

ASSET MANAGEMENT PLAN

STATEMENT OF PRIORITIES

2002 – 2007

Education Asset Management Team

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Our **CORE BUSINESS** is to deliver best value solutions in respect of education property assets in partnership with schools, Diocesan and Foundation bodies, property professionals and other stakeholders, on behalf of Birmingham City Council.

Education Asset Management Team
Birmingham Education Service

This business contributes substantially towards implementation of the 3 key themes of the Birmingham Education Service:

- PARTNERSHIP** → adding value to the education service in Birmingham through attracting external expertise and funding:
- ACHIEVEMENT** → providing buildings and facilities which help rather than hinder the teaching of the curriculum and contribute to raising standards:
- SOCIAL INCLUSION** → supporting the inclusion strategy through the design/funding of major co-location/ amalgamation schemes and other works to promote access.

If you have any comments about this Statement of Priorities, or wish to receive further information, please contact the Education Asset Management Team.

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1. CONTEXT

- 1.1 **Birmingham City Council's Best Value Performance Plan 2002-2003** identifies 'a learning city' as one of six key strategic themes. Emphasis within that theme is being given to two strands:
- improving local education standards – particularly for those in underachieving groups, and
 - increasing and extending lifelong learning and cultural opportunities.
- 1.2 The 2002-2003 **Cabinet Statement** recognises this decade as one "**when Birmingham is recognised as a place where its people and organisations provide examples of continuous successful learning. We are therefore determined not merely to improve on our previous best, but be at the leading edge of performance and practice**".
- 1.3 Birmingham Education Service will seek to deliver these aspirations, alongside its three key themes of **partnership, achievement and social inclusion**.
- 1.4 The 2002-2007 Local Education Standards Strategy (LESS) provides a broad strategic framework for the education service alongside these key themes, targets and indicators for measuring our performance. We are striving, in partnership, to be at the leading edge of performance and practice, in order to transform educational achievement in the city and opportunities for our citizens.
- 1.5 Five principles provide the educational service with a sense of continuity and stability in an environment subject to continuous change. They are:
- the need to promote **inclusive** not exclusive practice;
 - teaching and learning based on the assumption that intelligence is **muti-faceted**, not general and inherited;
 - a commitment to education as **Lifelong** rather than once and for all activity;
 - judgements of quality which relate to the extent of **improvement against previous best performance** within the context of benchmarking our success against schools and cities placed in comparable circumstances;
 - **celebrating success** rather than focusing on failure
- 1.6 All Education Development Plan targets for 2000 were achieved. Progress was again demonstrated in 2001, but key messages in comparing outcomes with targets include:
- target support on schools where overall performance and rates of improvement remain below the average for similar schools;
 - continue focus on transition and continuity of learning;
 - renew attention on groups at risk of underachieving where rates of improvement are not currently sufficient to close the gaps in performance;
 - target improvements in attendances in those schools where the rate is below 90% and/or unauthorised absences are above the national average.

1.7 In the context of the LESS, the action plan following the 2002 OFSTED/Audit Commission inspection report, and PSA, the following practical targets are identified:

- increase % of 14 year olds achieving level 5 at KS3
as follows -

English	56 → 67%
Maths	56 → 65%
ICT	59 → 67%
Science	54 → 60%
- increase % of pupils achieving 5 or more GCSE A-C
from 41% → 48%.
- increase average points score of 15 year olds from 36 to 39.

1.8 Alongside, and complementary to the PSA targets are three further key target areas to:

- increase % of statements of special need prepared within 18 weeks;
- reduce % of schools maintained by the LEA subject to special measures to zero by 2003;
- increase % of 11 year olds achieving level 4 in KS2 maths from 67 → 75%.

1.9 These educational priorities sit within the ethos of the Council's **Community Strategy** and **Corporate AMP/Capital Strategy**. The Community Strategy, for example, envisions the creation of a learning city partly through

- enhancing the quality of city schools;
- raising attainment levels in schools, first to national levels and then to the levels of most successful European cities;
- reducing the attainment gaps between the highest and lowest achievers;
- improving out of school and family based learning opportunities;
- raising substantially the level of literacy and numeracy for adults across the city;
- strengthening support for vulnerable children;
- enhancing the quality of post 16 education in the city and to increase attainment levels for disadvantaged post 16 groups;
- promoting and supporting lifelong learning in its broadest sense.

Alongside this the Corporate AMP/Capital Strategy recognises the role which appropriate infrastructure and facilities can play in developing this 'learning city', particularly if best value models are employed.

1.10 Delivery against these educational priorities and other government priorities is partly dependent upon meeting capital investment needs eg

schools causing concern/special measures – earmarked local funding for Managing Intervention Groups (MIGs); and major TCF expenditure to create an International School and Community College;

increasing diversity – piloting a collegiate academy approach and development of the Brasshouse Centre as an International Languages Academy;

wider behavioural initiatives – electronic registration, 'sporting playgrounds', implementation of the inclusion strategy and refurbishment of residential special schools all have a contribution to make;

security strategy – Seed Challenge and Dual Funding criteria reflect the health/safety and security agenda, as too does the selection of small scale suitability projects and workforce-related improvements. Schools are also able to fund high priority works using Devolved Capital.

1.11 Local factors which influence our priorities include

size - the LEA maintains 453 schools, the UK's largest adult education service, community day nurseries and related units/centres.

demography - 43% of our pupils come from black and minority ethnic communities, with 28% having English as an additional language, pupil mobility is high, running at 19% pa.

economics - eligibility for free school meals runs at approximately double the national average as does unemployment. Birmingham ranks 1st out of 354 districts on the 2000 Index of Deprivation.

1.12 As part of the 'E government' agenda, schools have access to a property web site providing advice, guidance and links to other relevant web sites. Schools also have direct access to the AMP data held for their school. Web site users are also encouraged to communicate with us by e mail. A pilot undertaking all communication with schools electronically has also taken place.

2. STRATEGIC PRIORITIES

2.1 emergency work (AMP) top priority

Our highest priority within the **Asset Management Plan** is to deal with urgent work to keep schools operational and deal with critical health/safety and security issues. This reflects DfES priority on 'security strategy' utilises the AMP database, and uses funding from a variety of sources, particularly DfES Seed Challenge and security funding, LEA Dual Funding and centrally-held revenue budget, and school resources (fair funding and devolved capital).

2.2 statutory duty to provide school places (SOP) (Class Size Plan) second priority

Births continue to fall and surplus places are predicted to rise as a result. (See **School Organisation Plan 'SOP'**). The size, numbers and mobility issues in Birmingham, however, continue to display a patchwork where there is acute shortage both short and long-term, in parts of the city, and in others, significant surplus. Vigilance is also required to comply with KS1 class size requirements. Our second priority is therefore to provide additional places where it is needed, (including expansion of successful schools where appropriate) and remove surplus places where it is not. The Rationalisation of School Places Working Group (RAT) meets regularly to review citywide trends and local demands utilising demographic data, and determines on whether places should be added or removed from an area. Main funding sources for this priority are DfES 'Basic Need' Annual Capital Guideline/Single Capital Pot, NDS Modernisation and TCF.

2.3 schools causing concern (LESS) equal priority

The removal of all LEA schools from special measures by 2003 is an ambitious target, contained within the **Local Education, Standards Strategy (LESS)**. This reflects DfES priority re: schools causing concern. Capital infrastructure work to address longstanding 'condition' related items or significant suitability issues, in partnership with governors (Devolved Capital), is a major feature of the centrally-held revenue budget. In addition, a major scheme is on site, funded by DfES TCF grant, to create the International School and Community College formerly accommodating two secondary schools each with significant educational challenges.

2.4 behavioural initiatives (LESS) (BIP) equal priority

A cross-cutting approach is being adopted to support improvement in this area, identified in the **Local Education Standards Strategy, Behavioural Improvement Programme** and DfES priority list; the contribution of AMP is largely through the development of a programme of playground improvements for 2003/4 and the piloting of an electronic registration system at several secondary schools. Both initiatives are funded through DfES earmarked grant.

2.5 targeted works re: educational achievement (LESS) equal priority

Various strands of the capital programme reflect the local drive, detailed in the **Local Education Standards Strategy**, and referred to in cross-cutting policy such as the **Neighbourhood Renewal Strategy** and **Community Strategy** to increase achievement – particularly with target groups/subject areas. This objective is picked up in DfES

priorities in respect of responding to National Curriculum requirements. The main relevant strands of the capital programme are:

- * replacement of non-permanent accommodation (NDS Modernisation)
- * small scale 'suitability' related schemes (NDS Modernisation)
- * replacement of whole schools and other major replacement works (PFI)
- * sports/arts and PE initiatives (earmarked grant, NOF)
- * maintaining ICT in Birmingham Schools at the leading edge (NGfL)

2.6 inclusion (Inclusion Strategy) (Lifelong Learning Development Plan) equal priority

Property-related aspects of our local inclusion strategy are progressed largely through one of four routes:

- * co-location/ amalgamation - where appropriate a special school co-locates onto a mainstream campus. To date 3 such projects have been included in the capital programme, and others are in feasibility stage. Funding from NDS, ACG/ SCP and TCF.
- * access - a rolling programme to deliver a minimum level of entitlement at all mainstream schools to facilitate inclusion where/when appropriate. Funding from DfES earmarked grant.
- * residential - a programme of targeted rationalisation/refurbishment work is being prepared for implementation in 2003/4 onwards following a review of this area. Funding from NDS Modernisation.
- * local initiative - schools applying for Seed Challenge or Dual Funding grant are asked to demonstrate if their proposal contributes to the inclusion agenda.

This objective relates to DfES priority re inclusion/SEN/DDA.

2.7 stewardship of existing fabric (AMP) equal priority

Notwithstanding the largely educational policies detailed above which property initiatives can support, and the opportunities for 'joined-up' thinking and funding, the condition data held within AMP permit the transparent prioritisation of major work in partnership with schools, Diocesan and Foundation Bodies and other educational stakeholders through the mechanism of the Property Working Group (PWG). Funding is provided through NDS (Condition), LCVAP, Devolved Capital, Seed Challenge, Dual Funding mechanisms and revenue R & M. Advice and guidance to enable them to deliver their responsibilities as custodians of their premises are also provided.

2.8 extended school agenda (Early Years and Childcare Development Plan/Corporate AMP) equal priority

Strategic addition and refurbishment to LEA nursery provision is being equally funded through DfES earmarked grant and LEA centrally-held revenue funding. Reflects the extension/integration of early education and care centres with nursery/community day nursery buildings and central government aspirations re: 'Children's Centres'. Also DfES priority regarding the extended school agenda, as too does the incorporation into the education service of adult education, youth centres, community day nurseries and family centres. This consolidation is likely to lead to property proposals wef 2003/4.

Shared use, multi-occupancy and inter-agency working are all features of Corporate AMP and discussions are taking place with Sure Start, LIFT, Primary Care Trusts etc regarding possible alliances in specific local areas.

2.9 supporting the 14-19 agenda (Lifelong Learning Plan) equality priority

Further analysis work is required in this DfES priority area but a need to create an inner city facility has already been established and a feasibility study is taking place to establish requirement, cost, and partners.

2.10 increasing diversity (LESS) equal priority

Local plans for a collegiate academy approach where the resources of a group of secondary schools are combined for agreed activities – building on the experience of the city's city learning centres and specialist colleges, is likely to require capital support wef 2003/4, as part of our strategy to transform secondary education. Funding at this stage is identified within NDS Modernisation/PPP. The development of the Brasshouse Centre into an 'International Languages Academy' is also relevant here.

2.11 workspace issues (AMP) equal priority

Analysis of AMP data, as reported to the PWG, has enabled the prioritisation of schemes to be funded through DfES earmarked grant, to improve staff workspaces and storage facilities in schools.

2.12 providing high quality and sustainable building design solutions (AMP) equal priority

Development funds within the property budget are required, and made available on an annual basis, to pilot initiatives to assess best value, to assemble property data, and to 'buy-in' external expertise as and when required. This is funded through the centrally held revenue budget. Staff training initiatives can also be funded in this way and participation in related networks eg Movement for Innovation, we are committed to embracing the Rethinking Construction agenda and the full implications of the DfES publication "Schools for the future – designs for learning communities".

Recently let PFI contract was awarded largely on the basis of quality criteria. Recent schemes have achieved national/local design quality recognition (eg Perry Beeches Phase 1, Cockshut Hill PFI, Moseley West Wing and Adderley J/I). Our commitment to

delivery choice to schools will drive up quality and our second PFI contract will seek innovative quality sustainability techniques.

3. **TIMESCALE**

The works programme related to the strategic priorities detailed above covers the period 2002-2007. Grounded in indicative allocations in the early years, the later years plans are provisional, based around funding projections. A summary of the programme appears as Annex A.

4. **IMPROVEMENT TARGETS**

4.1 **Progress against targets identified for 2002/3 in Local Policy Statement dated July 01:**

	Original Target (July 01)	Current Position (July 02)	Future Action
4.1.1	remove 1000 surplus primary places	1265 places have been removed	procedures in place to remove a further 1270
4.1.2	obtain satisfactory appraisal of sufficiency data by DfES	Government timescale revised, appraisal feedback now anticipated Summer 03	target to supply all schools with copy of CAD plans by March 05
4.1.3	action priority 1 condition work as identified	All priority 1 works completed	identify and fund newly identified priority 1 works
4.1.4	earmark NDS Condition fund in 2002/3 against C 2.1 priorities	Delivery against all C 2.1 works on roofs, external walls, windows, doors and heating systems	complete all C 2.1 works by March 2007
4.1.5	target devolved capital spend against AMP priorities	Schools completing forms to seek scheme approval plus detailed guidance and access to schools' condition and suitability data via web site	supplement through annual property action planning session at schools
4.1.6	obtain satisfactory appraisal of Condition Suitability data by DfES	obtained March 02 obtained December 01	maintain and improve processes
4.1.7	complete co-location of Priestley Smith School to Perry Beeches Campus	targeted Capital Fund bid for 2002/3 successful	target to have relocated school operational by September 03

4.1.8 obtain DfES approval to second PFI package provisional support obtained March 02 target to let contract Spring 04

4.2 Identification of targets now identified for 2002-2007 in response to need to include:

- baseline measure
- cost
- realistic consequential desirable outcomes

and are given in annex A.

5. CONSISTENCE WITH LOCAL POLICY STATEMENT

Our asset management priorities/targets are based around the:

- needs identified through the condition, suitability, sufficiency and premises data collection (see LPS 'Premises Information')
- consultation around the relative priorities of those needs with other stakeholders (see LPS 'Consultation' and 'Prioritisation')
- consistency of local targets with national themes (see LPS 'Commitment to the delivery of Government priorities')
- contribution which property-related work can make to improving educational achievement and pupil/staff well being.

6. MAKING BEST USE OF AVAILABLE FUNDS

6.1 Annex B gives an overview of indicative and potential funding schemes against the main priority areas and identifies contingency proposals where preferred source is dependent upon successful bidding.

6.2 As far as possible the focus will be on lowest lifetime cost, rather than patch and mend.

6.3 The success of Birmingham's AMP depends upon the strength of the partnership which stakeholders are willing to make, including the assembly of funding alliances, and the priority/time commitment which stakeholders are willing to make.

6.4 The Education Service has increased staffing in this area during the past twelve months and will do so again, in 2002/3, in order to play its part in delivering an education service for the twenty first century and raising educational achievement. In order to facilitate appropriate support from property professionals agreed roles/responsibilities/entitlement statements will be published in September 02 and it is hoped that a 'call-off' contract will be in place by April 03 to enable schools and LEA to access a pre-agreed level of service at pre-negotiated prices from one of a handful of experienced property professional organisations.

- 6.5 In line with DTLR guidance, all major projects will be benchmarked against time and cost criteria and a common quality criteria based around customer feedback will also be used – this will enable comparisons over time, and between different property professional organisations. The innovative web site and complementary 'School Property Handbook' and property planning sessions with schools should facilitate effective use of school resources and that they are used to complement other sources of finance.
- 6.6 PFI specifications and leading edge policy from our links with M4i should ensure that good and innovative design is maintained.
- 6.7 The Education Service is seeking Demonstration Organisation status from the Movement for Innovation in order to facilitate leading edge advice/support and peer assessment related to attempts to drive best value into the process. The delivery of choice and empowerment to schools; and the introduction of realistic benchmarking and Kpi procedures to:
- (i) compare the outcomes from different property professionals,
 - (ii) track the performance of same professional over time, and
 - (iii) compare progress against key AMP objectives against other LEAs
- are seen as key factors to be developed and implemented within the timescale of this document.
- 6.8 All significant projects will undergo option appraisal at the outset, and be monitored against time, cost, and quality benchmarks.

7. SCHOOL CAPITAL PROGRAMME AND FUNDING SOURCES

- 7.1 A summary of how strategic priorities translate into works programme is given in Annex A. The connections between different stakeholders and funding streams is illustrated in Annex B. Non-governmental funding such as PFI and private sponsorship are identified as key components. PFI primarily in respect of major capital investment at a number of sites in a package to address a range of priorities in one contract. Private sponsorship in relation to secondary school college status bids, and the collegiate academy approach.
- 7.2 Annex C gives an overview of out-turn figures in relation to education asset Management in 2001/2 and indicative figures for the following five years. Annex D identifies capital projects over £250,000, which it is hoped to fund during 2003/4.

8. LEARNING LESSONS

8.1 The improvement targets included in this statement reflect the current position. Proposed spending plans outlined in Annex C will obviously be amended over time to reflect:

- (i) budget confirmation (DfES, BCC, other funding)
- (ii) revised priority (due to shifts in local, national policy)
- (iii) updated information (revisions to condition suitability and sufficiency data)

8.2 The experience of implementing the country's first grouped school PFI new build project will help ensure smooth implementation of our second package and has also emphasised the importance of partnering to achieve best value and the concept of 'lifetime' or 'whole-life' costing.

8.3 Ultimately, outcomes will be achieved through partnership, putting together expertise, experience and funding from school, Education Service and other stakeholders.

GLOSSARY OF TERMS

ACG	Annual Capital Guideline
AMP	Asset Management Plan
BASS	Birmingham Advisory Support Service
BCC	Birmingham City Council
BIP	Behavioural Improvement Plan
CAD	Computer Assisted Design
CENTREX	Central Telephone Exchange
DDA	Disability Discrimination Act
DfES	Department for Education and Skills
DTLR	Department for Transport and the Local Regions
GCSE	General Certificate in Secondary Education
KPI	Key Performance Indicator
KS	Key Stage
LESS	Local Education Standards Strategy
LIFT	NHS Local Improvement Finance Trust
LPS	Local Policy Statement
M4i	Movement for Innovation
MIG	Managing Intervention Group
NGfL	National Grid for Learning
NDS	New Deal for Schools
PFI	Private Finance Initiative
PPP	Public Private Partnership
PSA	Public Service Agreement
PWG	Property Working Group
RAT	Rationalisation of School Places Working Group
SCP	Single Capital Pot
SEN	Special Educational Need
SOP	School Organisation Plan
TCF	Targeted Capital Fund