

**REPORT TO EDUCATION AND CHILDREN'S SERVICES COMMITTEE -
11 October 2018**

CONDITION AND SUITABILITY CORE FACTS

1. Recommendations

The Committee is recommended to:

- 1.1 Note the changes to the methodology for assessing suitability and condition core facts.**
- 1.2 Agree that reports on outcomes be submitted to appropriate area committees and to the Education and Children's Services Committee.**

2. Background / Discussion

- 2.1 Property and FM and Education Service officers currently assess performance of the schools portfolio in line with Scottish Government guidance, "The Condition Core Fact", published in 2007, and "The Suitability Core Fact", published in 2008.
- 2.2 As part of the Scottish Government's response to inquiries, and subsequent reports, undertaken over the past 18 months relating to the condition of public buildings, the School Infrastructure Unit undertook a review of existing methodologies adopted by authorities and has subsequently published refreshed guidance for its Core Facts, which includes both Condition and Suitability assessments, for schools. This refreshed Core Fact guidance has been produced as the result of a collaborative venture between the Scottish Government, Scottish Futures Trust, Scottish Heads of Property Services (local authorities) (SHoPS), Education Scotland, Scottish Building Standards, Architecture and Design Scotland and the Association of Directors of Education in Scotland.
- 2.3 As part of this exercise, Aberdeenshire has been a key contributor throughout the development of these revised methodologies through its involvement with SHoPS sub-group tasked with this exercise. In addition, Aberdeenshire has also been supporting other authorities, as revised methodologies are implemented.

2.4 Condition

Condition is concerned with the current state of the fabric of the school and with safety and security. Condition has a direct impact on what goes on in the school. Appropriate forward planning and prudent, timely decisions on ongoing maintenance will best enable authorities to sustain the quality and asset value of their school buildings over the long term.¹

¹ The Condition Core Fact Building better schools: Investing in Scotland's future

- 2.5 Revised Condition assessment methodology builds upon previous Condition Core Fact guidance which set out an elemental approach/methodology to undertaking assessments. This elemental approach remains, although this is enhanced with a supporting, weighted, workbook for authorities to use, to ensure consistency in establishing condition and reporting.
- 2.6 In addition, revised Condition Core Fact guidance has been prepared to:
- Strengthen the risk-based approach to condition surveys through a raised awareness of the importance of effective risk management as an integral part of the facilities management regime;
 - Ensure greater uniformity in the scope and methodology applied to each school, by every authority, to minimise variations in assessment methods and criteria; and
 - Reduce the inconsistencies arising from different property officers or external contractors exercising varying, but equally valid, professional views, by setting out the framework within which judgements should be made.
- 2.7 Condition will continue to be established by assessing performance of elements as installed/its design intent, with these assessed on an 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
- 2.8 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 the Scottish Government, when requested, as part of annual Core fact return.
- 2.9 The refreshed Condition Core Fact guidance also puts an onus upon 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, authorities are to provide inspection dates for the undernoted items with physical, electronic copies to be provided upon request;
- Asbestos – presence of asbestos; management plan; number of asbestos incidents in last year.
 - Electrical (Fixed Electrical Installations) - date of latest inspection.
 - Fire Safety Risk Assessment - date of latest fire safety risk assessment.
 - Gas Appliances – presence of gas supply; date of latest inspection.
 - Health and Safety File – is there an up to date Health and Safety file.
 - Water Hygiene and Safety (Legionella Prevention) –legionella risk assessment; date of latest risk assessment; number of incidents in last year.

- Building Failure – number of teaching days lost due to school being closed owing to building failure.

2.10 As part of Aberdeenshire’s response to the implementation of this new methodology, Property and FM are recruiting additional Building Surveyors, along with Project Officer support. The appointment of these additional staff will commit dedicated resources to this key exercise, across all property portfolios, which will lead to consistency in survey reports and efficiency to the survey programme.

2.11 In parallel with a programme of condition surveys, an update of suitability assessments will also be undertaken. These assessments will take the form of utilising revised Scottish Government ‘The Suitability Core Fact’ guidance. All suitability assessments will be undertaken with the involvement of establishment heads, Asset Management and Learning Estates Team. This wider involvement ensures greater challenge, particularly on areas of poor performance, along with greater moderation of assessments.

2.12 Suitability

Suitability is a measure of whether a school is fit for the purpose of delivering the education 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.²

2.13 The assessment covers 5 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 & Security
- Fixed Furniture & 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

² The Suitability Core Fact Building better schools: Investing in Scotland’s future

The score assigned to each individual aspect feeds into the subject score which then feeds into a Key Area score and ultimately results in the School being assigned an overall Grade for Suitability. The overall score is currently calculated based on the following weightings:

Area	Primary Weighting	Secondary Weighting
General Learning & Teaching	50%	25%
Practical Learning & Teaching	N/A	25%
Internal Social Areas	15%	15%
Internal Facilities	15%	15%
External Social Areas	10%	10%
External Facilities	10%	10%

3. Methodology for Suitability 2018

- 3.1 Previous suitability was based on capacity; this method is based on the school roll. A significant change in school roll may also trigger a review of the school's suitability.
- 3.2 The suitability assessments will be carried out by Business Support Officers, supported by Head Teachers and CSN co-ordinators. The Learning Estates Team will provide training and will moderate the process. The completed workbooks will be collected, moderated and analysed centrally.

4. Outcomes

Assessing the Condition and Suitability of schools across Aberdeenshire allows the Service to monitor and enhance current facilities. The amendments to the methodology seek to improve consistency across Scotland and provide the opportunity to reassess and moderate in order to accurately focus enhancement budget spending.

5. Scheme of Governance

- 5.1 The Committee is able to consider this item in terms of Section E 3.1a of the List of Committee Powers in Part 2A of the Scheme of Governance, as it relates to setting school capacities, considering available accommodation and capping schools rolls.

6 Implications and Risk

- 6.1 An Equality Impact Assessment is not required because pupils will continue to be educated in line with nationally-agreed accommodation standards, and, by changing school capacities, there will not be a differential impact on any of the protected characteristics.
- 6.2 There are no direct staffing and financial implications arising from this paper.
- 6.3 The following Risks have been identified as relevant to this matter on a Corporate Level: Social risk (demographic change).

The following Risks have been identified as relevant to this matter on a Strategic Level: A Future Fit E&CS Estate.

6.4 There is no requirement for a Town Centre Impact Assessment.

Laurence Findlay
Director of Education & Children's Services

Report prepared by Maxine Booth, QIM, Learning Estates

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