNING DEPARTMENT

Service Asset Management Plan

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1. Introduction

The Learning Department consists of the following strategic service areas:

- Maintained Schools - 22 Primary Schools, 4 Secondary Schools, 1 Special School
- Centrally retained Schools - 1 Pupil Referral Unit
- School Improvement
- Additional Learning Needs and Inclusion
- School Planning, Support and Resources
- Community Wellbeing

The following Service Asset Management Plan (SAMP) sets out the current and planned future arrangements for the Learning department's property portfolio including key service priorities, future property requirements and key next steps for the ongoing development of the plan.

This SAMP is a core strategic document informing the delivery of the Learning Department's priorities in developing its portfolio of schools and other education building stock as a key part of the Council's Raising Aspirations Raising Standards (RARS) Strategy and of the delivery of the Council's Best Start priorities within the Recovery, Transformation and Improvement (RTI) plan. Also, the SAMP has key links to the Council's Corporate Maintenance Strategy and Carbon Management Plan.

This SAMP will be reviewed / updated accordingly on a regular basis, and any updates to the plan, progress and future services changes that will potentially have an impact on accommodation needs will be reported to the Education Services Leadership Team (ESLT) and to the Corporate Asset Management Group.

2. Purpose and Objectives of the SAMP

The overall objective of the Learning Departments SAMP is to improve standards of accommodation that are suitable for their purpose, and sufficient to meet the service's requirements including rationalising and re-aligning the property portfolio where appropriate. This plan is complimentary to the preparation of the Council's Asset Management Plan.

In order to achieve our objectives, we will:

- Ensure ongoing representation on the Corporate Asset Management Group;
- Undertake regular reviews of current assets and premises occupied by our services, considering efficiency proposals as appropriate;
- Consider how services are likely to change; and how these changes will impact on property needs over the next five years;
- Identify potential capital and revenue savings made as a result of property rationalisation and disposal. Additionally, we will review and agree an approach and identify associated costs of the operation and maintenance of the future property portfolio;
- Undertake property condition and suitability surveys of all the learning portfolio as part of a corporate programme of property surveys
- Undertake accessibility reviews and audits of all the learning portfolio in line with the Equalities Act 2010, as part of a regular programme of review
- Undertake sufficiency reviews of all the learning portfolio, particularly schools, to ensure provision of the right size accommodation in the right locations and a sufficiency of places meeting the demand across all sectors over the medium and long term.
- Undertake an annual review of the SAMP to ensure the plan remains current and accurate.

3. Existing Property Holdings

The majority of properties held within the Learning Department portfolio are schools. There are also other properties that provide Early Years, Youth and Adult Education services.

Each property is managed by a designated building manger, either the Headteacher or a service manager for non-school services. All non-operational property is usually managed by Corporate Property.

Please see attached schedule at **Appendix 1** which details the individual properties within the Learning Department portfolio.

4. Service Priorities & Future Property Requirements

4a. 21st Century Schools Programme

The 21st Century schools programme is of critical strategic priority to help the local authority achieve its objectives set out in the Raising Aspirations Raising Standards (RARS) Strategy, specifically; developing the environment for learning and ensuring there are appropriate, high quality teaching and learning environments providing sufficient school places for all children and young people.

The local authority's strategic aims for the 21st Century Schools Programme, as detailed in the Strategic Outline Programme (SOP), are as follows;

- To increase the provision of 'good' condition schools with suitable environments for teaching and learning i.e. condition and suitability grade A
- To provide the right size schools in the right location, ensuring a sufficiency of school places that meets the demands across all sectors over the long term
- To achieve these aims whilst delivering better economy, efficiency and effectiveness in the use of public resources. Specifically;
 - Economy - long-term value for money & affordability
 - Efficiency - higher proportion of school funding spent on pupils rather than buildings/services
 - Effectiveness - school buildings, environments, and co-location of services, contribute to an improvement in pupil outcomes, wellbeing and prospects for life

The seven objectives which underpin the aims of the 21st Century Schools SOP from Band B onwards are as follows

1. To remove all condition D and C school buildings from the local authority stock
2. To remove the significant surplus places across the secondary school sector and redress any surplus / sufficiency issues across the primary sector
3. To provide a sufficiency of places to meet increasing demand for specialist provision across both the Mainstream and Special School sectors.
4. To ensure the demand for WM education places is met over the short, medium and long term and to encourage growth in demand through making space available to community services that promote welsh language and/or welsh culture.
5. To provide additional space to accommodate increased provision of nursery education or childcare to three year olds to meet the demands of the 30 hrs childcare offer
6. To deliver more flexible use of school assets including co-location of integrated services such as community childcare providers, LA/community wellbeing services, health, therapies and improved community access to leisure and library facilities.

7. To optimise the overall 21st Century School Programme for the long-term, through project solutions that are achievable i.e. affordable and deliverable, within the overall programme envelope and in keeping with the sustainable development principle.

These objectives will inform strategic planning of all capital investment proposals in schools over the Band B period 2019-2026, into Band C and beyond, subject to further strategic review and change where necessary.

Band A 2014-2019

Band A was a five-year programme scheduled from 1st April 2014 to 31st March 2019. WG approval was provided to extend the project completion of the new build Ysgol Y Graig (YYG) school to 2021.

The following projects were undertaken by the Council as part of Band A.

- A major of refurb of Afon Taf High School circa £12 million was completed with handover and completion of the project achieved August 2017.
- A new build YYG School circa £7.3 million has been completed with handover and completion of the project achieved at the end of August 2021.

Band B 2019-2026

WGs specific investment objectives for approving Band B projects for the 21st Century Schools Programme was as follows:

- i. Condition of schools
- ii. Sufficiency of school places
- iii. Flexible use of assets – including co-location of services

In the first instance WG prioritised projects for investment based on the first two objectives; building condition and sufficiency.

Using the above criteria, the following projects were included in the Council's 21st Century Schools Band B programme with a total programme envelope of £57 million.

- Pen Y Dre 11-16 Secondary School major refurb project
- Goetre Primary School 3-11 New Build project, with co-located Busy Bees Flying Start provision
- 3-16 VA Catholic School New Build project, merging three primary schools; St Aloysius, St Illtyd's and St Mary's with Bishop Hedley High School into a single school.

These projects are at various stages of pre-construction, design development and consultation regarding preferred sites. Each of these projects are expected to be completed on or before summer 2024. The deadline for completing the projects in line with WG funding requirements is 31st March 2026

4b. Welsh Medium Education Capital Grant

The Welsh Medium (WM) Education Capital Grant is a key strategic funding stream made available by Welsh Government (WG) to target growth in WM education provision across Wales in line with the ambitions of Cymraeg 2050.

Tranche 1 Grant Funding

The local authority successfully bid for the first tranche of WM capital monies during 2018 in support of its Welsh in Education Strategic Plan (WESP) 2017-2020.

The following projects were approved by WG in 2019 with a total programme budget of £1.8 million

- Ysgol Rhyd Y Grug; an internal reconfiguration to provide an additional two classrooms, additional pre-nursery places and a specialist Learning Resource Base (LRB) for WM pupils.
- Current approved timelines are for project delivery by August 2023

- New single form entry WM primary school; new WM primary school to be located in one of the primary school properties vacated as part of the Band B programme. A new Cylch Meithrin early years provision will also be co-located with the school.

Current approved timelines are for the new Cylch Meithrin to be established from January 2022 onwards in the former Gurnos Nursery building. The school will be seeded as a satellite site of Ysgol Santes Tudful with a Nursery intake in 2022 and Reception intake in 2023. Completion of the capital project to upgrade the vacated premises will take place in 2024 following completion of the Band B projects.

WESP 2022-2032

In line with the requirements for all local authorities to develop a ten year WESP, WG have provided each LA with a ten year target to increase the number of seven year olds accessing WM education i.e. pupils in Year 1. These targets require the Council to increase the number of learners accessing Welsh in Year 1 to between 155 and 186 by January 2031, compared to 100 pupils in January 2020.

Tranche 2 Grant Funding

To support LAs achieve these new targets WG have made available a second tranche of capital grant monies with bids required to be made before the end of October 2021. There is also an expectation that future bids for 21st Century schools funding for Band C from 2026 onwards will reflect each local authorities' ambitions to meet the targets and action set out in their WESPs 2022-2032.

The local authority is currently undertaking feasibility studies in support of revised proposals for Ysgol Rhyd Y Grug and the third WM Primary school in order to maximise the increase in school places delivered by these projects to help meet the 10 year targets. Following the completion of the feasibility studies, a bid will be made to WG to access additional capital funding through this second tranche of WM capital grant. Project completion timescales will also need to be reviewed as part of this bid pending the revisions proposed.

4c. Early Years Childcare Offer Capital Grant

The Early Years Childcare Capital grant is a key strategic funding stream made available by WG to help support local authorities in the delivery of the 30HR national childcare offer through co-location of early years provisions (pre-school childcare, pre-nursery education, wrap around childcare) within school settings.

The following projects have been approved by WG.

Linked to 21st Century Schools Band A and B projects

- Ysgol Y Graig (YYG), co-location of Trefechan Toddlers Flying Start preschool within the new build YYG primary school (Band A) £234k **[completed Aug 2021]**
- Goetre Primary School, co-location of Busy Bees Flying Start preschool within the new build Goetre Primary school (Band B) £402k

Linked to WM Capital Grant projects

- Ysgol Rhyd Y Grug, additional 24 p/t maintained pre-nursery places for 3 year olds £268k
- Third WM Primary School, co-location of new Cylch Meithrin within the seedling school £373k

Other Pre-school Co-location projects

- Bedlinog Primary, co-location of Bedlinog preschool within Bedlinog Primary school £300k
- Dowlais Primary, co-location of Dwylo Bach preschool on same site as Dowlais Primary school £581k
- Pantyscallog Primary, additional works supporting Bobl Bach preschool Flying Start setting in the Annexe at Pant Primary £27k **[completed Aug 20]**

4d. Sufficiency of Nursery Education Places

In January 2020, Council approved the Nursery Education strategy aiming to provide part-time nursery education to all three year olds and full-time nursery education to all four year olds. To meet this strategic aim and ensure equity of provision across the County Borough the local authority has identified the following projects affecting English Medium (EM) schools, which would ensure all EM schools provide the full nursery offer:

- Cyfarthfa Park Primary – nursery class extension £150k (completion Sep 2021)
- Caedraw Primary – nursery class extension £110k - further scoping works required re cost and timescales

Additional provision is also required in the WM schools but this is being addressed as part of the plans identified in the WM Capital grant and also through use of the Reducing Infant Class Sizes grant (see below)

4e. Reducing Infant Class Size Grant

The following projects were approved by WG as part of the Reducing Infant Class Sizes (RICS) Grant funding stream.

- Ysgol Santes Tudful, a double demountable classroom to reduce infant class sizes in the short term (aligned to revenue grant funding) whilst increasing the capacity of the school and enhancing the nursery education offer to include full-time nursery for four year olds and part-time nursery for three year olds each January and April £661k [**Completed March 21**]
- Trelewis Primary, a double demountable classroom to reduce infant class sizes in the short term (aligned to revenue grant funding) whilst increasing the capacity of the school ongoing, alleviating pressure on pupil places. WG Grant £274k, Community Infrastructure Levy £268k and Capital programme £200k [**Completed June 21**]

4f. Non-operational Property

A number of school properties will be vacated as part of the above plans and the following considers any current plans regarding the sites/premises once vacated.

Ysgol Y Graig Primary – main school and nursery building

The Trefechan Toddlers preschool currently located in the former YYG nursery building will move into the new school building by the end of September following confirmation of their CIW registration. The vacated former YYG school buildings will then no longer have operational use within the Learning department portfolio and can be transferred to the corporate estate.

Goetre Primary

This is currently identified within the LDP for housing. A feasibility study is being carried out to assess the potential option for this to be the location of the new welsh medium school, as a satellite of Ysgol Santes Tudful.

St Aloysius, St Illtyd's, St Mary's and Bishop Hedley High School

Discussions have taken place with the Archdiocese of Cardiff regarding the transfer of the above school sites into the ownership of the local authority as part of the proposed Band B project to build a new 3-16 school. These discussions are dependent upon the outcome of this project. There are currently no definitive plans for these sites and further consideration is required in line with the scoping of future plans and property requirements.

4g. Improving the Condition of Schools

In support of the delivery of the RARS strategy and the Recovery, Transformation and Improvement (RTI) Best Start priorities, a comprehensive and holistic condition survey programme has been agreed for all schools and education buildings to be undertaken over 3 financial years between 2021 and 2024.

These surveys are being undertaken as part of the new 5-year corporate programme across all local authority buildings 2021-2026, with an annual budget secured from 2021 onwards. The surveys of schools / education buildings include an assessment of suitability for learning with respect to the building and surrounding environment as well as assessing the property condition.

The prioritisation of the buildings within the programme has been agreed based on an assessment of strategic priorities within the Learning portfolio as well as reflecting buildings with surveys overdue.

Please refer to **Appendix 2 Condition Survey Programme 2021-2024** that sets out the property condition surveys to be carried out for the Learning portfolio during the first three years of the corporate programme. Note, as reflected in the programme, the Learning Department used available revenue budgets during 2020/21 to support an early start to this programme on priority properties from November 2020 onwards.

This condition survey programme is critical to identifying strategic priority projects moving forwards and to informing an ongoing maintenance strategy for school buildings and future capital investment in maintenance over the medium and long-term including use of Welsh Government grant where appropriate.

5. Corporate Maintenance Strategy

To ensure that the Council's Property Portfolio is efficiently maintained in a manner that provides a safe, reliable and secure environment which complies with legislative requirements; a Corporate Maintenance Strategy has been developed.

The Strategy is a live document that sets out the current property portfolio, survey programme, condition scoring, associated maintenance spend and information on how the maintenance service is delivered. In addition, the document also details key actions required in order to meet its Strategy objectives.

In conjunction with Corporate Property Services the Learning Department has prioritised available corporate maintenance, capital programme and WG Capital Maintenance grant monies on addressing significant items of backlog maintenance including roof repairs and energy efficiency priorities such as new boilers and heating systems as well as safeguarding and health & safety issues such as new security gates, new flooring, paving slabs and guttering.

The WG Capital Maintenance grant is currently in its third consecutive year of funding but its availability is only announced late each financial year and is subject to available capital monies in year. Due to the late announcement of funds, WG do allow monies to be used to fund projects in the following financial period if required.

The Learning Department also operates a Mutual Fund for non-capital repairs and maintenance to support schools to address their own responsibilities for building repairs.

Please refer to **Appendix 3 'School Buildings Repairs and Maintenance'** that sets out the respective responsibilities for repairs and maintenance of school buildings between the local authority and schools.

As stated above the Condition Survey programme is critical to the ongoing maintenance strategy for school buildings and identifying future capital investment in maintenance over the medium and long-term. This is true both for maintenance undertaken by the Council and by the schools themselves as the condition surveys will identify the works required to be addressed and Corporate Property services will advise whether this responsibility falls to the Council or to the school in line with Appendix 3. Where responsibility falls to the school to carry out, schools will be asked to plan for these works in their repairs & maintenance expenditure as part of their school budgets and medium-term financial plans.

6. Energy and Carbon Management

In line with the Council's Carbon Management Plan the local authority has implemented the REFIT Cymru project across the majority of school sites in order to carry out a number of energy efficiency schemes including LED replacement lighting, lighting controls, BMS upgrades and solar PV panels. School projects have been included in excess of £700k with the capital expenditure being financed from Salix loans, with the projects being carried out over the next 12 months.

The projects will generate efficiency savings in energy use, reductions in carbon emissions and financial savings against school budgets due to reduced energy consumption. It has been agreed with the Schools Forum to reduce the funding provided to schools for energy use in their formula allocations in order to fund the loan repayments with individual schools' formula allocations being reduced by an amount equivalent to the energy savings generated following the completion of the respective REFIT projects will be implemented.

This ensures the schemes are cost neutral to the individual schools and to the Council as a whole, with savings being realised following the completion of the loan payback period.

The Learning Department are also working with Property Services and WG to explore the options around delivery net zero carbon schools as part of the 21st Century Schools programme. This requires significant additional investment that will be supported by WG up to the project intervention rate i.e. 85% for VA schools and 65% for other schools, with the local authority required to match fund the difference.

Options to deliver operational net zero carbon are currently being explored and approvals for additional cost implications will be required from both WG and Cabinet as appropriate.

7. Next Steps

The following next steps have been identified as key to determining emerging service priorities and further property requirements over the next five to ten years.

Band C 21st Century Schools Programme

The learning department is currently scoping high level proposals for Band C alongside colleagues from Property Services and Planning using the criteria of property condition and suitability, sufficiency of places including WM and specialist provisions and flexible use of assets.

This is consistent with the criteria used by WG to prioritise funding for Band B projects and these are again likely to feature as significant factors in determining funding for Band C although an additional criterion may be included around projects that address decarbonisation.

Band C is currently expected to commence from April 2026 onwards and the authority is likely to be required to submit bids at some point by or before mid-2024.

Planning of School Places (POSP) review and plan

The Learning Department will undertake an updated sufficiency review in 2021/22 of school places provided across all school stock over the medium to long-term, evaluating whether there is enough supply / surplus of places to meet demand in all sectors.

This review will consider updated pupil projections, school capacities including potential for internal reconfiguration, pupil growth expected from the Local Development Plan and the implications of growth in WM provision on corresponding EM school places.

The review will inform a medium to long-term planning of school places (POSP) plan in 2022/23 setting out recommendations to address any surplus and / or sufficiency of places expected to arise in the medium to long-term.

Potential solutions could include school reorganisation proposals, changes to catchment areas, building extensions and other capital works that generate additional capacity including internal reconfiguration works.

Accessibility Review and priority works

The learning department will undertake an updated accessibility review and audit of school stock in line with the consideration of the Equalities Act 2010 to ensure school sites and premises are appropriately assessed for all issues and barriers that prevent full compliance with the Act. This review will include an assessment of the works necessary to address the barriers and issues so that school premises can fully meet the requirements of the act.

A prioritisation of works will be undertaken in order to inform future bids to the Council's capital programme over the period of the medium-term financial plan.

Condition Survey Programme priority works

The condition survey programme will identify priority works for each school building as the surveys are undertaken and this will inform the capital maintenance programme of work for school buildings over the period of the medium-term financial plan including projects financed from the capital programme, the corporate maintenance budget and from the WG Capital Maintenance Grant for as long as this grant funding continues to be available.