

**LA MARE DE CARTERET SCHOOLS
PROJECT**

INDEPENDENT REVIEW

FINAL REPORT
February 2015

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1 Introduction

- 1.1 This report is a summary of the findings from the Independent Review Panel commissioned by the Treasury and Resources (T&R) Department to make recommendations as to the most appropriate scale, scope and specification for the La Mare de Carteret (LMDC) schools project, in light of the Education Department's proposals for the redevelopment of the site and the need to demonstrate best value for the States overall.

2 Terms of Reference

- 2.1 Specifically, the review is to address:

- 2.1.1 Scope and scale of the proposed schools and additional facilities

- Pupil capacity requirements
- Resultant size of the schools
- The need for additional facilities within the Guernsey context

- 2.1.2 Specification

- Space guidelines appropriate for classrooms and other school areas for the delivery of the Guernsey curriculum
- Life span and the proposed build specifications for the project considering the whole life cost in the context of seeking overall best value

- 2.1.3 General

- Any other issues considered by the panel to be relevant to ensuring best value for the project

- 2.2 The full Terms of Reference for the review are included at Appendix 1.

3 The Independent Review Panel

- 3.1 The Review Panel comprised the following:

Dr Chris Nicholls CBE (Chair) - Educationalist

Sue Archer - Gleeds Advisory Ltd, chartered surveyor specialising in education construction

Liz Fraser - Architect specialising in education design

Andy Mahon - BDO LLP, management consultant and accountant specialising in public sector procurement of schools and other major capital projects

4 Approach

- 4.1 The Review Panel was first convened on 10 December 2014 when they met the Education Minister and the Treasury and Resources (T & R) Minister amongst others. The Panel subsequently had meetings with a wide range of stakeholders over the course of five days on site in Guernsey (7-9 January and 14-15 January) and reviewed a substantial library of documentation provided by T&R and Education officials. A list of the meetings we have had and the key documentation which we have received and reviewed is included at Appendices 2 and 3.

- 4.2 We would like to thank all that met with us and shared their views on the review. We are very grateful for their time given so willingly to us.
- 4.3 We recognise that there are a significant number of States policy decisions which have guided and shaped the proposed scope and scale of the project, including the Education Development Plan which dates back to 2002. Whilst we have sought to understand these policies, our review has focused on the needs of the project as they are today. If we believe that an existing policy would benefit from challenge and potential review, then we have raised the matter in our report.

5 Scope and Scale

- 5.1 Alongside ensuring strategic fit with current States policies, key business drivers for the need to re-build the LMDC primary and secondary schools are stated as:

- Condition of the schools
- Basic need (pupil places)

- 5.2 We have visited both schools and concur with the view that the condition of the school buildings is such that they are no longer suitable and that this needs to be addressed in some way.

Primary School

- 5.3 The business case for the primary school is for a two form entry (2FE) school for up to 420 pupils. However, the LMDC primary school is currently designated a Social Priority School, for which it is current States' Education Department policy to have maximum average class sizes of 25, rather than the usual 28. This means that, with the 14 classrooms proposed in the design, unless this policy changes, the maximum number of pupils in the school would actually be 350. This compares to a current roll of circa 281.
- 5.4 Providing a 2FE school will result in some spare capacity, even at forecast population peaks. We recognise, however, that any further work on primary school rationalisation may result in an increase in pupil numbers at LMDC. Also, a primary school at the LMDC site is an important community facility. A one form entry (1FE) school for 281 pupils would not be sufficient to meet current demand, as well as being unsatisfactory from an educational perspective. The Education Department's 'Transforming Primary Education, 2013' proposes 'moving to a policy of having 2 FE primary schools as far as possible to improve educational outcomes, increase efficiency and ensure greater consistency in performance'. We support, therefore, the proposals for a 2FE primary school at LMDC.

Secondary School

- 5.5 Population data and pupil place planning:

The current (January 2015) position in terms of places available and current capacity at Guernsey secondary schools is shown below.

| | Places available | Current pupils on roll | Excess capacity |
|---------------------------------|------------------|------------------------|-----------------|
| Colleges (private sector) 11-16 | 1000 | 867 | 133 |
| Grammar school (11-16) | 600 | 461 | 139 |
| St Sampson's | 720 | 698 | 22 |
| Les Beaucamps | 660 | 513 | 147 |
| La Mare de Carteret | 600 | 439 | 161 |
| Total | 3,580 | 2,978 | 602 |

5.6 The headline numbers above show significant excess capacity and bring into question the need for further build. We comment on this in detail later in the report.

5.7 The numbers on roll do show that Guernsey is operating small schools - only St Sampson's could be regarded as "medium" in size. We understand that this is a consequence of States' policy, and recognize the impact of geography and the overall size of the Guernsey community, but our view is that this may mean that the current system does not offer best value. There are no benefits of economies of scale, and it can be difficult to deliver the best educational opportunity, as a rich and varied curriculum becomes expensive (on a per pupil basis) to provide in small schools. In particular we highlight:

- Having four schools (including the Grammar) with a current total roll of 2,111 11-16 students (January 2015) means that the delivery of the Guernsey curriculum comes at a significant cost. We understand that Education policy is to have a teacher: pupil ratio of 1:15. From the information we have been given on current pupil numbers the teacher: pupil ratios at the three high schools are 1:11.3, 1:12.5, and 1:12.7. Whilst the Grammar School is a 'small' school in terms of 11-16 numbers on roll, it benefits from having the post-16 provision and the ability to share teaching resource across the two groups.
- The combination of running schools with excess capacity, combined with a building specification of BB98 plus 16% and the policy of maximum average class sizes of no more than 24 (whilst BB98 is based on class sizes of 30), means that space in the schools is likely to be under-utilised.

5.8 The Education Department's business case for the secondary school is for a five form entry (5FE) school for up to 600 pupils (based on a maximum average class size, as per Education policy, of 24 students). The business case bases this need on a pupil forecast model which shows a peak demand for secondary school places at the three State high schools (LMDC, Les Beaucamps and St Sampson's) plus the Grammar School of 2,471 places in 2026. [The business case added a 5% 'safety net' with which the potential number of students would peak at 2,594.] These figures compare with a

capacity of 2,580 places, assuming the rebuild of 600 places at LMDC. In the years leading up to, and then after that peak, there would be spare capacity in the system over the projected life span of the buildings.

- 5.9 During the course of this review, however, we have received two new sets of pupil forecasts:
- An updated version of the OBC model from the Education Department, updated to reflect current actual student numbers, 2014 Government Actuaries Department (GAD) forecasts and with some minor amendments to assumptions on movement to the independent sector.
 - An independent report commissioned by T&R and produced by Dorey Financial Modelling ('Guernsey School Population Risks').
- 5.10 Both forecasts are based on current student numbers and latest GAD data. However, they differ in terms of other assumptions made, most notably the likely levels of net inward migration. The forecast numbers therefore do differ. However, what is consistent is that:
- The shape of the 'curve' shows a rise in numbers to a peak in 2026/2027, followed by decline.
 - Even at peak numbers, the anticipated total number of students at the four schools is likely to be significantly lower than that forecast in the Outline Business Case (OBC) model and comfortably below the total maximum capacity if a 600 place school at LMDC is built as proposed. (Education's model shows a peak of 2,371 students against that capacity of 2,580 places). Beyond the peak, numbers decline steadily to a figure of 2,182 in 2042. Under Dorey's projections the expected decline is steeper, to a likely figure below 2,100 in 2040.
- 5.11 We appreciate that it may be prudent to retain some level of flexibility within the system (whilst recognising that it comes at a cost). On current forecasts, at peak, this would potentially be around 8%, but would then rise steadily to somewhere between 15% and 20% by 2040. Decisions on overall capacity requirements should also, however, consider factors which lie outside of those taken into account in the base forecasts referred to above, most notably:
- potential changes in States policy on selection. If selection is no longer applied, typical spare capacity in the Grammar School, created by capping the number of students selected each year, could be more readily filled.
 - potential policies to stimulate inward migration.
 - potential changes in the independent sector. Given the high proportion of students in the independent sector (just below 30%) any significant change in that sector could also have a significant impact on the number of places needed in the State sector.
- 5.12 It is recognised in the Dorey report that such factors could create a level of volatility in the population forecasts. Given this and given the differing versions of student number forecasts which have been produced for this review we strongly recommend that the States agrees a base population forecast model which will be used as the basis for future decisions, including decisions as a result of this review, on school provision.

- 5.13 In terms of planning for pupil capacity needs with any confidence it would have been beneficial for the States to have made a clear decision on the long term future of the selection policy and the Grammar School. Without such clarity, in considering the value for money of creating excess capacity in the system by providing 600 places at LMDC, the States will need to consider carefully the likely long term requirements for such capacity.
- 5.14 Whilst recognising that it may be prudent to retain a level of flexibility in terms of overall capacity, we do not believe, on the evidence of the current population forecasts, that there is an absolutely clear case for creating a total capacity of 2,580 secondary places, which a rebuild of 600 places at LMDC would create. Even at peak demand, it would create 200 to 300 (depending on the version of population forecasts used) 'spare' places within the total State system and beyond that, significantly more. This excess capacity in terms of places is exacerbated by decisions made in terms of the total space available in the new schools at Les Beaucamps and St Sampson's and proposed school at LMDC, which we comment on later in the 'Specification' section.

Options which could be considered

- 5.15 There are a range of possible courses of action, all of which come with some associated risk and / or broader implications for States policy and States services. In considering them, we believe it is critical that the States does so in full understanding of the implications of each, and not just in cost terms. It is also critical that they are considered in the context of the current position in respect of education provision within the Bailiwick, which reflects the policy choices which have been made in previous years. In particular, under the current selection policy, it is unlikely that all of the places at the Grammar school will ever be filled (as the intake is 'capped' at the top 25% of students).

Option One:

- 5.16 A radical proposal would be to close LMDC High School.
- 5.17 This would maximise use of the existing asset base, and educationally, would provide larger school rolls and with them the ability to deliver the Guernsey curriculum more efficiently and effectively. There is however insufficient capacity (308 places, including the Grammar School) to house current numbers (439) and the problem would be exacerbated by the projected increase in school population. We understand that there is room to build 240 additional places at St Sampson's which would answer current need, but probably not future demand. The extent of the places shortfall might not be unmanageable however and would only apply in the peak years.
- 5.18 Having said this, such an approach would severely limit any future flexibility in capacity. We are of the opinion that there is no real opportunity to expand Les Beaucamps and we consider that further expansion at St Sampson's to deal with the volatility that might be caused by future policy shifts (eg on selection or migration) would also be problematic. Full occupation of the Grammar school would already require such policy change.
- 5.19 Most importantly, we note the huge negative impact on the local community, if no secondary school were built. It would also mean that the sports facilities which are proposed, and which will also benefit the wider community, are unlikely to be delivered on this site. We do not recommend this option.

Option two:

- 5.20 A second option would be to construct a smaller High school at LMDC (for example a 4FE 480 place school or a 3FE 360 place school).
- 5.21 This approach would help manage overall capacity in the system whilst also ensuring the local community has access to not only a high quality school building, but also to the sport and community facilities planned for the site.
- 5.22 Our view, however, is that a secondary school of this size, standing alone (although within the Federation as it is currently envisaged) would not be viable educationally and specifically in terms of delivering the Guernsey curriculum. This is also, we understand, the view of the Education Department.
- 5.23 Such a model might be more feasible were the Federation to become more integrated, for example, so that LMDC was less 'stand-alone' and, at least, sharing staff and management with other schools. The school could be designed as an all through school for pupils ages 5-16 to address some of the educational issues of such a small secondary school.
- 5.24 While this is another option the States could consider, we question the wisdom of building a secondary school for fewer than 600 pupils and so we do not recommend this option.

Option three:

- 5.25 A final option would be to rebuild LMDC, as planned, as a 600 capacity school.
- 5.26 Building as currently proposed would allow the wider social and community objectives of the project to be realised (subject to our comments elsewhere in this report on the justification, scope and scale for these proposed additional facilities). However, as highlighted above, providing a 600 place school does create some surplus capacity in the system both now and in the longer term. It does, however, ensure there is long term flexibility to cope with changes in policies on selection and migration and the LMDC site also offers an opportunity in the longer term to increase the size of the school, should changes in policies result in the need for additional capacity. It should be designed therefore with the capacity to do this.
- 5.27 We re-iterate the importance of the outcome of the debate on the future of selection to the model of education provision. However, the population forecasts indicate that school rolls will be such that, even with management of catchment areas and retention of selection, average numbers on roll will be 'small' (circa or just below 600 students). For the reasons we comment on earlier in the report, regarding the challenges of running a model of small schools, from both an educational and cost perspective, we would strongly recommend that the States consider the potential benefits, in the longer term, of moving from a four school model to a three school one, something which the flexibility offered by the LMDC project would help to facilitate. We recognise that such a move would require very careful consideration by the States, not least of the variables around student numbers which we comment on in the report. If it were approved, there are then many factors which would influence when, and in particular how, such a move may be best implemented, not least the need for any move to be managed sensitively and in a way which does not impact on educational outcomes during transition. Given the need for this to be properly and

carefully considered, we take no view, therefore, as to how or when it could or should be achieved.

- 5.28 We are also aware of plans for significant capital expenditure on the future model for the Further Education (FE) College and, linked to the recommendation above, would pose the question as to whether there is an opportunity for the FE requirements to be met, in whole or in part, through the school accommodation portfolio, thus potentially saving significant amounts of future capital expenditure.
- 5.29 The rebuild of LMDC as a 600 capacity school, with the potential to expand in the medium to long term, therefore, is our recommended option with the proviso that the States should consider the longer term opportunities for rationalising educational provision and maximising the use of the full education estate.
- 5.30 Proceeding with this option without significant future increase in school population or rationalisation of current provision would, in our view, perpetuate uneconomic provision.

Summary:

- The LMDC primary school should be rebuilt as a 2 Form Entry primary school.
- Given the differing versions of student number forecasts which have been produced for this review we recommend that the States agrees a base population forecast model which will be used as the basis for future decisions, including decisions as a result of this review, on school provision.
- The current model of delivering secondary education with four small schools and surplus spaces in the system is expensive in both staffing and building running costs. It is harder and more expensive to deliver a broad and dynamic curriculum in smaller schools.
- We question the wisdom of building a secondary school for less than 600 pupils and do not recommend this option although it would reduce the number of surplus spaces in the system. The LMDC site probably provides the best flexibility to meet future changes.
- Our preferred option is to provide a 600 place secondary school at the LMDC site and for the States to consider the opportunities for optimising the use of its estate and rationalising educational provision, including Further Education, taking into account the optimal size, number and location of schools required to deliver a broad and balanced curriculum.

Additional facilities at LMDC

- 5.31 The LMDC project as defined includes four additional facilities which are linked to the primary and secondary school development. These are:
- A replacement co-provisioned nursery for up to 32 children (16 FTE) adjacent to and linked to the primary school. This is designed to be privately run and managed.

- Relocated Communication and Autism Support Service facilities for up to 18 Primary and 18 Secondary children, linked to both the Primary and Secondary schools by a covered way.
- Enhanced sports facilities to provide club level competition facilities for netball, volleyball and basketball, enabling regional competition as well as club level and community sport.
- Community facilities for families and the elderly.

5.32 We consider each of these proposals in turn below:

Nursery provision

5.33 Given the level of social deprivation in the immediate locality (which emphasises the need for early intervention) and the contraction of supply in the area (the closure of two local nurseries), we strongly support the provision of the nursery at LMDC particularly in the light of the proposed policy of all pupils in the year prior to reception being offered 15 hours per week of funded early education from September 2016.

5.34 In light of this new policy, we have some reservations as to whether the proposed nursery provision at LMDC will be sufficiently large (in terms of capacity) to meet demand for places for all pupils in the year prior to reception, and may indeed significantly impact on the availability of spaces for younger children. We would suggest some further modelling of likely capacity requirements is undertaken before the scale of the development is confirmed. The offer of wraparound childcare provision may also be considered at the nursery to support the local community back into education and work. This could also impact on the scope, scale and location of the proposed nursery as we believe there may be considerable advantages in it being adjacent to the Primary School reception class whilst maintaining its independence.

Communication and Autism support services

5.35 We have visited the existing primary autism facility at Amherst. We agree that this facility, whilst providing an excellent service, is in sub-standard and unsuitable accommodation and should be replaced. Although it could, in principle, be located at one of a number of primary school sites, there are distinct economies of scale from building it alongside the new LMDC primary school.

5.36 The current secondary facility at St Sampson's is in relatively good quality accommodation. There are, however, educational, service delivery and management advantages benefits in having primary and secondary provision co-located, and, subject to the secondary school development going ahead, we would recommend that this plan is followed.

5.37 Given the overall school age population, the proposed capacity of up to 36 (18 Primary and 18 Secondary) students in total would seem appropriate. Co-locating the primary and secondary units allows for flexibility in the number of pupils at each stage within the overall total capacity.

Enhanced sports facilities

5.38 As part of this review we have met with representatives from the Culture and Leisure department, the Sports Commission and the Netball Association, and the case as presented orally in that meeting is a more persuasive one than that set out in the

project documentation. We were particularly impressed with their aspiration for 'centres of excellence' for netball, basketball and volleyball.

- 5.39 The scale of the facility proposed - essentially to include a competition level sports hall and supporting changing and spectator facilities will enable them to compete in regional level competition and, ultimately, achieve levels of success and participation that other sports on the island have been able to achieve through competing effectively at that level. The island's basketball team, for example, is unable to play fixtures at home and has to travel to Southampton to play home fixtures. Netball uses the court at Beau Sejour, but, when used, takes out the whole sports hall for up to three days, meaning significant levels of lost income from community use and a high cost to the Netball Association. Court markings are also confusing for players and, when temporary spectator seating is used, run-off areas are unsatisfactory.
- 5.40 There will almost certainly be a net ongoing cost to developing these additional facilities, as the income from the (relatively) infrequent use for major / regional competition will be unlikely to cover the additional capital and running costs (as borne out by the OBC projections). We are surprised, therefore, that this is coming forward as a proposal from the Education Department, rather than as a costed option appraisal and business case from the Culture and Leisure Department and the Sports Commission (an appraisal which would have included, for example options such as extending existing facilities at Beau Sejour, if only to evidence why those options may be less deliverable and poorer value than building at LMDC). We are aware that these two parties have been in close dialogue with Education throughout, but, from outside, it seems odd that this is an Education led project. As such, we would class these facilities as 'highly desirable' rather than 'essential'.
- 5.41 For the aims and aspirations of the Culture and Leisure Department and the Sports Commission to be met there will need to be a proper management plan for the facility, recognising that it will be an island facility and community resource, rather than a school sports hall that is rented out of hours.

Community facilities

- 5.42 The proposal is for a small suite of rooms to be used both during and outside school hours, for community use by families and the elderly.
- 5.43 In the OBC the suggestion is that this may allow the Kindred Centre on the Les Genats estate to transfer to these rooms and thus release two houses back into the social housing pool. Our understanding, however, is that this is not now likely, and these facilities will be additional to the existing Kindred Centre.
- 5.44 The need for additional community facilities is supported by a range of indices and data indicating levels of deprivation, for example the high number of pupils on the child protection register, children in receipt of school uniform bursaries and numbers in social housing.
- 5.45 High quality community facilities do make the local population feel valued, and have been proven through international research to have a positive impact on outcomes for children, as well as contributing to wider regeneration of deprived areas. We understand that provision of community facilities (as long as they have a clear purpose and function) is supported by States' Health and Social Services (HSSD).
- 5.46 We would, therefore, support the provision of community facilities within the proposed project. We do, however, have some concerns regarding the scope and

specification of the facilities, especially as they are not now intended to replace the Kindred Centre. From our discussions the proposed use of the facilities and how they will relate to other current and future community provision remains unclear.

Summary:

- *Nursery.* We fully support the provision of the nursery at LMDC but strongly recommend a review of the capacity of the nursery, particularly in the light of the new policy of provision for all pupils in the year before reception.
- *Communication and Autism Unit.* We fully support the replacement of the current poor accommodation for Primary pupils at Amherst. We fully concur with the educational, service and management benefits of co-locating the primary and secondary units with the High School and Primary School at the LMDC site.
- *Enhanced sports facilities.* While the enhanced sports facilities appear to be highly desirable in providing competition level facilities for the three key sports of netball, basketball and volleyball, the provision of such facilities on this site should be supported by an options appraisal and business case from the Culture and Leisure Department. Furthermore if it is to successfully function as an island wide facility as well as local community resource, as opposed to a school sports hall that is rented out of hours, there will need to be a clear management plan and funding for its operation.
- *Community facilities.* While the need for additional community facilities is supported by a range of indices and data indicating levels of deprivation, further work needs to be done in conjunction with stakeholders to determine the scope and purpose of these facilities taking into account current and planned community provision, and how they are to be managed.

6 Specification

This part of the review considers the area standards and design of the Primary School and High school to support the delivery of the Guernsey curriculum as well as the other additional facilities on site.

Primary school

- 6.1 The primary school has been designed to an area specification of the UK Building Bulletin (BB) 99 plus a 'Guernsey factor' of 16%.
- 6.2 This 16% enhancement comes from the findings of the Review of Secondary School standards undertaken in 2005 which, when introduced, was not intended to be applied to primary schools. As far as we are aware, this Guernsey bonus has never been specifically tested for its appropriateness in a primary context. The overall gross area of the proposed Primary School is, therefore, some 350 sq m larger than that which we would normally expect to see for a primary school of this capacity, (420 pupils).
- 6.3 BB99 area standards for the size of individual classrooms are based on an average class size of 30. The Guernsey policy of the lower maximum average class sizes of 25

for LMDC, which we support from an educational perspective, means that classroom space is generous. The area premium has been used to provide additional rooms and spaces. The design concept and layout closely mirror what is present in the existing school and the review team was extremely impressed with the way in which the available space in the school is used and the vibrancy of the environment created by the teaching staff. Having said this, reducing space to, or closer to, the standard BB99 levels would not, in our opinion, impact on the quality of the children's experience or educational outcomes.

- 6.4 We do understand that the gross area per pupil at the new school will, with the 16% bonus, be at the mid-point in terms of comparative areas of the other primary schools, and well below that provided at the most recently built school at Forest Primary. Forest Primary school provides the highest gross area per pupil at 9.3 sq m/pupil, a considerable premium over the next largest school at 7.9 sq m per pupil. La Houquette Primary is the lowest at 5.1 sq m, and LMDC is designed to 6.1 sq m/pupil.
- 6.5 These factors, together with the likely (relatively) marginal impact on the net capital cost of reducing the total area of the primary school at this stage, makes us minded to recommend that the total space specification is confirmed at BB99 plus 16% if reviewing it at this point would delay the overall LMDC project. If, however, the decision following this review is that there will be delay, the necessity for the 16% bonus should be formally reviewed to ensure it can be justified in terms of educational outcomes. In any event, neither the 16% bonus nor the gross areas per pupil at the other primary schools should be used to set a precedent for any future primary school projects without there having been a thorough review to establish the appropriate area standards required to deliver the Guernsey primary curriculum effectively.

Secondary school

- 6.6 The area standard for the secondary school has been set on the basis of the area formula approved on the Les Beaucamps and St Sampson's projects, which is BB98 plus a Guernsey factor of 16%. This was recommended by an independent review panel of the St Sampson's proposals in 2005. We are surprised that, as both of those schools are now operational, there has been no post-project evaluation to assess whether the additional capital and running costs of the 16% extra space has been justified in terms of the educational outcomes achieved, before making the decision to provide the same specification for the LMDC project.
- 6.7 We understand, and support, the underlying principle behind the LMDC proposals, which is that of 'equality of educational opportunity'. We are concerned, though, that in terms of the LMDC project 'equality' has been interpreted as 'same as' in terms of the buildings to be provided. Furthermore we understand the total target briefed area for the High School, community facilities, sports facilities and autism unit was derived from taking the area of Les Beaucamps including the swimming pool and sports facilities, and allocating areas to the various elements at LMDC to add up to this total. Thus it appears to us that decisions on the brief, area standards and the design have been influenced by an initial decision on what the total area of the project should be rather than a 'bottom up' design based on need and reflective of the operational experience at the other two schools.
- 6.8 The effect of adopting this top down 'same as' approach has been, in our view:

- The LMDC High school target brief, (for 600 pupils) omitting sports facilities is 6,547 sq m which is broadly the same as at Les Beaucamps (6,590sqm omitting sports and swimming pool). As Les Beaucamps was designed to cater for 660 students, compared to the 600 at LMDC, even allowing for some error at the margins in terms of our interpretation of the building plans, the area allowed for classrooms and other facilities excluding sport, is in excess of the area of a 600 place school designed to BB98 plus 16%. Precise comparisons are difficult, but our own calculations suggest that the enhancement may be as much as 27%.
- By making the sports building, including the community facilities, plus the communication and autism facilities match the total area of Les Beaucamps sports facilities, there is a risk that the outcomes desired from those additional facilities will be compromised through design constraints which make the proposals sub-optimal. We have doubts about the sports facility having been designed with appropriate additional support facilities such as reception, storage, toilets and catering for matches. We are concerned that the function and purpose of the community facilities are unclear and indeed may not fully support the HSSD requirements or be in the most appropriate place on the site, and we feel some of the rooms in the autism unit are rather small.
- As mentioned above, BB98 standards are based on class sizes of 30 students for general subjects. Guernsey policy is for class sizes of a maximum average of 24 students for all subjects, which from an educational perspective we strongly support. It does mean, however, that, even before the 16% enhancement, space allocations are generous. With the proposed space allocation being in excess of the 16% uplift there is a likelihood that not only will it be an expensive school to run and maintain for the number of pupils, but that the school may struggle to create and maintain a vibrancy and 'buzz' that helps make a school an enjoyable place to be for both students and staff. Large, empty classrooms and small groups of pupils being taught in classrooms which could comfortably accommodate 30 pupils can be disadvantageous.

The Nursery

- 6.9 The Nursery has been designed to be 'stand-alone' although co-located with the primary school and with a link into the school.
- 6.10 In our view there can be considerable advantages in having the nursery and reception classes next to each other to support collaborative working and sharing of facilities, whilst maintaining the nursery as a stand-alone unit. This was a view shared by some of those with whom we spoke. For the nursery to be successfully located adjacent to the reception classes the design would need to ensure that the security of reception class and other pupils is not compromised by comings and goings during the school day and that teaching and learning is not compromised by disturbance. However this is a design issue which has been successfully resolved in a number of schools.

The Communication and Autism Unit

- 6.11 Some additional facilities to those in the proposed design might well be considered to ensure the accommodation fully meets the stated aim of providing improved facilities to enable better therapeutic and learning outcomes for pupils and support for their families as well as improving the efficiency and effectiveness for the operation of the service. The size of some of the proposed rooms appears rather small and the design

may not be sufficiently flexible to support varied demand for primary and secondary places within the overall total capacity.

Community Facilities

- 6.12 Depending on the way HSSD envisage these facilities being used and by whom, it might be useful to ensure that the current proposed location remains the optimal location, or whether there could be some advantages in the community facilities being co-located with the Primary School and Nursery.

Summary:

- The scheme for the Primary school at LMDC should go ahead as designed (BB99 plus 16% bonus) if reviewing it at this point would delay the overall LMDC project. If, however, the decision following this review is that there will be delay, the necessity for the 16% bonus should be formally reviewed to ensure it can be justified in terms of educational outcomes.
- The impact of the 16% uplift on the design and area of St Sampson's and Les Beaucamps High Schools should be reviewed and evaluated to determine whether this improves educational outcomes or is required to successfully deliver a broad, balanced and modern curriculum before applying it to LMDC High School.
- We recommend a review of the proposed location of the nursery.
- We recommend a review of the design and layout of the Autism and Communication Unit to ensure it fully meets the service users' requirements.
- We recommend a review of the design and location of the community facilities following clarification from HSSD of their scope and purpose.
- The overall size of the LMDC development and the way the areas have been calculated should be reviewed. The current design appears over-sized for the High School but may be restricted elsewhere.

7 Life span and proposed build specification

- 7.1 We note that the proposal is for a building life of 60 years, and the build specification supports that proposal as well as taking the marine environment into account. We agree with the proposal that the school be built to a 60 year lifespan, assuming that the cost is affordable to the States. The whole life costs over 60 years will be significantly lower than those for a less well specified building with a shorter life which would need a major refurbishment or rebuild during that period. However we would also stress that an appropriate maintenance regime needs to be established to ensure the building remains in good condition throughout its life.

8 Other issues relevant to ensuring best value

Design

- 8.1 We have read with great interest the Education Department's Vision Paper 2013 'Today's Learners Tomorrow's World Vision' and the Generic Design Brief for LMDC

schools, April 2014, v6. We fully endorse and support their ambitions and vision. We do, however, wonder if the current design is sufficiently flexible or imaginative to meet their aims.

- 8.2 For example the Generic Design Brief calls for 'Flexible teaching space in adaptable suites of spaces so that different needs can be accommodated... and various types of space will be available to a team of teachers should they require.' As an example, we feel that a run of equally sized maths classrooms lined along one side of a corridor is unlikely to meet the challenges of a changing and modern curriculum, support 'personalised and engaging education' or provide a particularly flexible or adaptable suite of spaces.

Process

- 8.3 The need for an independent review of the LMDC project suggests that either the processes in place to approve such a project are in themselves flawed or that they have been incorrectly followed. The Review team has not had sufficient time to research and therefore comment on these matters (process review did not form a central part of the remit). The States may wish to consider however what could be done to avoid a similar situation arising in future.

Summary:

- The design of the High School in particular should be reviewed to ensure it is sufficiently flexible and innovative to support effective teaching, learning and a modern and relevant curriculum in line with the Education Department's Vision Statement and Generic Design Brief.

9 Conclusions and recommendations

- 9.1 Our detailed recommendations are contained within the text above but key findings are:

- A 600 place secondary school with the potential for expansion should be built subject to the comments above and in the context of consideration of the opportunities for rationalisation of educational provision and optimising the use of the educational estate.
- A 2FE primary school should be built subject to the comments above.
- Co-located autism and nursery provision should be built subject to the comments above.
- The need for community facilities should be further discussed with stakeholders to determine their use and location on site.
- Enhanced sports facilities are highly desirable, but an options appraisal and business case should be completed, a management plan agreed, and the design negotiated to reflect intended use.

- 9.2 We are aware that the view of the Project Team is that any delay will mean that opening the new school in September 2017 cannot be achieved and that September 2018 will be the earliest date that a new school could open, adding additional cost to the project as well as impacting on students. We do not wholly concur with that assessment. Whilst, clearly, there will be additional project costs, re-visiting the

proposals and design can be speedy, and there are many instances in the Review Team's experience where new schools have opened, successfully, during a school year. Getting it 'right' must be the over-riding objective.

Appendix 1: Terms of reference

La Mare De Carteret Schools Independent Review

Terms of Reference

Introduction

In July 2014, the States approved the Treasury and Resources Department's States Report entitled 'States Capital Investment Portfolio' (Billet d'État XVI), which set out the States agreed approach to the future development and review of capital investment projects.

The Treasury and Resources Department has responsibility for ensuring that projects deliver best value in respect of the required resources.

This paper sets out the terms of reference for the review of a major scheme within the portfolio - the Education Department's project for the redevelopment of the primary and secondary schools at La Mare de Carteret.

Background

The project has reached Outline Business Case stage and the Department has submitted a report for consideration and approval by the States of Deliberation to spend an estimated £65 million to provide, rebuild and redevelop the existing La Mare de Carteret Schools' site.

The project comprises of:

The Schools:

- the replacement of the High School facilities for up to 600 11-16 age pupils with scope for expansion for up to 960 pupils;
- the replacement of two-form entry Primary School facilities for up to 420 4- 11 age pupils; and

The additional facilities:

- a replacement co-provisioned pre-school Nursery of up to 130m² adjacent to the Primary School for approximately 30 children aged 3-4 on a part-time attendance basis, allowing for groups of up to 16 children at any one time;
- club level competition indoor Sports Hall facilities within the schools' new sports facilities, focused on completing the federated approach to the provision of shared resources for sport within the States secondary Education sector, the avoidance of unnecessary duplication and optimising efficient dual-use school/community provision for netball, basketball and volleyball, as advised by the Culture and Leisure Department and the Guernsey Sports Commission;
- the relocation of Communication and Autism Support Service facilities of up to 200m² placed between the two schools to provide a designated unit for up to 18 children in the Primary School and a designated unit for up to 18 children in the High School and to be the base for the provision of outreach services for Bailiwick school age children and for advice to pre-school providers;

- provision of community facilities for families and the older generation within the schools and sports buildings as a mix of a discrete access suite of rooms of 150m² as part of the Sports Building and through the sharing of school facilities;

On 26th of November 2014 an amendment proposed by Deputy A Brouard and Seconded by Deputy M Fallaize was approved by the States of deliberation which directed

- The Treasury and Resources Department, in consultation with the Education Department, to commission an independent review in order to determine the most appropriate scale, scope and specification for the Project.
- The Education Department to lay before the States by no later than 31st March 2015 recommendations to fulfil the decision of the States to approve in principle the Project, having regard to the conclusions of the independent review, and for the avoidance of doubt, the independent review will be appended to the States Report

Purpose of the review

To make recommendations as to the most appropriate scale, scope and specification for the Project in light of the Education Department's proposals for the redevelopment of the site and the need to demonstrate best value for the States overall. Specifically in relation to the following:

Scope and Scale of the proposed Schools and additional facilities

- Pupil capacity requirements
- Resultant sizes of the schools
- The need for the additional facilities within the Guernsey context.

Specification:

- Space guidelines appropriate for classrooms and other school areas for the delivery of the Guernsey Curriculum
- Life span and the proposed build specifications for the project considering the whole life cost in the context of seeking overall best value

General:

- Any other issues considered by the panel to be relevant to ensuring best value for the project

Timeframe

The reviewers will report back to the Treasury and Resources Department by 31 January 2015.

Relevant Documentation

LMDC Capital prioritisation bid
States Capital Investment Portfolio (SCIP) Reports
SCIP Guidance
Population projection data
Strategic review report
SOC and Project Assurance review (PAR) reports (Gateway and Value for Money)
OBC and Project Assurance review (PAR) reports (Gateway and Value for Money)
States Report and letter of comment

Political correspondence between the Education and a Treasury and Resources Departments
Education Expert Review of Guernsey Benchmark Area Standards for Secondary School June 2005

The Education Departments Generic Design Brief

The Education Board's Vision July 2013 "Today's Learners Tomorrow's World"

Education Department States Report "Transforming Primary Education" October 2013

Other Project Documentation

The reviewers will have access to detailed project documentation as required

Composition of the review team

It is anticipated that members of the review team will have competence and capability in the following functions:

- Education planning
- Schools design and build
- Investment appraisal

Appendix 2: Documentation received

La Mare De Carteret Schools Independent Review

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| Education Board | Minutes from Meeting with Education Dept. Board 15 th January 2015 |
| SEN Information | <ul style="list-style-type: none"> • Provision for Learners with Autism/Communication and Interaction Difficulties - PowerPoint Presentation • Review of Primary And Secondary Phase Provision For Pupils With Communication And Interaction Difficulties Including Autism - March 2013 • Amended Version One CAS Base Plan (Physical Copy to Liz Fraser) |
| Primary Performance Presentation | 2014 Primary Performance |
| Design Team Documentation | <ul style="list-style-type: none"> • LMDC Sports Correspondence • LMDC Plan • LMDC Issues Review - Pupil Capacity • LMDC Issues Review - Pupil Capacity 2 • LMDC Stage 3 (D) 1.0 Architecture • LMDC Stage 3 (D) 2.0 Landscape • LMDC Stage 3 (D) 3.0 Structures • LMDC Stage 3 (D) 4.0 Services • LMDC Stage 3 (D) 5.0 Fire • LMDC Stage 3 (D) 6.0 Acoustics • LMDC Stage 3 (D) 7.0 Transport |
| Options | <ul style="list-style-type: none"> • St Sampson's High Options Blocks - Year 10 • Grammar School Options Block (email) • Grammar School Options Brochure • Additions to the Y9 Options offer • Guernsey Grammar School and Sixth Form Centre 2014 - 2016 • Grammar School Options Form 2014 • LMDC Options Book 2014 • KS2 to GCSE Y11 Cohort Options Plans |
| Population | <ul style="list-style-type: none"> • Guernsey School Population Risks - Dorey Financial Modelling • Education Department Model and Presentation |
| Urban Regeneration | Meeting only |

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| VfM | Meeting only |
| Accommodation Schedules | <ul style="list-style-type: none"> • LMDC Area Schedule Summary 1320-8000 • LMDC Area Schedule Summary 1320-8001 • LMDC Area Schedule Summary 1320-8002 <p>Documents also sent in converted Excel Format</p> |
| Catchment Area Maps | <ul style="list-style-type: none"> • Primary School Catchment Map • High School Catchment Map <p>Plus links to interactive webpage</p> |
| LMDC Capital Prioritisation Bid | <ul style="list-style-type: none"> • LMDC Capital Prioritisation Bid • LMDC Capital Prioritisation Bid - Plan |
| SCIP Portfolio Report | States Report |
| SCIP Guidance Notes | <ul style="list-style-type: none"> • SCIP Guidance Note 001 - General Guidance • SCIP Guidance Note 003 - Review Panel • SCIP Guidance Note 005 - Project Assurance Review and VfM |
| Strategic Outline Case | LMDC - SOC |
| Gateway 1 Review Report | LMDC GW1 Review Report |
| Outline Business Case | LMDC - OBC |
| Project Assurance Review 2 | LMDC -PAR2 Report |
| La Mare De Carteret States Report | LMDC States Report |
| Political Correspondence | Political Correspondence between Education and T&R |
| Review of Guernsey Benchmark Area Standards | Education Expert Review of Guernsey Benchmark Area Standards |
| La Mare De Carteret Generic Design Brief | LMDC Generic Design Brief |
| Today's Learners Tomorrow's World | Education Department Vision - Today's Learners Tomorrows World |
| Transforming Primary Education States | Education Department States Report - |

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|---------------------------|---|
| Report | Transforming Primary Education |
| Curriculum | <ul style="list-style-type: none"> • Four Purposes of the Bailiwick of Guernsey Curriculum • Curriculum Framework KS3.090121 • Curriculum Framework KS4.090121 • Curriculum Framework KS5.090121 • Curriculum Frameworks FS,KS1,KS2.090121 |
| Staffing / School Numbers | <ul style="list-style-type: none"> • Secondary School Staffing • Secondary School Teachers • Grant Aided Colleges • Primary Registration Group Statistics • Primary School Population Statistics • Secondary School Population Statistics • Special School Population Statistics • Final Primary Allocation • Le G Schools (Le Genats Estate Pupil School Locations) |
| Exam Results | <ul style="list-style-type: none"> • Data Collation Summary 2014 Exam Day Version |
| Union Letter of Support | <ul style="list-style-type: none"> • Letter La Mare De Carteret |

Appendix 3: List of meetings and visits

La Mare De Carteret Schools Independent Review

| Meeting Subject | Meeting Attendees | Notes |
|---|--|---|
| La Mare De Carteret Primary and High Schools Tour | Diane Hand, LMDC Primary School Head teacher; Vicky Godley, LMDC High School Head teacher Alan Brown, Director of Education; Derek Neale, Head of EDP Schools Projects; Ashley Dupre, Planning Manager (Schools) | Panel Member Sue Archer not present on Initial Visit but a second tour was arranged with Liz Fraser also attending. |
| St Sampson's High School Tour | Annabel Bolt, St Sampson's High Head Teacher; Alan Brown, Director of Education; Derek Neale, Head of EDP Schools Projects; Ashley Dupre, Planning Manager (Schools) | Sue Archer not present. |
| Les Beaucamps High School Tour | Sophie Roughsedge, Les Beaucamps High School Head Teacher; Alan Brown, Director of Education; Derek Neale, Head of EDP Schools Projects; Ashley Dupre, Planning Manager (Schools) | Sue Archer not present. |
| Education Department Political Board | Deputy Robert Sillars (Minister); Deputy Andrew Le Lievre; Deputy Richard Conder; Deputy Christopher Green; Deputy Peter Sherbourne; Jon Buckland, Chief Officer Education Dept; Alan Brown, Director of Education | Sue Archer not present. |
| Value for Money / PAR 2 Review | Alex Wakefield, Director - Northgate's Ltd; Geraint Ap Siôn, Portfolio Director | Sue Archer not present. |
| Treasury & | Deputy Gavin St Pier (Minister); | Sue Archer not present. |

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| Resources Department Political Board | Deputy Tony Spruce; Deputy Roger Perrot; Deputy Hunter Adam (TBC); Mr John Hollis (Non-Voting Member); Geraint Ap Siôn, Portfolio Director | Deputy Jan Kuttelwascher unable to attend. |
| Population | Martyn Dorey, Director - Dorey Financial Modelling | Sue Archer not present. |
| SEN / Autism, Autism Unit - Amherst Primary School | Zoe Grainger, Director of Inclusion and Support Services; Graham Fisher, Head of Communication and Autism Support Service | Sue Archer not present. |
| Early Years | Alan Brown, Director of Education; Nick Hynes, Head of Standards and Learning Effectiveness; Caroline Blondel from the Guernsey Pre-School Learning Alliance | Sue Archer not present. |
| Curriculum | Alan Brown, Director of Education | Sue Archer not present. |
| Project Design Team | Derek Neale, Head of EDP Schools Projects; Ashley Dupre, Planning Manager (Schools); Alan Brown, Director of Education; Simon Peacock, Project Manager; David Gausden, Design Engine Architects; Ian Ingram (and possibly David Dickinson) from Gardiner and Theobald | Sue Archer not present. |
| Forest Primary School and Le Rondin School Tour | Alan Brown, Director of Education | Chris Nicholls and Sue Archer only panel members present. |
| Sports Facilities | Natasha Keys, Principal Officer, Culture & Leisure Dept; Graham Chester, Sports Development Manager, Guernsey Sports Commission; Keith Gallienne, Director of Leisure Services; | |

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| | Julie Wright, Guernsey Netball Association | |
| Population | Jon Buckland, Chief Officer, Education; Sarah Harvey, Strategy & Policy Officer; Alan Brown, Director of Education | |
| High School Area Calculation Methods | Derek Neale, Head of EDP Schools Projects; Ashley Dupre, Planning Manager (Schools) | Liz Fraser and Andy Mahon only panel members present. |
| Colleges | Mr Andrew Warren - Blanchelande College Principal; Mr George Hartley - Elizabeth College Principal; Mrs Ashley Clancy - Ladies College Principal | Chris Nicholls and Sue Archer only panel members present. |
| Inter-departmental working between Education/HSSD | Carol Tozer, Chief Officer of HSSD; Zoe Grainger, Director of Inclusion and Support Services at Education; Alan Brown, Director of Education | Andy Mahon not present. |
| Grammar School | Christine Watson, Head Teacher Grammar School & Sixth Form Centre | Chris Nicholls was the only panel member at this meeting. |
| Urban Regeneration | Damon Hackley, Strategic Planning Officer | Andy Mahon was the only panel member at this meeting. |
| Treasury & Resources | Bethan Haines, States Treasurer; Geraint Ap Siôn, Portfolio Director | |