

Cabinet Committee

Committee Room 2, Fife House, North Street, Glenrothes /
Blended Meeting



Thursday, 11 January 2024 - 10.00 am

AGENDA

Page Nos.

1. **APOLOGIES FOR ABSENCE**
2. **DECLARATIONS OF INTEREST** – In terms of Section 5 of the Code of Conduct, members of the Committee are asked to declare any interest in particular items on the agenda and the nature of the interest(s) at this stage.
3. **MINUTES**
 - (i) Cabinet Committee of 30 November 2023. 4 - 11
 - (ii) Minutes of Education Appointment Committee of 13, 17 and 27 November and 8 December 2023. 12 - 15
4. **REVENUE MONITORING 2023-24** – Report by the Executive Director (Finance and Corporate Services). 16 - 33
5. **CAPITAL INVESTMENT PLAN - MONITORING 2023-24** – Report by the Executive Director (Finance and Corporate Services). 34 - 45
6. **LOCAL TAXATION - REVISION TO CHARGING** – Joint report by the Head of Revenue and Commercial Services and Head of Customer and Online Services. 46 - 56
7. **CLIMATE FIFE 2024 - STRATEGY AND ACTION PLAN** – Report by the Head of Planning Services. 57 - 87
8. **APPOINTMENT OF CHIEF PLANNING OFFICER (CPO)** – Report by the Head of Human Resources. 88 - 90
9. **NATIONAL BUILDING STANDARDS HUB - HOSTING WITHIN FIFE COUNCIL** – Report by the Head of Protective Services. 91 - 103
10. **FIFE'S HOMELESSNESS STRATEGY 2024-27** – Report by the Head of Housing Services. 104 - 124
11. **REVIEW OF THE MOTHBALLING OF MILTON OF BALGONIE PRIMARY SCHOOL** – Report by the Head of Education and Children's Services. 125 - 210
12. **PEDESTRIAN AND CYCLIST ACCESS TO HOUSEHOLD WASTE RECYCLING CENTRES** - Joint report by the Head of Environment and Building Services and Service Manager, Fife Resource Solutions. 211 - 226

The/

The Committee is asked to resolve, under Section 50(a)(4) of the Local Government (Scotland) Act 1973, as amended, to exclude the public and press from the meeting for the following items of business on the grounds that they involved the likely disclosure of exempt information as defined in Part 1 of Schedule 7A of the Act (relevant paragraph numbers are detailed beside the heading to each item).

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13. FIFE INDUSTRIAL INNOVATION INVESTMENT PROGRAMME - EDINBURGH AND SOUTH EAST OF SCOTLAND CITY REGION DEAL - TRANCHE 3 BUSINESS CASE (PRIVATE REPORT) (paras. 8 and 9) – Report by the Head of Business and Employability Services.	227 - 310
14. FORTH GREEN FREEPORT - DELIVERY ARRANGEMENTS (PRIVATE REPORT) (para. 6) - Report by the Head of Business and Employability Services.	311 - 319

Members are reminded that should they have queries on the detail of a report they should, where possible, contact the report authors in advance of the meeting to seek clarification.

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Finance and Corporate Services
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4 January 2024

If telephoning, please ask for:

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BLENDED MEETING NOTICE

This is a formal meeting of the Committee and the required standards of behaviour and discussion are the same as in a face to face meeting. Unless otherwise agreed, Standing Orders will apply to the proceedings and the terms of the Councillors' Code of Conduct will apply in the normal way

For those members who have joined the meeting remotely, if they need to leave the meeting for any reason, they should use the Meeting Chat to advise of this. If a member loses their connection during the meeting, they should make every effort to rejoin the meeting but, if this is not possible, the Committee Officer will note their absence for the remainder of the meeting. If a member must leave the meeting due to a declaration of interest, they should remain out of the meeting until invited back in by the Committee Officer.

If a member wishes to ask a question, speak on any item or move a motion or amendment, they should indicate this by raising their hand at the appropriate time and will then be invited to speak. Those joining remotely should use the "Raise hand" function in Teams.

All decisions taken during this meeting, will be done so by means of a Roll Call vote.

Where items are for noting or where there has been no dissent or contrary view expressed during any debate, either verbally or by the member indicating they wish to speak, the Convener will assume the matter has been agreed.

There will be a short break in proceedings after approximately 90 minutes.

Members joining remotely are reminded to have cameras switched on during meetings and mute microphones when not speaking. During any breaks or adjournments please switch cameras off.

THE FIFE COUNCIL - CABINET COMMITTEE – BLENDED MEETING

Committee Room 2, Fife House, North Street, Glenrothes

30 November 2023

10.00 am – 3.05 pm

PRESENT: Councillors David Ross (Convener), Tom Adams (substituting for Cllr Judy Hamilton), David Alexander, Lesley Backhouse, David Barratt, John Beare, James Calder, Altany Craik, Colin Davidson (substituting for Cllr Cara Hilton), Graeme Downie, Linda Erskine, Derek Glen, Peter Gulline, Gary Holt, Kathleen Leslie (substituting for Cllr Dave Dempsey), Rosemary Liewald, Carol Lindsay, Jane Ann Liston (substituting for Cllr Fiona Corps), Jonny Tepp, Ross Vettrano, Craig Walker and Jan Wincott.

ATTENDING: Ken Gourlay, Chief Executive; Eileen Rowand, Executive Director (Finance and Corporate Services), Elaine Muir, Head of Finance, Sharon McKenzie, Head of Human Resources, Lindsay Thomson, Head of Legal and Democratic Services, Laura Robertson, Finance Operations Manager, Jacqui Cameron, Service Manager and Stevie Murray, HR Lead Officer, Human Resources and Michelle McDermott, Committee Officer, Legal and Democratic Services, Finance and Corporate Services; Lynn Gillies, Service Manager, Education and Children's Services; Pam Ewen, Head of Planning, Ross Spalding, Service Manager, Hamish Martin, Strategy Officer and Hugh Muschamp, Lead Officer, Planning Service; Michael Enston, Executive Director (Communities), John Mills, Head of Housing Services, Helen Wilkie, Service Manager and Mhairi Mullen, Service Manager, Housing Services, Paul Vaughan, Head of Communities and Neighbourhoods Service, Sheena Watson, Programme Manager and Zahida Ramzan, Policy Co-ordinator, Communities and Neighbourhoods Service; John Mitchell, Head of Roads and Transportation Services, Susan Keenlyside, Service Manager and Matthew Roberts, Lead Consultant, Roads and Transportation Services; Nigel Kerr, Head of Protective Services and Kenny Bisset, Lead Officer, Protective Services.

APOLOGIES FOR ABSENCE: Councillors Fiona Corps, Dave Dempsey, Judy Hamilton and Cara Hilton.

174. DECLARATIONS OF INTEREST

- Councillor Jonny Tepp declared an interest at para. 181 - Community Asset Transfer Application by Wormit Boating Club - as he had provided a letter of support to the application.
- Councillor Rosemary Liewald declared an interest at para. 186 – Pay Strategy and Job Evaluation – as she was a former employee of the Education Service.
- Councillor Linda Erskine declared, as a matter of transparency and with reference to para. 186 – Pay Strategy and Job Evaluation – that she had a connection by reason of her involvement with the previous Employment

Tribunal. However, Councillor Erskine, having applied the objective test, concluded that she had no interest to declare and therefore remained and participated in the discussion.

175. MINUTES

- (i) Minute of the Cabinet Committee of 2 November 2023.

Decision

The committee agreed to approve the minute.

- (ii) The following minute was submitted for noting:-

Appeals Sub-Committee of 6 November 2023.

Decision

The minute was noted.

176. LOCAL HEAT AND ENERGY EFFICIENCY STRATEGY

The committee considered a report by the Head of Planning Services seeking approval of the first Local Heat and Energy Efficiency Strategy and high level Delivery Plan as required under The Local Heat and Energy Efficiency Strategies (Scotland) Order 2022.

Decision

The committee:-

- (1) approved the Local Heat and Energy Efficiency Strategy (as set out in Appendix 1) and the high level Delivery Plan (Appendix 2); and
- (2) noted the detailed Delivery Plan would be reported to Cabinet by March 2025.

177. HOUSING REVENUE ACCOUNT (HRA) CONSULTATIVE BUDGET 2024/25

The committee considered a joint report by the Head of Housing Services and the Head of Finance to agree appropriate consultative rent options for 2024-25 to enable the council to carry out its statutory duty to formally consult with council tenants during December 2023 and January 2024. The outcome of the formal tenant consultation would be reported in the HRA budget report at full council in February 2024.

Motion

Councillor David Ross, seconded by Councillor Altany Craik, moved the recommendations contained within the report.

Amendment

Councillor Lesley Backhouse, seconded by Councillor David Alexander, moved that "2% and 4%" be inserted before "5%" within recommendation 3.

Roll Call Vote

For the Motion – 13 votes

Councillors Tom Adams, James Calder, Altany Craik, Colin Davidson, Graeme Downie, Linda Erskine, Peter Gulline, Gary Holt, Kathleen Leslie, Jane Ann Liston, David Ross, Jonny Tepp and Jan Wincott.

For the Amendment – 9 votes

Councillors David Alexander, Lesley Backhouse, David Barratt, John Beare, Derek Glen, Rosemary Liewald, Carol Lindsay, Ross Vettraino and Craig Walker.

Having received a majority of votes, the motion was accordingly carried.

Decision

The committee:-

- (1) noted the current HRA financial position, including the projected £8.055m shortfall for 2024-25 prior to a rental increase being applied;
- (2) noted the balance of uncommitted HRA reserves as £2.975m;
- (3) agreed to survey council tenants around options for a rent increase in 2024-25 of 5%, 6% and 7% to also apply to charges for services, garage sites, lockups and temporary accommodation;
- (4) noted that the outcome of the full tenant consultation would be reported to full council in February 2024; and
- (5) noted that the HRA Business Plan Review was continuing with results to be reported to council in February 2024.

178. STRATEGIC HOUSING INVESTMENT PLAN 2024-2029

The committee considered a report by the Head of Housing Services seeking authority for the submission of Fife's Strategic Housing Investment Plan (SHIP) 2024/25 - 2028/29 to the Scottish Government. The Plan was revised and updated annually for a rolling five year period.

Decision

The committee:-

- (1) agreed the Strategic Housing Investment Plan (SHIP) 2024/25 - 2028/29 based on the priorities and principles outlined in the report; and
- (2) authorised the Head of Housing Services, in consultation with the Spokesperson for Housing and Building Services, to amend or substitute projects within the SHIP as and when required and to also consult local elected members where projects within their wards were amended or substituted.

Councillor Ross Vettraino left the meeting during consideration of the above item.

The meeting adjourned at 11.30 am and reconvened at 11.50 am.

179. COST OF LIVING CRISIS - HOUSEHOLD SUPPORT

The committee considered a report by the Executive Director (Communities) recommending continued support for the "Big Hoose" project in the context of the council's wider approach to helping people access household items and furnishings.

Decision

The committee noted the evaluation of the "Big Hoose" project and agreed the continuation of the funding for the project for 2023/24.

180. CHANGE PLANNING AND ORGANISATION CHANGE

The committee considered a report by the Executive Director (Communities) setting out proposals for changes to organisational arrangements in line with the direction agreed by Cabinet in February and June 2023.

Decision

The committee:-

- (1) agreed the case for change for a "No Wrong door approach" to service development as set out in the Outline Business Case;
- (2) agreed to proceed with the next phase of work involving detailed service redesign and a blueprint for implementation;
- (3) agreed the reforms proposed to improve the work of Area Committees and Place based working; and
- (4) noted progress to align directorate service change plans with the overall direction of reform.

181. CHIEF OFFICER - RECRUITMENT - ORGANISATIONAL CHANGE

The committee considered a report by the Head of Human Resources providing an update on a number of areas of immediate implementation arising from the separate report on Change Planning and Organisational Change on the agenda. These changes dealt with recommendations to alter the role and remit of the post of Executive Director (Education and Children's Services), to relocate the post of Head of Service (Children and Families and Criminal Justice), including the role of Chief Social Work Officer (CSWO), to the Communities Directorate and to proceed with recruitment for both posts.

Decision

The committee:-

- (1) agreed the organisational changes in the senior leadership model in Education and Children's Services and Communities as set out in section 2 of the report; and

2023 CC 101

- (2) agreed the recruitment strategy for the post of Executive Director (Education) and the post of Head of Service (Children and Families and Criminal Justice) and Chief Social Work Officer.

182. **TEMPLEHALL COMMUNITY HUB - NEW BUILD PROJECT**

The committee considered a report by the Head of Communities and Neighbourhoods Service which provided an update on the progress of the new build Templehall Community Hub and integration of assets.

Decision

The committee:-

- (1) noted the council's agreed capital plan allocation of £15.3m to this project;
- (2) approved the integration of the existing Community Centre, Local Office, Argos Centre and library service (operated by Fife Cultural Trust) into the new hub; and
- (3) approved the project Business Case referenced in the report.

Having declared an interest in the following item, Councillor Jonny Tepp left the meeting at this stage.

183. **COMMUNITY ASSET TRANSFER APPLICATION BY WORMIT BOATING CLUB**

The committee considered a joint report by the Head of Property Services and Head of Communities and Neighbourhoods Service seeking approval for a Community Asset Transfer request received from Wormit Boating Club under Part 5 of the Community Empowerment (Scotland) Act 2015 to purchase land at Wormit pier and grounds.

Decision

The committee approved the asset transfer request at less than market value at the price of £13,000 and all otherwise on terms and conditions to the satisfaction of the Head of Property Services and the Head of Legal and Democratic Services.

Councillor Jonny Tepp rejoined the meeting following consideration of the above item.

184. **FIFE'S AIR QUALITY STRATEGY 2021-2025 - REVOCATION AT BONNYGATE, CUPAR AND APPIN CRESCENT, DUNFERMLINE AIR QUALITY MANAGEMENT AREAS**

The committee considered a report by the Head of Protective Services advising of the planned revocation of the Bonnygate, Cupar and Appin Crescent, Dunfermline Air Quality Management Area Orders.

Decision

The committee:-

- (1) noted the scientific evidence and proposed arrangements for the revocation of the Bonnygate, Cupar and Appin Crescent, Dunfermline Air Quality Management Areas (AQMA) including the enactment of associated formal Revocation Orders presented in the Appendices to the report;
- (2) agreed the Revocation of the Bonnygate, Cupar and Appin Crescent, Dunfermline Management Orders;
- (3) supported the provision of an elected members' briefing note to City of Dunfermline Area and North East Fife Area committee members summarising the revocation process of these two AQMA; and
- (4) noted that while progress had been made on PM10 monitoring in Bonnygate, Cupar and Appin Crescent, Dunfermline, since 2020 concentrations had increased on both sites and, in Appin Crescent during 2022, concentrations exceeded all years since 2016 and requested that officers maintained the same level of monitoring.

Councillor Jan Wincott left the meeting during consideration of the above item.

The meeting adjourned at 1.10 pm and reconvened at 1.30 pm.

185. LOCAL TRANSPORT STRATEGY FOR FIFE

The committee considered a report by the Head of Roads and Transportation Services seeking committee approval for the Local Transport Strategy for Fife 2023-2033.

Decision

The committee:-

- (1) approved the Local Transport Strategy for Fife 2023-2033, as detailed in Appendix 1, and delegated to the Head of Roads and Transportation Services to make any minor amendments prior to publication;
- (2) agreed that update reports on the delivery plan be presented to the Environment Transportation and Climate Change Scrutiny Committee as appropriate; and
- (3) recognising the content of the 2019 Transport Scotland Act, agreed that a report be brought back to a future meeting of the committee providing options for the council to begin the provision of not for profit bus services with a view to improving connectivity and reducing vehicular traffic. The report would include options for routes emanating from the council's park and ride sites to local population and commercial centres.

Councillor John Beare and Jane Ann Liston rejoined the meeting during consideration of the above item and Councillor Peter Gulline left the meeting during consideration of the above item.

186. TREASURY MANAGEMENT ANNUAL REPORT 2022-23 AND UPDATE 2023-24

The committee considered a report by the Executive Director (Finance and Corporate Services) which was prepared in accordance with the Chartered Institute of Public Finance and Accountancy (CIPFA) publication, Treasury Management in the Public Services - Code of Practice and Cross Sectorial Guidance Notes. The report provided an update against the Annual Treasury Policy and Investment Strategy for both the previous year and the current year to date.

Decision

The committee noted the contents of the report.

187. PAY AWARD AND REAL LIVING WAGE

The committee considered a report by the Head of Human Resources outlining the implementation of the 2023/24 SJC and Chief Officer Pay Award. The report also sought authority to implement the revised Real Living Wage.

Decision

The committee:-

- (1) noted that the 2023/24 SJC Pay Award may be implemented without a collective agreement following the decision of the COSLA Leaders meeting on 3 November 2023 to implement the pay offer with immediate effect and pending the outcome of the UNISON ballot; and
- (2) agreed to implement the revised Real Living Wage rate for all eligible employees in the December 2023 payroll to take effect from 13 November 2023.

Councillor Graeme Downie left the meeting during consideration of the above item.

The Committee resolved, under Section 50(A)(4) of the Local Government (Scotland) Act 1973, as amended, to exclude the public and press from the meeting for the following item of business on the grounds that it involved the likely disclosure of exempt information as defined in paras. 11 and 12 of Part 1 of Schedule 7A of the Act.

Having declared an interest in the following item, Councillor Rosemary Liewald left the meeting at this stage.

188. PAY STRATEGY AND JOB EVALUATION (PRIVATE REPORT)

The committee considered a report by the Head of Human Resources advising of two significant projects relating to the Pay Strategy and Job Evaluation, in particular work developing the mini-evaluation project agreed by the council's Cabinet Committee on 10 August 2023.

Decision

The committee agreed:-

- (1) the proposal and funding to implement Integrated Pay and Terms and Conditions of Service for Craft and Single Status employees by Summer 2024 (Pay Strategy Phase 1);
- (2) the need to review the Single Status pay structure by March 2023 (Pay Strategy Phase 2);
- (3) the review of Chief Officer Pay and Grading arrangements and noted the intention to explore the use of external consultants to support this project with an update provided at a future meeting (Pay Strategy Phase 2); and
- (4) resources and funding necessary to support the mini-evaluation project as approved by Cabinet Committee on 10 August 2023.

**THE FIFE COUNCIL – EDUCATION & CHILDREN'S SERVICES
COMMITTEE – EDUCATION APPOINTMENT COMMITTEE – GLENROTHES**

13 November 2023

09.00am-13.00pm

PRESENT: Councillors Linda Erskine and Eugene Clarke, Angela Logue, Head of Service, Mary McKay, Education Manager, Dianne Crichton, Chair, Parent Council, Kirsty Beswick, Parent Council.

29. EXCLUSION OF PUBLIC AND PRESS

Decision

The Committee resolved that under Section 50(A)(4) of the Local Government (Scotland) Act 1973, the public be excluded from the meeting for the following item of business on the grounds that it involved the likely disclosure of exempt information as defined in Paragraph 1 of Part 1 of Schedule 7A to the Act.

30

HEADTEACHER – LOCHGELLY WEST PRIMARY SCHOOL

The Committee interviewed 1 applicant on the short list for this post.

Decision

Agreed to recommend the appointment of the applicant.

**THE FIFE COUNCIL – CABINET COMMITTEE – EDUCATION
APPOINTMENT COMMITTEE – GLENROTHES**

17 November 2023

09.00 am – 12:00pm

PRESENT: Councillors Alycia Hayes and Alistair Suttie, Maria Lloyd, Head of Service, Karen Lees, Education Manager, Miriam Watts, Parent Council, Anna Campbell, Parent Council.

31. **EXCLUSION OF PUBLIC AND PRESS**

Decision

The Committee resolved that under Section 50(A)(4) of the Local Government (Scotland) Act 1973, the public be excluded from the meeting for the following item of business on the grounds that it involved the likely disclosure of exempt information as defined in Paragraph 1 of Part 1 of Schedule 7A to the Act.

32. **HEADTEACHER – QUEEN ANNE HIGH SCHOOL**

The Committee interviewed 2 applicants on the short list for this post.

Decision

Agreed to recommend the appointment of one of the applicants.

**THE FIFE COUNCIL – EDUCATION & CHILDREN'S SERVICES
COMMITTEE – EDUCATION APPOINTMENT COMMITTEE – GLENROTHES**

27 November 2023

11.00am-13.00pm

PRESENT: Councillors Dave Dempsey and Kathleen Leslie, Angela Logue, Head of Service, Jackie Funnell, Education Manager, Zoe Leslie, Chair, Parent Council, Alex Frame, Parent Council.

33. EXCLUSION OF PUBLIC AND PRESS

Decision

The Committee resolved that under Section 50(A)(4) of the Local Government (Scotland) Act 1973, the public be excluded from the meeting for the following item of business on the grounds that it involved the likely disclosure of exempt information as defined in Paragraph 1 of Part 1 of Schedule 7A to the Act.

34.

HEADTEACHER – CAPSHARD PRIMARY SCHOOL

The Committee interviewed 1 applicant on the short list for this post.

Decision

Agreed to recommend the appointment of the applicant.

**THE FIFE COUNCIL – CABINET COMMITTEE – EDUCATION
APPOINTMENT COMMITTEE – GLENROTHES**

8 December 2023

12.25pm – 01.30pm

PRESENT: Councillor Dave Dempsey, Angela Logue - Head of Service,
Jackie Funnell - Education Manager, and Mary Caldwell -
Catholic Church Representative.

35. EXCLUSION OF PUBLIC AND PRESS

Decision

The Committee resolved that under Section 50(A)(4) of the Local Government (Scotland) Act 1973, the public be excluded from the meeting for the following item of business on the grounds that it involved the likely disclosure of exempt information as defined in Paragraph 1 of Part 1 of Schedule 7A to the Act.

**36. HEADTEACHER – ST SERF’S AND HOLY NAME RC PRIMARY
SCHOOLS.**

The Committee interviewed 1 applicant on the short list for this post.

Decision

Agreed to recommend the appointment of the applicant.

11 January 2024
Agenda Item No. 4

Revenue Monitoring 2023-24

Report by: Eileen Rowand, Executive Director (Finance and Corporate Services)

Wards Affected: All

Purpose

The purpose of this report is to provide members with a strategic overview of Fife Council's finances and to report the current forecast position for 2023-24.

Recommendations

It is recommended that members:-

- (i) note the high-level financial position as detailed in this report;
- (ii) note that there are ongoing financial impacts arising from the current economic climate which continue to be managed by Services with an element of protection from inflationary risk being accounted for centrally;
- (iii) instruct Services to mitigate overspends as far as possible and ensure strong financial management;
- (iv) note that detailed monitoring reports will be submitted to the relevant Scrutiny Committees; and
- (v) request that Scrutiny Committees ensure appropriate level of support and challenge in relation to financial reports.

Resource Implications

General fund services are predicted to overspend by £5.270m, however, there is funding that must be ringfenced and used for specific expenditure next year (e.g. PEF, DSM, etc). Allowing for these amounts being carried forward suggests that the overspend being managed across services is in the region of £9.349m. Council tax income is also lower than expected by around £1.200m.

However, since the last report, non-teaching pay awards have been agreed and both the costs and the full level of funding for pay are now known. As previously reported, the budget provision for pay awards, combined with the level of funding provided, has led to a better than anticipated funding position for the current year. In addition, an underspend on loans charges has emerged mainly due to lower than expected borrowing and high interest rates increasing the amount of interest received. Combined, these items are forecast to underspend by £16.490m and will be one off in nature. This favourable position will offset the overspends above, resulting in an overall underspend of £10.020m. The favourable position on pay has been built into the budget gap calculation for 2024-25 and is therefore not recurring.

The changes in forecast will lead to the level of uncommitted balances improving, rising from £13.241m in the last report to £25.995m. This improvement is linked to the increased underspends mentioned above and a reduction in the earmarked value for DSM carry forward.

The scale of financial pressures on the council, linked to continued inflationary cost pressures going forward, remain substantial and uncertain. Some services are managing large overspends and actions to minimise or mitigate these should be taken.

Legal & Risk Implications

There are no direct legal implications arising from this report.

Impact Assessment

An EqIA is not required because the report does not propose a change or revision to existing policies and practices.

Consultation

None.

1.0 Background

- 1.1 The report focuses on the overall financial position of the council and provides commentary on significant issues which impact on the financial position of the council. Detailed explanations of forecast variances and analysis by Service is detailed in Appendices 1 to 4 of this report.
- 1.2 There are continued uncertainties which may be significant given the wider economic situation, inflationary pressures impacting all supply chains (notably energy, fuel, construction costs and other commodities) and employee costs as well as uncertainty associated with future funding levels and uncertain future interest rates.
- 1.3 More detailed financial reports are presented to the relevant Scrutiny Committees as part of the council's wider scrutiny and performance management reporting arrangements. It is the role of the Scrutiny Committees to carry out in-depth scrutiny of the financial performance of functions within their remit.

2.0 Financial Overview – General Fund

Pay Award

- 2.1 The pay awards for 2023-24 for teachers were settled in March 2023. The council made provision for a pay award, however, the outcome of the pay settlement will cost less than the provision in the budget combined with the level of funding being provided for that group of staff.
- 2.2 At the time of writing, the budget for the newly agreed pay award for 2023-24 for non-teaching staff was still held centrally but now that the pay award has been agreed, Services' budgets will be increased in December accordingly. The budget provision combined with the grant funding provided is greater than the increased costs of the pay settlement resulting in a favourable variance which is reflected in the obligations / contingencies line of Appendix 1.

- 2.3 The Scottish Government has confirmed they will fund elements of the pay award for 2023-24 with £155m funding being made available across. Fife's share is estimated to be £10.438m. The Scottish Government have also agreed a funding package for the remaining elements of the pay award which is expected to be documented in the Local Government settlement due to be published on 21 December 2023, at which point Fife's share will be known. Estimated funding levels have been included in this projected outturn.

COVID-19 Recovery

- 2.4 At this point in time, the additional net costs associated with COVID-19 are estimated to be £4.5m for 2023-24, this includes £0.6m capital expenditure. Specific funding has been identified for £1.5m of these costs leaving £2.3m being absorbed by Services.
- 2.5 Loss of income projected at £2.243m remains a particular challenge in several areas and may take several years to recover. Where legacy COVID costs are resulting in Directorate overspends, they will be funded from earmarked balances while an element of COVID funding still remains. These are deducted in the final column of Appendix 1 as an adjustment to the forecast.

Other pressures – Economic Conditions/Cost of Living Crisis

- 2.6 The current economic situation is concerning in terms of the continued financial repercussions of high inflation and high interest rates. These inflationary pressures mean the council is already experiencing increased costs, most notably, energy costs (a further £6.0m in 2023-24) along with others such as food, fuel and other commodities. Whilst inflation has reduced from the highs at the end of 2022, costs of supplies and services continue to be impacted.
- 2.7 The cost-of-living crisis is increasingly affecting households and, as such, commitments for several approved Cost of Living support measures are reflected in the budget.

2023-24 Revenue Budget

- 2.8 The current revenue budget has increased from £1,000m to £1,016m and is shown in Appendix 1. The changes made to the budget since the last report reflect budget being moved from general fund balances to Services. The table below details these changes:

Table 1 – General Fund – Revenue Budget Movement

	Total Expenditure £m
2023-24 Budget (August 2023)	1,000.522
Budgets Funded from/(to) Balances	
- Carry Forward - Others	0.025
- Community Recovery Fund	0.700
- Energy Management Revolving Fund	2.713
- CFCR	11.752
Current 2023-24 Budget (October 2023)	1,015.712

Budgets moved from balances include Community Recovery Fund, CFCR. The Energy Management Revolving Fund has also been moved from balances to Services' budget to increase transparency and flexibility on how this fund can be used.

2023-24 Annual Forecast

- 2.9 The current forecast estimates an underspend in the current year of £10.020m. This is a combined result of service overspends of £5.270m (0.57% of budgeted expenditure), an underspend of £16.490m in Additional Items and lower than planned income from Council Tax of £1.2m. Details are shown in Table 2 below:-

Table 2 – General Fund – 2023-24 Summarised Forecast Statement

	Annual Budget	Forecast	Variance	Variance excluding cfwd commitments
	£m	£m	£m	£m
Service Totals	929.547	934.817	5.270	9.349
Additional Items	86.165	69.675	(16.490)	(16.490)
Total Expenditure	1,015.712	1,004.492	(11.220)	(7.141)
Financing	(1,015.712)	(1,014.512)	1.200	1.200
CONTRIBUTION (TO) / FROM BALANCES	0.000	(10.020)	(10.020)	(5.941)

- 2.10 Overall, services are projecting an overspend of £5.270m.

Education and Children’s Services Directorate are forecasting an overspend of £0.235m. The dominant factors are long-term absence and maternity overspend of £3.051m, an overspend in Special Education of £1.209m arising from costs of secure child placements and the cost of additional transport arrangements for children. Children and Families face a pressure on the purchased placement budget of £3.155m due to a change in the mix of placement types with an increase in higher cost residential care. Additionally, the anticipated cost of the introduction of new national foster and kinship care rates of £1.590m. The movement since the last report of £0.663m reflects the updated budget positions following the annual budget adjustment exercise. The overspends are offset by underspends on DSM scheme, Pupil Equity Fund and Whole Family Well-being projects. The underspends will be carried forward to cover costs next financial year.

Communities & Neighbourhoods Service is forecasting an overspend of £3.447m driven by continued loss of income resulting from reduced demand for some services including Fife Sports and Leisure Trust, Fife Cultural Trust, Community Use of Schools and Halls and Centres. The movement of £0.270m is mainly due to a change in the forecast for the Fairer Fife budget.

Within Enterprise & Environment, Property Repairs and Maintenance is forecasting an overspend of £1.5m and an overspend of £0.936m in Grounds Maintenance. Domestic Waste is also forecasting an overspend of £1.228m and winter maintenance is expected to overspend by £0.791m. These overspends are offset by an underspend of £1.181m on Energy Management projects.

The overspend on services is offset by an underspend of £4.658m in Loan Charges and an underspend of £11.832m on contingencies.

The Loan Charges underspend results from lower borrowing from the loans fund in 2022-23 due to the level of cash held and lower capital costs, in turn, resulting in reduced interest costs. There will be an increase in the cost of borrowing in future given the significant level of planned capital costs over the lifetime of the capital investment plan. The underspend is partially due to increased interest on the level of cash held and invested in the Loans Fund as the interest received is much higher than planned due to the level of balances held and much higher interest rates being applied.

During the budget process, provision is made for additional costs associated with inflation and pay awards. These budgets are held centrally in 'Obligations/Contingencies' until costs are known and then the appropriate amount of budget is then transferred to Services to fund the costs.

The estimated underspend of £11.832m reflects, in the main, the funding provision for all pay awards is higher than the costs of the pay settlement by £10.567m. The pay inflation assumption in the current year was perhaps higher than other councils had provided for and pay awards were negotiated nationally.

This has increased since the last report as the non-teaching pay awards and funding packages have been agreed.

- 2.11 Council tax income is £1.2m lower than planned because the level of Council Tax Reduction is greater than expected and results in a reduced yield from Council Tax compared to the budgeted levels, this may be linked to the cost-of-living crisis. This is an improvement since last year because of an increase in the number of band D equivalents now on stream.
- 2.12 The forecast position for the year is an underspend of £10.020m but there are some one-off items that skew the reported position. To assist with understanding, a column has been added to Appendix 1 which adjusts these one-off items to show the likely position after the year end and the likely impact on general fund balances. Some service underspends totalling £6.999m will be earmarked reserves to be used for specific costs next year and are subject to certain conditions. These underspends will not increase the uncommitted balances. In addition, some overspends (currently estimated at £2.920m) may be funded from existing commitments against balances, for example, impacts relating to COVID-19 and some additional inflationary costs. After these adjustments, it is estimated that the final impact on the level of general fund balances will be an increase of £5.941m. Section 4 below provides more information on balances position.
- 2.13 Where Service budgets were reduced during the budget process, close monitoring of Service overspends will identify any areas of emerging risk. Services should continue to apply sound financial management practices and mitigate against any overspends and take corrective action to maintain costs within budget wherever possible.
- 2.14 The service level variances and movement are set out and explained in more detail at Appendices 1 and 2.

3.0 Financial Overview – Housing Revenue Account

Housing Revenue Account (HRA)

- 3.1 The Housing Revenue (HRA) Account forecast position is shown in Appendix 3.

- 3.2 As a result of significant pressures across the HRA, it is projected that the CFCR will need to reduce by £3.294m to offset overspends across the HRA. Repairs and Maintenance is forecasting an overspend of £5.381m which is due to both an increased volume of Change of Tenancy (COTs) in year and continued high inflation on materials and employee costs. The increased volume of COTs was a result of a recent Temporary Accommodation Court Judgement which awarded a number of Homelessness tenants a secure Tenancy which led to a high level of transfer led policies in year. All transfers as a result of the judgement will be completed this year.
- 3.3 The HRA will transfer resources from balances of £1.904m which will fund increased investment into Adaptations of £0.500m, Estates Management & Fencing of £0.545m and £0.859m to maintain the required level of CFCR for the year, as previously approved. The HRA has a policy to maintain uncommitted balances at around 2% of Net Rental Income. Contributions required to maintain minimum balances at this level are built into business planning assumptions.
- 3.4 Appendices 3 and 4 provide further detailed variance analysis and commentaries on all variances that exceed +/- £250k.

4.0 Balances

4.1 General Fund Balances

- 4.1.1 Appendix 5 details the forecast General Fund balances position which are held to fund specific one-off expenditure, provide funding to contribute to change initiatives, identify funds for specific or “earmarked” purposes and to mitigate against risk by providing a level of uncommitted resource which can be drawn on to respond to “financial shocks” such as unforeseen cost increases.
- 4.1.2 The opening balance of £216.054m was exceptional but was a result of a number of factors, including revised accounting arrangements for Service Concession arrangements as well as levels of grant funding received but not needed in the year. Budgets of £52.444m have been transferred to Services and to Capital to fund the capital plan. The current forecast underspend of £10.020m detailed in Section 2 will increase the level of balances to £173.630m.
- 4.1.3 Some of the current service underspends must be immediately earmarked to honour guaranteed carry forward arrangements such as Devolved School Management (DSM), Pupil Equity Funding (PEF) and Whole Family Wellbeing Fund.
- 4.1.4 Funding for commitments against balances for funding specific items are moved to Service budgets based on need as it arises.

Earmarked and Commitments against Balances

- 4.1.5 The earmarked balances reflect unused grants and ring-fenced income which will fund specific expenditure. Balances are also earmarked for dealing with the ongoing costs associated with recovery from the pandemic and the impacts of inflation and supply chain disruption.
- 4.1.6 Commitments represent items for which provision has been made but the costs are estimated and yet to be incurred.

- 4.1.7 After taking account of all earmarked balances and commitments, the level of uncommitted balances as at 31 March 2026 is expected to be £25.995m which equates to approximately 2.56% of the revenue budget. This is an increase from previously reported as a result of the favourable movement due to pay settlement and a reduction in the commitment for DSM. The policy minimum is to maintain a level of 2% balances over a rolling three year period which means that the level can dip below 2% level provided it returns to 2% within three years.
- 4.1.8 There is no plan, at this stage, to budget to restore balances but the position will be monitored. This will be kept under review and committee will be provided with regular updates in future reports.

4.2 HRA Balances

- 4.2.1 The opening HRA balance was £7.380m. There are planned withdrawals in year totalling £1.904m which are detailed in Appendix 4, leaving an estimated uncommitted balance of £5.476m at 31 March 2024. Further commitments have been in 2024-25 taking the estimated uncommitted balance to £2.976m.

5.0 Conclusions

- 5.1 The overall forecast underspend is £10.020m. However, general fund services are overspending to a greater degree than would first appear and this is because some funding is ringfenced for specific costs and will be carried forward to next year. The entirety of the service overspends will be offset this year, substantially from an underspend in contingencies that will not be available in future. Some of these Service overspends will need some corrective/mitigating actions to bring costs down to a more sustainable level, particularly going forward. In the meantime, there is some short-term assistance being provided where overspends are related to COVID-19 or increased inflation.
- 5.2 The positive balances position is providing the council with a level of protection from significant cost increases and other financial risks but, given balances is one off in nature, they will only be able to assist the council's financial sustainability in the very short term, leaving challenges ahead for the medium and longer term. Allowing for all commitments, the uncommitted level of balances is estimated as £25.995m which is above the policy minimum. No plans are underway at the moment to restore balances. The position is closely monitored over the year.
- 5.3 The forecast position for the council's Housing Revenue Account in 2023-24 is an overspend of £1.904m which is being funded as planned from HRA balances. The level of HRA balances, allowing for all commitments, is £2.505m which is in line with the policy minimum.

List of Appendices

1. General Fund Revenue Summary 2023-24
2. General Fund Variance Analysis
3. Housing Revenue Account Summary 2023-24
4. Housing Revenue Account Variance Analysis
5. Summary of Balances

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FIFE COUNCIL
GENERAL FUND REVENUE SUMMARY 2023-24

	Annual Budget £m	Forecast £m	Variance £m	Previous Committee Annual Variance £m	Movement £m	Variance excluding funding commitments £m
EDUCATION & CHILDREN'S SERVICES						
Education (Devolved)	247.399	243.427	(3.972)	(7.634)	3.662	0.000
Education (Non Devolved)	123.220	125.687	2.467	6.147	(3.680)	2.467
Children and Families	66.914	68.697	1.783	1.118	0.665	3.028
Criminal Justice Service	0.102	0.059	(0.043)	(0.059)	0.016	(0.043)
	437.635	437.870	0.235	(0.428)	0.663	5.452
HEALTH & SOCIAL CARE						
Health & Social Care	215.750	214.978	(0.772)	(0.707)	(0.065)	(0.772)
Contribution to IJB		0.772	0.772	0.707	0.065	0.772
	215.750	215.750	0.000	0.000	0.000	0.000
ENTERPRISE & ENVIRONMENT						
Assets, Transportation and Environment Planning	104.750	106.523	1.773	2.479	(0.706)	2.515
Protective Services	1.832	1.648	(0.184)	(0.087)	(0.097)	(0.184)
Business & Employability Service	2.604	2.733	0.129	0.036	0.093	0.129
Property Repairs and Maintenance	6.125	6.115	(0.010)	(0.044)	0.034	(0.010)
	14.581	16.081	1.500	1.000	0.500	1.500
	129.892	133.100	3.208	3.384	(0.176)	3.950
COMMUNITIES						
Housing & Neighbourhood Services	14.431	14.975	0.544	0.345	0.199	0.544
Communities & Neighbourhood Customer & Online Services	53.577	57.024	3.447	3.177	0.270	1.204
	15.542	15.503	(0.039)	0.047	(0.086)	(0.039)
	83.550	87.502	3.952	3.569	0.383	1.709
FINANCE & CORPORATE SERVICES						
Assessors	2.005	1.989	(0.016)	0.080	(0.096)	(0.016)
Finance	5.408	5.178	(0.230)	(0.214)	(0.016)	(0.230)
Revenue & Commercial Services	15.627	15.111	(0.516)	(0.352)	(0.164)	(0.516)
Human Resources	6.923	6.356	(0.567)	0.250	(0.817)	(0.204)
Business Technology Solutions	18.758	18.793	0.035	(0.107)	0.142	0.035
Legal & Democratic Services	4.180	4.237	0.057	0.053	0.004	0.057
	52.901	51.664	(1.237)	(0.290)	(0.947)	(0.874)
Miscellaneous	0.186	0.186	0.000	0.000	0.000	0.000
Housing Benefits	6.628	5.594	(1.034)	0.000	(1.034)	(1.034)
	59.715	57.444	(2.271)	(0.290)	(1.981)	(1.908)
CHIEF EXECUTIVE						
Chief Executive	0.307	0.289	(0.018)	(0.015)	(0.003)	(0.018)
Corporate and Democratic Core	2.698	2.862	0.164	0.164	0.000	0.164
	3.005	3.151	0.146	0.149	(0.003)	0.146
SERVICE TOTALS	929.547	934.817	5.270	6.384	(1.114)	9.349
ADDITIONAL ITEMS						
Loan Charges (including interest on revenue balances)	54.919	50.261	(4.658)	(2.283)	(2.375)	(4.658)
Capital Expenditure Financed from Current Revenue	14.039	14.039	0.000	0.000	0.000	0.000
Obligations / Contingencies	17.207	5.375	(11.832)	(5.256)	(6.576)	(11.832)
	86.165	69.675	(16.490)	(7.539)	(8.951)	(16.490)
TOTAL EXPENDITURE	1,015.712	1,004.492	(11.220)	(1.155)	(10.065)	(7.141)
FINANCED BY:						
General Revenue Grant	(599.616)	(599.616)	0.000	0.000	0.000	0.000
Non Domestic Rates	(172.123)	(172.123)	0.000	0.000	0.000	0.000
Council Tax Income	(191.529)	(190.329)	1.200	1.800	(0.600)	1.200
Budgets transferred to/(from) Balances (previous years carry forwards etc)	(52.444)	(52.444)	0.000	0.000	0.000	0.000
TOTAL INCOME	(1,015.712)	(1,014.512)	1.200	1.800	(0.600)	1.200
CONTRIBUTION (TO)/FROM BALANCES	0.000	(10.020)	(10.020)	0.645	(10.665)	(5.941)

Appendix 2

FIFE COUNCIL
VARIANCE ANALYSIS

GENERAL FUND

Area	Current underspend / overspend	Forecast Variance £m	Previous variance £m	Movement in variance £m	Commentary
Education (Devolved)	underspend	(3,972)	(7,634)	3,662	<ul style="list-style-type: none"> Schools' devolved budgets (DSM) underspend of (£0.850m) reflects updated projections from Business Managers following the annual budget adjustment exercise to align school budgets to school rolls from August; Pupil Equity Funding (PEF) underspend of (£3.500m) is estimated for 2023-24 based on previous years trends in expenditure across schools; Early Years +£0.128m overspend and Special Education +£0.186m overspend, the latter mainly due to a delay in implementing management review. Movement since last report is mainly due to a reduction in the projected underspend in DSM budgets following flexing of £2.350m, and a reduction in projected PEF underspend of £1,000m.
Education (Non Devolved)	overspend	2,467	6,147	(3,680)	<ul style="list-style-type: none"> Maternity and long term absence cover costs across schools +£3,051m overspend; Special Education +£1,209m overspend, mainly due to education element of secure child placements of +£0.924m and additional transport costs of +£0.875m offset by an underspend on staffing due to additional funding of (£0.590m); General Education (£1.604m) underspend due to an underspend on additional Scottish Government funding of (£1.975m) for staffing due to lead in times for staffing changes for PSA's, and the net effect of adjusting schools' budgets for new roll numbers from August of (£0.835m) reflecting a reduction in 19 classes across Primary and the effect of probationer funding, offset by a projected overspend from unachieved savings of £0.660m; Underspend of (£0.691m) in transport costs in Secondary sector Overspend on Education Administration of +£0.229m due to increased premises costs and supplies and services in relation to licences and professional fees; Movement from the previous report is mainly due the underspend on General Education due to the impact of adjusting schools' budgets for rolls from August and and underspend on Scottish Government funding of (£2.477m), the underspend on transport costs within Secondary of (£0.681m) and a reduction in the projection for long term absence and maternity of (£0.415m).

GENERAL FUND

Area	Current underspend / overspend	Forecast Variance £m	Previous variance £m	Movement in variance £m	Commentary
Children and Families	overspend	1.783	1.118	0.665	<ul style="list-style-type: none"> • Overspend on Purchased Placements of £3.155m due to an increased number of secure and residential placements, partly offset by an over recovery of income; • Overspend on Continuing Care of £0.484m due to spend being in excess of Scottish Government funding and Respite of £0.567m due to increased demand; • Overspend on internal residential service of £0.932m; • Underspend on Whole Family Wellbeing Fund of (£1.245m) due to lead in time for recruitment and implementation of plans; • Underspend of (£1.415m) on other staffing due to vacancies and recruitment lead in times; • Underspend on in-house foster care of (£1.344m), kinship care of (£0.547m) due to the shifting balance of care, although these underspends are reduced by an estimate of the financial impact of the new national foster and kinship rates to be implemented from 01.04.23 which is anticipated to result in a financial pressure of £1.590m; • Supported lodgings (£0.361m) due to government funding of Unaccompanied Asylum Seeker Children being more than cost of placements • Movement since last report is due a £1.331m increase in purchased placements from 127 at August to 132 October (of which 6 are new high cost residential packages and 1 reduction in Foster care), alongside an increase in Whole Family Wellbeing funding spend of £0.352m, partially offset with an increase in Unaccompanied Asylum Seeker Children funding of (£0.449m), a reduction in Direct Payments forecasted spend of (£0.296m) and a reduction in professional fees spend of (£0.247m)
HEALTH & SOCIAL CARE					
Health & Social Care	underspend	(0.772)	(0.707)	(0.065)	<ul style="list-style-type: none"> • Adult Placements overspend +£3.888m due to greater volume of adult packages being commissioned; • Older People Residential & Daycare overspend +£1.499m due to increased agency costs, partly offset by vacancies in the service; • Care at Home overspend +£2.533m due to an increase in Direct Payments and commissioning of older people care packages and a delay in achieving the Bed Based Modelling saving, which is partly offset by an underspend in staffing due to difficulties in recruiting staff. • Adults Supported Living underspend (£4.011m) due to vacancies across the service which will not be filled until the future design of the service is established; • Fieldwork Teams underspend (£0.724m) due to vacancies which are partly offset by overspends on transport costs for taxis to college; • Integrated Professional & Business Enabling underspend (£1.038m) due to vacancies and delays in starting projects within the Carers Act funding; • Adults Five Wide underspend (£1.819m) due to additional funding for specific individuals not expected to be required as they are currently in hospital. • Older People Nursing & Residential underspend (£1.343m) due to reduction in the number of packages commissioned and increased Income from Financial Assessments.

FIFE COUNCIL
VARIANCE ANALYSIS

Appendix 2

GENERAL FUND

Area	Current underspend / overspend	Forecast Variance £m	Previous variance £m	Movement in variance £m	Commentary
Contribution to LJB	overspend	0.772	0.707	0.065	<ul style="list-style-type: none"> Whilst the council side of the LJB has an underspend, overall the LJB is projecting an overspend. A financial recovery plan has been agreed by the LJB to reduce the overspend. In the event that this does not remove the overspend then general reserves will be used to fund the overspend in the first instance. At this stage we are not expecting to have to implement the risk share agreement but the success of the financial recovery plan will be closely monitored and future reports will update on the likelihood of this having to be activated.
ENTERPRISE & ENVIRONMENT					
Assets, Transportation and Environment	overspend	1.773	2.479	(0.706)	<ul style="list-style-type: none"> Grounds Maintenance overspend of £0.936m due to recruiting to a higher level of staffing compared to previous years, and an overspend on transport costs relating to hires and repairs of an aging fleet; Domestic Waste & Street Cleaning overspend of £1.228m due to continuing issues around transport, hires and repairs of an aging fleet as well as increased staffing costs to cover absences; Roads and Transportation overspend of £0.791m primarily relates to Winter Maintenance overspend as a result of increases to labour, vehicle, and fuel costs; Property Services underspend of (£1.181m) primarily as a result of an underspend on the Energy Management Revolving Fund (EMRF) due to internal resources being prioritised on key Council Capital projects such as new build schools, care homes and essential maintenance work. Moving forward additional resources will be appointed to support the delivery of the carbon reducing projects, in parallel with identifying cost reducing projects which would be funded by EMRF where the necessary criteria is met. Movement of (£0.706m) is due to the underspend on EMRF.
Property Repairs and Maintenance	overspend	1.500	1.000	0.500	<ul style="list-style-type: none"> Property Repairs and Maintenance Projected overspend of £1.500m relates primarily to compulsory requirement for Additional Electrical Testing and increased boiler replacements being required. Movement of £0.500m due to the number of boiler replacements being required increasing.
COMMUNITIES					
Housing & Neighbourhood Services	overspend	0.544	0.345	0.199	<ul style="list-style-type: none"> There is a projected overspend of £0.230m for the use of hotel accommodation and £0.159m on the use of B&Bs in year. Spend on both of these has been required in year as a result of high demand for homelessness accommodation. There is an overspend and movement of £0.189m relating to the maintenance and servicing of disability adaptations equipment. This is due to both an increasing volume of equipment to maintain and the level of maintenance required in year.

FIFE COUNCIL
VARIANCE ANALYSIS

Appendix 2

GENERAL FUND

Area	Current underspend / overspend	Forecast Variance £m	Previous variance £m	Movement in variance £m	Commentary
Communities & Neighbourhood	overspend	3,447	3,177	0,270	<p>A legacy from the pandemic continues to impact on level of demand and income received for some services. These include:-</p> <ul style="list-style-type: none"> • Fife Sports and Leisure Trust and Fife Cultural Trust have an estimated total deficit £1,231m. Council officers continue to review the areas where the level of income received has been impacted by the pandemic and both Trusts continue to receive temporary financial support from the Council; • Community Use and Halls and Centres overspend £1,012m due to lost income. Work is underway as part of the Community Use Plan for increased marketing and consultation with communities to ensure they are offering what communities want and that there are no barriers preventing the community from accessing these services; • Higher than anticipated Non Domestic Rates costs of £0,175m; • Unachieved historical savings of £0,484m across the service; • Unachieved turnover £0,500m across the service; 5% vacancy management targets are built into service staffing budgets. Vacancies within areas of the service have not been enough to meet this 5% target; • The movement of £0,270m mainly relates to a change in the forecast for Fairer Fife. This was previously forecast as £0,300m underspend and is now forecast on budget as it being utilised to fund overspends across the service. The movement also relates to higher than anticipated Non Domestic Rates costs offset by an decrease in support required to the Trusts of (£0,169m).
FINANCE & CORPORATE SERVICES					
Revenue & Commercial Services	underspend	(0,516)	(0,352)	(0,164)	<ul style="list-style-type: none"> • Underspend mainly relates to pay costs - staff turnover/non filling of vacancies (£0,594m), which is partly offset by overspends on supplies & services £0,089m
Human Resources	underspend	(0,567)	0,250	(0,817)	<ul style="list-style-type: none"> • Overspends relate to agreed additional HR Resources £0,222m and workstyles £0,016m which are covered by COVID funding, offset by underspends on staff costs due to vacancies (£0,214m), and the Youth Investment Fund (£0,601m) which would be carried forward to 2024-25.
Business Technology Solutions	overspend	0,035	(0,107)	0,142	<ul style="list-style-type: none"> • Overspends relate to Blended Meetings/Workstyles £0,337m funded from COVID and Oracle Evolve contract £0,253m, offset by an underspend on staff costs due to vacancies (£0,620m)
Housing Benefits	underspend	(1,034)	0,000	(1,034)	<ul style="list-style-type: none"> • Underspend relates to Empty Property Relief (EPR) funding which was devolved by the Scottish Government this financial year (£0,942m). This is also the reason for the movement from August
ADDITIONAL ITEMS					

Appendix 2

FIFE COUNCIL
VARIANCE ANALYSIS

GENERAL FUND

Area	Current underspend / overspend	Forecast Variance £m	Previous variance £m	Movement in variance £m	Commentary
Loan Charges (including interest on revenue balances)	underspend	(4,658)	(2,283)	(2,375)	The projected underspend is made up of 3 factors, Principal, Interest and Interest on Revenue Balances (IORB). The projected underspend on Loan Charges Principal is due to the actual borrowing from the Loans Fund being less than anticipated at the time the budget was set. The projected underspend on interest is due to actual borrowing carried out in year being less than anticipated at the time the budget was set. The projected underspend also includes a forecast for the IORB expected to be credited to the General Fund this year. IORB is interest earned by the General Fund for investing general fund balances in the Loans Fund. The movement reflects the inclusion of IORB in this forecast. IORB is difficult to predict with any certainty as it is dependent on borrowing needs, cash flow and interest rates applied, therefore this calculation has been completed part way through the year as these things have become known.
Obligations / Contingencies	underspend	(11,832)	(5,256)	(6,576)	The projected underspend on Legislative Obligations reflects the estimated additional grant funding due to be received from the Scottish Government to assist with the funding of pay awards. As Fife Council had already made some budget provision for the pay award, the Government funding is substituting that provision meaning that the budget provided is greater than the costs incurred. The movement in the underspend reflects that estimated costs of all agreed pay awards.
INCOME					
Council Tax Income	overspend	1,200	1,800	(0,600)	The under recovery of income is as a result of increased levels of Council Tax Reduction being applied which is greater than the level of funding received from the government. Further the total council tax yield is less than budget as a result of increased levels of non-payment. This has been partially offset by an increase in Band D equivalents that come have on stream. This accounts for the movement since the last projection.

FIFE COUNCIL
HOUSING REVENUE ACCOUNT SUMMARY 2023-24

	Annual Budget £m	Forecast £m	Variance £m	Previous Committee Annual Variance £m	Movement £m
BUDGETED EXPENDITURE					
Repairs and Maintenance	40.377	45.758	5.381	7.290	(1.908)
Supervision and Management	21.464	20.718	(0.746)	(0.581)	(0.165)
Funding Investment:-					
Cost of Borrowing	32.859	31.816	(1.043)	0.000	(1.043)
Revenue Contribution (incl CFCR)	27.328	23.945	(3.382)	(6.676)	3.294
	122.028	122.237	0.210	0.033	0.177
Voids	2.610	2.695	0.085	0.435	(0.351)
Housing Support costs	(0.474)	(0.474)	0.000	0.000	0.000
Garden Care Scheme	0.449	0.448	(0.001)	(0.002)	0.000
Bad or Doubtful Debts	3.150	3.150	0.000	0.000	0.000
Other Expenditure	11.629	13.234	1.605	1.566	0.039
Covid Expenditure	0.000	(0.000)	(0.000)	(0.000)	0.000
	139.392	141.290	1.898	2.032	(0.134)
FINANCED BY					
Dwelling Rents (Gross)	(132.249)	(132.249)	0.000	0.000	0.000
Non Dwelling Rents (Gross)	(3.589)	(3.545)	0.044	0.000	0.044
Hostels - Accommodation charges	(2.202)	(2.267)	(0.065)	(0.031)	(0.034)
Other Income	(1.352)	(1.325)	0.027	(0.097)	0.124
	(139.392)	(139.386)	0.006	(0.128)	0.134
CONTRIBUTION (TO) / FROM BALANCES	0.000	1.904	1.904	1.904	(0.000)

FIFE COUNCIL
VARIANCE ANALYSIS

Appendix 4

HOUSING REVENUE ACCOUNT

Area	Forecast Variance £m	Previous variance £m	Movement in variance £m	Commentary
Repairs and Maintenance	5,381	7,290	(1,909)	<ul style="list-style-type: none"> • +£3,347m overspend on Responsive Repairs to continuing high costs from inflation and material prices. • +£2,854m overspend, movement (£2,151m) on Change of Tenancy (COT) due to ongoing impact of Court Judgement which has increased the volume of COTs in year and due to rising prices from inflation and increasing material costs. The Court Judgement conversions will complete in year. The movement is a result of improved processes made to control costs. • The above overspends are partially offset by underspends on Gas Maintenance and Servicing costs of (£0,722m) and Planned Maintenance of (£0,592m). The reduction in gas costs is due to the increase in the cost of gas works not being as high as anticipated at the time of budget setting and the planned maintenance is due to managing the level of works carried out in year. • +£0,545m overspend on increased Estates Management and a Fencing Pilot. The £0,545m is funded from balances.
Supervision and Management	(0,746)	(0,581)	(0,165)	<ul style="list-style-type: none"> • The underspend and movement is related to vacancies across the Housing Service
Cost of Borrowing	(1,043)	0,000	(1,043)	<ul style="list-style-type: none"> • The Cost of Borrowing for the year is calculated during budget setting based on the anticipated level of borrowing required in year. This is recalculated in year based on current projections. This has resulted in a reduction in the anticipated level of borrowing.
Revenue Contribution (Incl CFGR)	(3,382)	(6,676)	3,294	<ul style="list-style-type: none"> • The projected CFGR has improved by +£3,294m due to the revised projections on Change of Tenancy and Cost of Borrowing. Despite this the result is still a lower than planned contribution to the HRA Capital Programme. There will be an impact on the funding required to support the HRA Capital Programme as a result of the reduced CFGR.
Voids	0,085	0,435	(0,351)	<ul style="list-style-type: none"> • The movement on Voids is due to an improvement to Change of Tenancy processes which have decreased the length of time properties remain vacant.
Other Expenditure	1,605	1,566	0,039	<ul style="list-style-type: none"> • +£0,861m overspend and movement mainly relates to Hostel Expenditure. Hostels income is not sufficient to cover operating costs. The Homelessness service are working on delivery models which will look to reduce / eliminate the hostels overspend. This will include measurements proposed in the Fife's Homelessness Reduction Plan 2023/25 presented to Cabinet on 5th October. • +£0,500m overspend for Disability Adaptations which is funded from balances. This will allow for an increase in the number of adaptations in year and reduce waiting list times. • +£0,190m overspend relates to increased utility costs.
Net Withdrawal from Balances	1,904	0,000	0,000	<ul style="list-style-type: none"> • +£0,545m & +£0,500m withdrawals for estates, fencing and adaptations detailed above. • +£0,859m relates to contributions into balances at the end of 2022-23. This will be withdrawn in 2023-24 to assist with maintaining the level of CFGR required.

<ul style="list-style-type: none"> • £4,526m overspend on Change of Tenancy due to ongoing impact of Court Judgement which has increased the volume of COTs and due to rising prices from inflation and increasing material costs. The Court Judgement conversions should complete in year. • £1,826m overspend on Responsive Repairs to continuing high costs from inflation and material prices. • £0,545m overspend on increased Estates Management and a Fencing Pilot. The £0,545m is funded from balances. 	<p>FY only - previous commentary - Aug 2023</p>
<ul style="list-style-type: none"> • The underachievement of CFGR is due to the increased spends across the HRA. The result is a much lower than planned contribution to the HRA Capital Programme. There will be an impact on the funding required to support the HRA Capital Programme as a result of the reduced CFGR. 	
<ul style="list-style-type: none"> • Judgment on Temporary Accommodation meaning a large number of HRA rental properties are being re-provisioned as temporary 	
<ul style="list-style-type: none"> • £0,500m overspend for Disability Adaptations which is funded from balances. This will allow for an increase in the number of adaptations in year and reduce waiting list times. • £0,190m overspend relates to increased utility costs. 	
<ul style="list-style-type: none"> • £0,545m & £0,500m withdrawals for estates, fencing and adaptations detailed above. • £0,859m relates to contributions into balances at the end of 2022-23. This will be withdrawn in 2023-24 to assist with maintaining the 	

**FIFE COUNCIL
BALANCE - GENERAL FUND SERVICES**

	2023-24 £m	2024-25 £m	2025-26 onwards £m
Balance at 1 April 2023	(216.054)	(130.780)	(66.836)
Budgets transferred (to)/from balances	52.444		
Add Overall budget variance 2023-24 (Appendix 1)	(10.020)		
Estimated General Fund Balance at 31 March	(173.630)	(130.780)	(66.836)
Earmarked Balance			
Devolved School Management		0.472	
Energy Management Fund		1.181	
Council Tax - Second Homes	0.850	5.000	3.046
SG Specific funding	0.291	4.745	
Specific Carry Forwards	0.198	0.601	
COVID-19 Funding:			
Continuing Financial Consequences of COVID-19	1.519	5.203	1.106
Community Recovery Fund	4.300	4.876	0.000
COMIS/SWIFT delay	1.000	1.185	
Inflation - Supplies & Services	1.905		
Capital Investment Plan:			
CFCR	5.335	17.461	
Service Concessions		10.000	24.539
Capital Plan Review – Additional Funding	17.000		
Total Earmarked	32.398	50.724	28.691
	(141.232)	(80.056)	(38.145)
Commitments against balance			
Budget Carry Forward Scheme			
Change Programme	4.900	5.000	
Demographics/Pay/Pensions	5.000	5.000	8.000
Fife Job Contract		0.816	
Barclay Funding - Assessors		0.064	
Workforce Change	0.123	2.000	4.000
Lease Surrender - The Kirkcaldy Centre		0.340	0.150
Election	0.342		
Other Commitments	0.087		
Total Commitments	10.452	13.220	12.150
Estimated uncommitted balance at 31 March	(130.780)	(66.836)	(25.995)

BALANCE - HOUSING REVENUE ACCOUNT

	2023-24	2024-25	2025-26
	£M	£M	onwards
			£M
Balance at 1 April 2023	0.000	1.904	1.904
Add Overall budget variance 2023-24 (Appendix 2)	1.904		
Estimated Balance at 31 March	<u>1.904</u>	<u>1.904</u>	<u>4.404</u>
Earmarked Balance			
Transitional Affordable Housing		2.500	
	<u>0.000</u>	<u>2.500</u>	<u>0.000</u>
Estimated uncommitted balance at 31 March	<u>1.904</u>	<u>4.404</u>	<u>4.404</u>

Capital Investment Plan – Monitoring 2023-24

Report by: Eileen Rowand, Executive Director (Finance and Corporate Services)

Wards Affected: All

Purpose

The purpose of this report is to provide a strategic financial overview of the Capital Investment Plan and to advise on the provisional outturn for the 2023-24 financial year.

Recommendations

The Cabinet Committee is asked to:-

- i) approve the HRA Capital Investment Plan re-phasing as detailed in paragraph 3.1;
- ii) note the projected outturn position and that the level of financial risk continues to be heightened due to high levels of inflation and supply chain challenges;
- iii) note that more detailed capital outturn reports for 2023-24 will be submitted to relevant Scrutiny Committees of the council;
- iv) note that budget variances will be managed by the appropriate Directorate in conjunction with the Investment Strategy Group; and
- v) note the updated prudential indicators provided and that these will be reported on a quarterly basis.

Resource Implications

The updated capital plan approved in June 2023 provided for increased levels of investment to deal with the cost pressures being faced because of inflationary pressures and difficulties in supply chains. There does remain a level of risk given that inflation remains higher than anticipated and that the revised costs were estimates based on known factors at that time. Additionally, interest rates continue to increase which could have an impact on the cost of borrowing in future years of the plan.

Legal & Risk Implications

Potential risks include continuing difficulties across supply chains, rising inflation on costs of construction and availability of funding streams for larger capital projects, e.g. Developers' Contributions and estimated funding levels from Scottish Government. Further detail relating to the current risks is contained in section 2.2.

Impact Assessment

An EqIA is not required because the report does not propose a change or revision to existing policies and practices.

Consultation

Financial projections are agreed in consultation with each Directorate and are based around the expected progress and delivery of individual projects.

1.0 Background

- 1.1 The purpose of this report is to advise members of the high-level projected outturn position for the council's Capital Investment Plan (the Plan) for the financial year 2023-24. The report also highlights the forecast for major projects over £5.000m along with any potential risks associated with these projects. Explanation is provided at Section 2.1 where there is deemed to be a greater level of financial risk linked to major projects. The Plan covers capital expenditure on all council Services including the Housing Revenue Account which is managed and accounted for separately from the General Fund.
- 1.2 Funding strategies including the use of CFCR from general fund balances, service concession arrangements, capital grant, receipts, developers' contributions and borrowing, all identified during the capital plan review process are being utilised to support the level of capital investment included in the plan.

2.0 Issues

2.1 Major Projects

- 2.1.1 Appendix 1 provides a summary of the major projects within the Plan. There are 30 projects/programmes in this category with an overall budget of £1,185.844m.
- 2.1.2 At this stage, cost estimates suggest that there could be an overspend of £0.350m across the life of several major projects in the programme.

Dunfermline Learning Campus is projecting a pressure £1.624m on the project. This is due to an unsuccessful bid for external funding. Work is ongoing to mitigate the pressure, where possible, through other efficiencies in the project, however, any residual pressure may have to be accommodated within the overall Education Capital Plan.

Abbeyview Integrated Hub is projecting a (£2.013m) underspend as the tender returns were lower than anticipated.

Cowdenbeath Leisure Centre Phase 2 is projecting a variance of £0.484m. The project is expected to be completed on budget with contributions of £0.250m from Energy Management, £0.063m Section 75 funding and £0.250m from Property Services being agreed and will be received during the project, reducing the variance.

Within "Maintaining our Assets", the projected variance of £0.254m relates to Adam Smith Creative Hub. This relates to funding that has been approved and the budget will be realigned.

2.2 Potential Risks and Issues

- 2.2.1 Across the Capital Investment Plan, budgets were increased to reflect the likely inflationary pressures, however, there continues to be risk that both the timing and the costs of projects could be adversely affected by the current economic climate. Monitoring of the impact of any additional costs on projects will continue and any significant impact on timescales and associated risks will be reported to this committee.
- 2.2.2 The council's approved Capital Plan includes £213.000m investment in respect of Secondary Schools in West Fife, which includes Dunfermline Learning Campus (DLC) and the Inverkeithing High School replacement. The budgets for the projects reflect the funding arrangements of the Scottish Government's Learning Estate Investment Programme (LEIP) which requires the Council to fund the up-front cost of construction, with government support coming in the form of a revenue contribution based on the

achievement of outcomes. The DLC project is progressing in line with the required timeline with the campus due to open in August 2024. The council has approval through LEIP Phase 2 for a replacement Inverkeithing High School which is due to open in August 2026. Following the Scottish Government advising their decisions in terms of LEIP Phase 3 projects, there is a requirement to consider options in relation to the Glenrothes secondary schools alongside the wider school estate. To inform this, a report will be presented in the early part of 2024 to update members on the condition and suitability of the current school estate and to identify the priorities for investment based on that assessment for consideration as part of the next Capital Plan Review.

2.2.3 Increased costs relating to continuation of the council's Affordable Housing Programme were presented to Cabinet Committee on 6 April 2023 confirming that that additional capital investment would be required to complete the Phase 3 and Transitional Affordable Housing Programmes. The increase in the unit cost per property was a result of continuing inflationary pressures. The additional borrowing required was fully tested for affordability as part of the HRA 2022 Business Plan modelling and incorporated into the current Capital Investment Plan. The capital plan for the HRA will continue to be reviewed for affordability given the current financial backdrop and challenges.

2.2.4 The expected level of capital expenditure has increased significantly compared to last financial year, therefore, there is a potential risk around the capacity to deliver projects of this scale.

2.3 Financial Performance – 2022-23 Total Expenditure - Projected Outturn

Appendix 2 provides a summary by capital theme of projected expenditure and income for 2023-24 showing the total reprofiled expenditure budget of £324.442m and projected spend of £304.795m in the 2023-24 financial year, £19.647m slippage across the plan. Comparable expenditure for the previous three years was £189.362m (2022-23), £163.805m (2021-22) and £138.473m (2020-21).

2.4 The level of projected expenditure is significant in comparison to previous years with an expected increase of 61% on expenditure compared to last year's outturn position.

3.0 Budgets and Funding

3.1 Budget

The Capital Investment Plan 2023-33 was approved by Fife Council in June 2023. At the end of each financial year, any budget which has not been spent is rolled forward into the next financial year as slippage. Services are asked to re-profile their project budgets considering this slippage and the result of this can be seen in the movement from the approved budget to the current budget as detailed in Appendix 2.

Since the last report, there have been further changes to the budget, these are summarised in the table below. The changes have followed agreed governance processes and have been endorsed by the Investment Strategy Group, chaired by the Head of Finance.

	Total Expenditure £m
Current Capital Investment Plan as at August 2023	304.911
CFCR/CFCR Swap	(0.014)
Increased Grant and Contribution Income	0.972
HRA mid year re-phasing	18.573
Current Capital Investment Plan as at October	324.442

The increased level of grant and contributions income, in the main, relates to Investment in Business Property Portfolio grant (£0.115m), Childcare for Inspiring School Age Childcare Spaces Programme grant (£0.215m) and St Andrews Pipeland Skatepark (£0.144m) contributions.

Since the last update was presented, the HRA Capital Investment Plan has been rephased. The overall totals for the ten year plan remain the same but this rephasing has brought forward budget for the Affordable Housing Programme into the current year by £18.573m. The spend in year for the Affordable Housing Programme will relate to units contributing to the completion of both the Phase 3 Affordable Housing Programme and the Transitional Affordable Housing Programme.

3.2 Expenditure

Variances are projected across all themes within the plan, the most significant being:

3.2.1 Opportunities for All

Education and Children's - £3.691m

The variance is mainly due to advancement of spend on the Dunfermline Learning Campus of £4.020m and the Glenmar Children's home of £0.500m, as a suitable property has been identified for this project which means a new build home is now not required. This advancement is partly offset by slippage on projects relating to Viewforth High School (£0.300m) due to ongoing discussions on the scope of the project and Raith Lodge early years provision (£0.399m) due to a delay in starting works.

Health and Social Care - £0.508m

The overspend is mainly due to the final billing for Methilhaven Care Home being higher than expected. A contributor to this was the implementing of Care Home Commissioning recommendations prior to the opening. The Care Home became operational on 19 July 2023. All elements of the Intergenerational Care village are now open.

3.2.2 Thriving Places

Business and Employability – (£0.690m)

The main reason for slippage is (£0.421m) at Inverkeithing Heritage Public Realm project due to delays from complex tenders at this site. There is other slippage of (£0.300m) at Dunfermline's city centre Gap Site development due to delays in finalising designs to minimise revenue costs.

Asset and Transportation and Environment – (£0.962m)

Strategic Transport Intervention Programme slippage (£0.975m) - delivery of schemes has been reprofiled due to a slower house build out rate by developers because of market conditions.

Area Community and Corporate Development– (£6.173m)

Community Facilities has slippage of (£0.474m) and consists of slippage of (£0.500m) for Sandy Brae Community Centre car park upgrade and (£0.250m) Kelty Community Centre car park projects being unlikely to commence during 2023-24. There is (£0.500m) slippage due to delays with Silverburn because of staffing resource problems. There is a projected overspend on Glenwood regeneration project of £0.712m, part of which is due to the value of Compulsory Purchase Orders, funding of £0.441m has been identified to mitigate the overspend.

Countryside has slippage of (£0.703m), (£0.376m) relates to the Nature Restoration fund, project bids have now been received and are being considered by the governance group. Slippage of (£0.400m) relates to delays with the River Leven restoration project due to staffing resource issues. Slippage of (£1.227m) within Sports and Golf programme for the Glenrothes Golf Depot Hub, discussions are ongoing to identify the appropriate outcome of this project and the expenditure is likely to be rephased across 2024-25 and 2025-26. Improving Health Through Leisure & Sport has slippage of (£0.865m) relating to several playpark projects across Fife, these projects are delayed aligning with the outcome of the play space strategy which is to be agreed by each area committee and the desire to involve communities to seek match funding against council and Scottish Government funding for play parks.

Area Community Facilities slippage of (£1.250m) mainly relates to the wider discussion as to the next steps for a few community assets in Lochgelly. Sport & Leisure Facilities has slippage of (£1.054m), (£0.932m) relates to Synthetic Turf pitch costs being less than anticipated alongside securing external funding. (£0.171m) is due to delays with Lochore Meadow Phase 2, the project is now progressing and expenditure will be incurred in 2024-25.

Fife Tourism Infrastructure programme slippage of (£0.251m), projects have been approved and expenditure is now being incurred. Further projects and resourcing are being identified and this funding should be fully utilised by the end of 2024-25. Area Capital funding slippage of (£0.257m). Projects are still being identified in one or two of the local areas.

3.2.3 Inclusive Growth and Jobs

Business and Employability – (£1.043m)

The main reason for slippage is delay at Fife Interchange North where a new contractor for groundworks was required and is now in place, resulting in slippage of (£0.567m). Further slippage of (£0.322m) is a result of delay at Glenrothes Flemington Road project where there had been difficulty in accessing third party premises and delayed responses to requests for information. These issues have been resolved and the project is progressing to the next stage.

There is also additional income of (£0.343m) from the proceeds of sale of Joint Venture assets which will be used to fund Joint Venture acquisitions in the next financial year. Underspend of (£0.138m) is a result of a planned acquisition which will no longer go ahead this year and funds will be redirected to the final phase of the Fife Industrial Innovation Investment Programme. The slippage and underspend are offset by £0.441m advancement in development of new business units at Levenmouth to maximise external funding available in this financial year.

3.2.4 Maintaining Our Assets – Rolling Programmes

Asset & Transportation & Environment – (£0.675m)

Climate Change Adaptation slippage (£0.610m) is primarily related to reduced delivery of Flood Alleviation Measures due to difficulties recruiting staff and employing external consultant support to assist with the recruitment gap. Staff are now in post with a view to taking projects forward during the remainder of 2023-24.

Traffic Management Programme underspend of (£0.180m) is due to planned projects delivered under budget. Arrangements are being put in place to deliver further projects to use the underspend.

Fife Resource Solutions Rolling Programme advancement £0.683m as a result of an update to guidance from SEPA regarding Wastes Containing Persistent Organic Pollutants (POPs). There was a requirement for investment at Lower Melville Wood to ensure that a facility was available to continue to process this waste type and ensure continued operations within environmental regulations.

Property Maintenance Programme (£0.407m) slippage relates primarily to very recent confirmation that planning permission has not yet been granted for Buckhaven Community Centre roof replacement project. Discussions are ongoing to agree an acceptable solution, however, the project has been delayed until next year to avoid the winter months.

Area Community and Corporate Development – (£0.437m)

Parks development projects slippage of (£1.250m) relating to several playpark projects across Fife, these projects are delayed to allow alignment with the outcome of the play space strategy which is to be agreed by each area committee and the desire to involve communities to seek match funding against council and Scottish Government funding for play parks. Plant and Machinery replacement programme slippage of (£0.372m), expenditure will not be occurring until 2024-25. Libraries, Theatres, Museums variance of £1.200m, of which, £1.000m relates to LED, Audio and Rigging projects across theatres in Fife, this will be mitigated by budget realignment and rephasing within the service and financial allocations being received including Energy Management Revolving Fund (EMRF) funding.

3.2.5 Maintaining Our Assets – Specific Projects

Asset, Transportation and Environment – (£2.089m)

Structures Infrastructure slippage of (£0.515m) relating to Woodside underpass has arisen due to resource constraints and pressures relating to infrastructure surrounding Leven Railway. In addition, resources have recently been directed towards coastal emergencies following storm Babet.

Recycling Centres (£0.750m) slippage relates to the New Recycling Centre in Cupar. This is the result of no suitable sites being identified to date, although available sites will continue to be considered going forward.

Pathway to Net Zero (£0.354m) slippage relates to preparation and lead in time for delivery of the projects, it is expected that any slippage will be spent early in 2024-25.

Landfill Sites has slippage of (£0.194m). Although progress has been made in relation to the Reception Hall at the Anaerobic Digestion Plant, the final stages cannot be completed until the final design is agreed.

3.2.6 Housing Revenue Account - £2.501m

There is an advancement of £5.500m relating to the Property Acquisition Programme. There is £16.5m available across 2023-26 which will fund 150 properties at a cost of £110k per unit. It is projected that 100 units will be purchased within 2023-24 resulting in an advancement of spend in 2023-24.

There is slippage in Non-Traditional Housing of (£1.167m) which is due to the project being delayed whilst the requirements for EESSH 2 are confirmed to ensure that works will comply with the revised standard. Major Projects has slippage of (£1.610m) which relates to several projects starting later than anticipated in year. Minor Works is also projected to have slippage of (£0.250m) based on the level of programmed work for the year.

3.2.7 Additional Investment – (£13.500m)

During the Capital Plan review process, capital budget of £13.500m was allocated for additional investment and work is being progressed to identify the requirements.

As these investments have not yet been committed, it is anticipated there will be no expenditure this year resulting in slippage of £13.500m. This will be held corporately and allocated once investment has been identified and agreed.

3.3 **Total Income**

3.3.1 Capital expenditure is funded from several income sources, some of which contribute specifically to individual projects in the plan. These income sources are Capital Financed from Current Revenue (CFCR), Scottish Government Specific Capital Grant and other grants and contributions (e.g. lottery funding).

3.3.2 Appendix 2 shows that there is a total income budget of £108.056m against a forecast of £95.600m giving a variance of £12.456m. This variance reflects a lower than planned CFCR contribution because the projected expenditure is less than originally anticipated. For the General Fund this is in relation the additional investment in paragraph 3.2.7 above.

3.3.3 The variance also includes a lower than planned contribution of CFCR from the HRA of £4.063m. Overspends and pressures within the Housing Revenue Account means that the planned level of CFCR is not feasible, further detail is presented in the revenue monitoring report on this agenda.

3.3.4 The reduction in use of CFCR is partially offset by an advancement of subsidy expected from the Scottish Government of £2.500m which relates to the advancement of the property acquisitions programme detailed in para 3.2.6. The consequences of this on the HRA is currently being considered.

3.4 **Total Funding**

Within the total funding section of Appendix 2, the other income such as General Capital Grant and Capital Receipts are not specifically related to any capital project but provide funding for the plan overall. At the time the budget for General Capital Grant was set, the Scottish Government indicated that it would provide additional grant in relation to free school meals expansion to all primary school aged children. Recent grant profiles provided by the Scottish Government indicate that this grant will not be distributed for this purpose in the current financial year leading to a reduction in expected income of £4.975m. As a result of the reduced HRA CFCR and the advancement of the property acquisitions, an increased level of HRA Borrowing may be required to fund the capital programme in year. As a result, HRA borrowing is projected to overspend by £4.038m. The consequences of this on the HRA is currently being considered.

4.0 **Prudential Indicators**

4.1 The council operates within the CIPFA Prudential Code framework. The Prudential Code is designed to support local authorities in taking their decisions in capital finance and expenditure. There is a statutory requirement to operate within the code.

4.2 As outlined in the previous Capital Investment Plan report presented to this committee, the Prudential Code requires the monitoring and reporting of performance against prudential indicators to be reported quarterly.

The introduction of quarterly monitoring facilitates increased reporting to ensure that the council continues to operate within the indicators and boundaries approved.

4.3 Appendix 3 provides details of Fife Council's Prudential Indicators as at the end of October 2023. The information includes the outturn position for the previous two years, the indicators approved within the Treasury Strategy 2023-26 and the estimates for the current and following two years based on most recent estimated expenditure and income profiles.

4.4 A detailed description of each indicator is included in the Appendix. Commentary on movements is provided below:

4.4.1 **Capital Expenditure**

This reflects the projected capital expenditure for 2023-24 along with the estimates for the next two financial years. For General Fund, expenditure is anticipated to be less than was approved in August 2023 with the difference flowing through into future years as slippage. The HRA Capital Investment Plan has been rephased since the last report and, as such, anticipated expenditure in 2023-24 has increased above the level approved in August 2023. This is in relation to the Affordable Housing Programme.

4.4.2 **Financing Costs**

These are the costs to the council of borrowing money to pay for capital projects and include principal repayment and interest charges, known as Loan Charges. The council has two types of borrowing, short term for cash flow purposes and long term for capital purposes. The council also uses its own internal balances to meet cash flow demands and interest is paid to the General Fund and the HRA from the Loans Fund for the use of this cash. As interest rates continue to rise, this can be significant. Our forecast suggests that £2.400m will be paid to the General Fund and £1.400m to the HRA. This has been included in the projections for the Financing Costs and accounts for the movement from the previous report.

4.4.3 **External Debt**

The projected external debt has increased to that previously reported to this committee and is now above the limit approved in August 2023. The cash position of the council is continually changing and, as a result, borrowing may be required to ensure that the council has sufficient funds to meet its ongoing obligations. The debt position is within the operational boundary and the authorised limits approved in the Treasury Strategy for 2023-26 and is not a cause for concern.

5.0 **Conclusions**

5.1 The current total expenditure budget for the financial year 2023-24 is £324.442m and the council is estimated to deliver £304.795m (94%) investment in the year, with slippage of £19.647m.

5.2 This level of projected expenditure represents continued progress on the delivery of a wide range of capital projects. Major capital investment by Fife Council continues, however, there is still a level of uncertainty associated with speed of delivery and future costs.

5.3 There are 30 projects/programmes within the Plan which have a value of £5.000m or greater. The overall budget for these projects is £1,185.844m, with anticipated expenditure of £1,186.193m and an estimated overspend of £0.350m (0.03%).

- 5.4 Where significant variances arise, these are reviewed by the appropriate Directorate in conjunction with the Investment Strategy Group and would be reflected in future capital plan reports to committee.
- 5.5 There is a new requirement to report quarterly on the council's Prudential Indicators and to monitor these or the course of the year. These can be seen in Appendix 3.

List of Appendices

1. Major Capital Projects total Cost Monitor
2. Monitoring Report by Capital Theme
3. Prudential Indicators

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FIFE COUNCIL
CAPITAL INVESTMENT PLAN 2023-33
TOTAL COST MONITOR - MAJOR CAPITAL PROJECTS

Appendix 1

	Service	Current Project Budget £m	Total Projected Outturn £m	Variance £m	Variance %	Current Project Status	Expected Project Completion Date
Opportunities for All							
Madras College Extension	E&CS	5.713	5.713	0.000	0.00%	Future Project	2026-27
Dunfermline Learning Campus	E&CS	122.025	123.649	1.624	1.33%	Current Project	2024-25
Extension Secondary School - Viewforth	E&CS	6.335	6.335	0.000	0.00%	Future Project	2030-31
New Secondary School - Glenrothes /Glenwood	E&CS	86.831	86.831	0.000	0.00%	Future Project	2029-30
Queen Anne High School Extension	E&CS	6.626	6.626	0.000	0.00%	Future Project	2030-31
Inverkeithing High School	E&CS	85.000	85.000	0.000	0.00%	Future Project	2026-27
Primary School Development Future Projects	E&CS	97.638	97.638	0.000	0.00%	Future Project	2032-33
Lochgelly Primary School	E&CS	9.000	9.000	0.000	0.00%	Current Project	2024-25
Methil Care Home	H&SC	8.023	8.023	0.000	0.00%	Current Project	2023-24
Cupar Care Home	H&SC	8.774	8.774	0.000	0.00%	Current Project	2025-26
Anstruther Care Home	H&SC	11.197	11.197	0.000	0.00%	Feasibility	2026-27
		447.162	448.786	1.624	0.36%		
Thriving Places							
Northern Road Link East End	ATE	12.271	12.271	0.000	0.00%	Preparatory Works	2026-27
Western Distributer Road	ATE	12.126	12.126	0.000	0.00%	Future Project	2030-31
Northern Road A823	ATE	10.335	10.335	0.000	0.00%	Preparatory Works	2030-31
Levenmouth Reconnected	ATE	8.943	8.943	0.000	0.00%	Current Project	2025-26
Abbeyview Integrated Hub	Communities	9.506	7.493	(2.013)	-21.18%	Current Project	2024-25
Templehall Community Hub	Communities	15.304	15.304	0.000	0.00%	Current Project	2027-28
Cowdenbeath LC Phase 2	Communities	7.305	7.789	0.484	6.63%	Current Project	2025-26
East Sands LC Redevelopment Project	Communities	6.000	6.000	0.000	0.00%	Future Project	2026-27
		81.791	80.262	(1.529)	-1.87%		
Inclusive Growth and Jobs							
Fife Interchange Business Units - Phase 1 & 2	Bus & Employ	11.518	11.518	0.000	0.00%	Current Project	2024-25
John Smith Business Park Business Units	Bus & Employ	5.517	5.517	0.000	0.00%	Current Project	2026-27
		17.035	17.035	0.000	0.00%		
Housing Revenue Account							
Affordable Housing	Housing	568.428	568.428	0.000	0.00%	Current Project	2025-26
		568.428	568.428	0.000	0.00%		
Maintaining Our Assets							
Glenrothes District Heat	ATE	9.449	9.449	0.000	0.00%	Current Project	2024-25
Leven Railway Bridge & Bawbee Bridge	ATE	10.150	10.150	0.000	0.00%	Current Project	2023-24
Den Burn Bridge	ATE	10.710	10.710	0.000	0.00%	Preparatory Work	2028-29
Broad Street Bridge Cowdenbeath	ATE	11.808	11.808	0.000	0.00%	Preparatory Work	2027-28
Lyne Burn	ATE	6.217	6.217	0.000	0.00%	Future Project	2029-30
Adam Smith Creative Hub	Communities	7.481	7.735	0.254	3.40%	Current Project	2023-24
Local Area Network	BTS	7.314	7.314	0.000	0.00%	Current Project	2029-30
Balwearie High School	E&CS	8.300	8.300	0.000	0.00%	Future Project	2026-27
		71.428	71.682	0.254	0.36%		
Grand Total		1,185.844	1,186.193	0.350	0.03%		

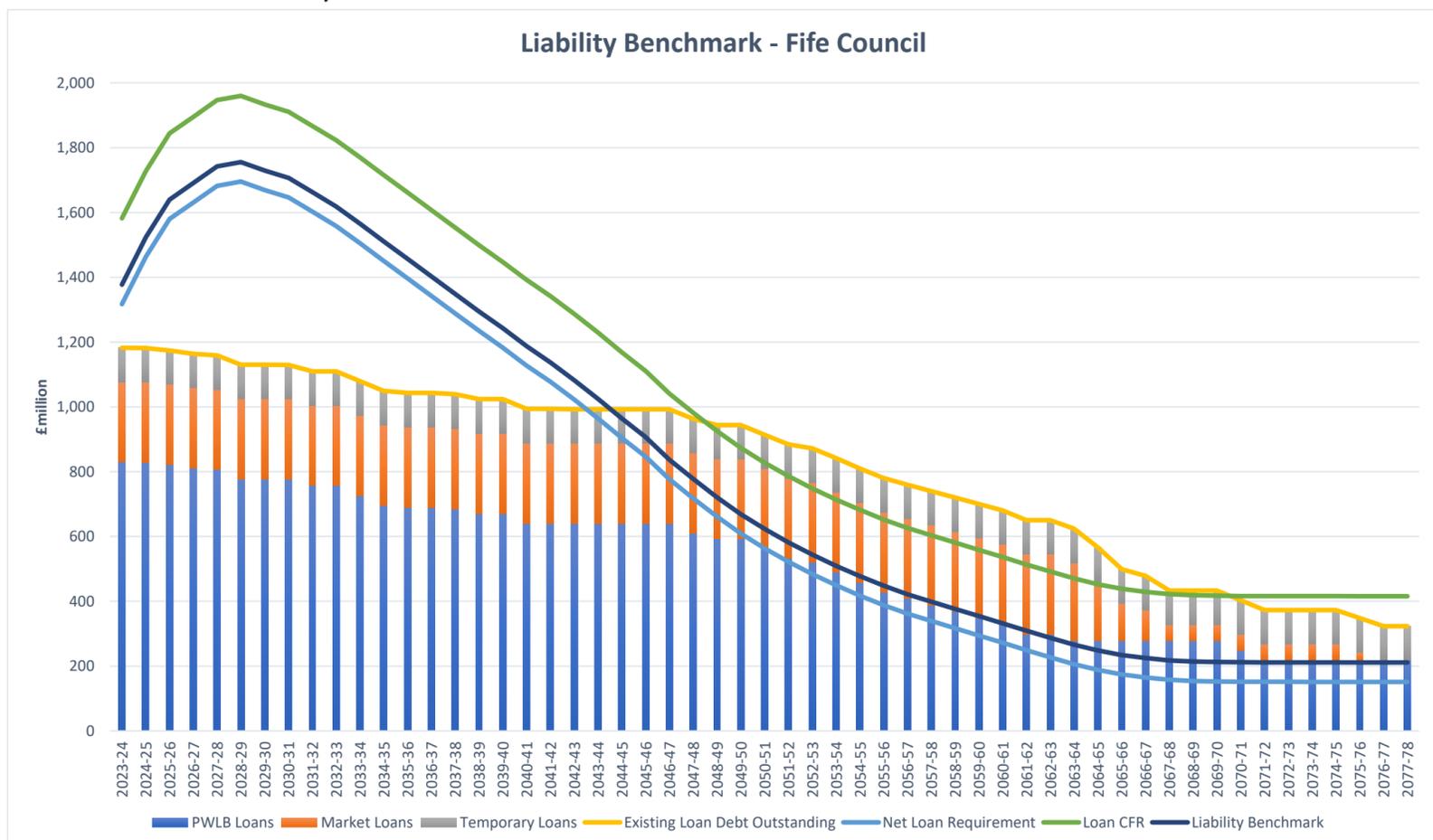
**FIFE COUNCIL
CAPITAL INVESTMENT PLAN 2023-33
MONITORING REPORT**

Appendix 2

Capital Theme	Approved Budget £m	Current Budget £m	Actual to Date £m	Projected Outturn £m	Projected Variance £m	Projected Outturn as % of Plan
Opportunities for All	85.528	64.335	43.540	68.534	4.199	107%
Thriving Places	17.896	28.453	8.275	20.629	(7.824)	73%
Inclusive Growth and Jobs	11.116	9.979	4.566	8.937	(1.043)	90%
Maintaining Our Assets - Rolling Programmes	45.657	56.646	29.177	54.584	(2.062)	96%
Maintaining Our Assets - Specific Programmes	13.387	17.649	4.223	15.731	(1.917)	89%
Housing Revenue Account	100.315	132.782	50.450	135.283	2.501	102%
Corporate Items	14.597	14.597	0.000	1.097	(13.500)	8%
TOTAL EXPENDITURE	288.496	324.442	140.231	304.795	(19.647)	94%
Scottish Government Specific Capital Grants	(3.856)	(4.893)	(4.141)	(7.357)	(2.464)	150%
Other Grants and Contributions	(46.863)	(46.796)	(23.847)	(43.847)	2.949	94%
Capital Financed from Current Revenue (CFCR)	(61.426)	(56.367)	(13.839)	(44.396)	11.971	79%
TOTAL INCOME	(112.144)	(108.056)	(41.827)	(95.600)	12.456	88%
TOTAL NET EXPENDITURE	176.352	216.386	98.404	209.195	(7.191)	97%
Scottish Government General Capital Grant	(40.776)	(42.195)	(21.740)	(37.220)	4.975	88%
Capital Receipts	(5.024)	(4.023)	(0.944)	(4.564)	(0.540)	113%
NHT Loan Repayments	0.000	0.000	0.000	0.000	0.000	0%
Borrowing from Loans Fund - General Fund	(96.140)	(97.046)	0.000	(90.252)	6.794	93%
Borrowing from Loans Fund - HRA	(34.412)	(73.121)	0.000	(77.159)	(4.038)	106%
TOTAL FUNDING	(176.352)	(216.385)	(22.684)	(209.195)	7.190	97%

OUTTURN 2021-22	OUTTURN 2022-23		APPROVED 2023-24	APPROVED 2024-25	APPROVED 2025-26	PROJECTION 2023-24	ESTIMATE 2024-25	ESTIMATE 2025-26
		Affordability Indicators						
		<u>Capital Expenditure</u>						
£m	£m	General Fund	£m	£m	£m	£m	£m	£m
89.911	103.964		188.181	165.299	161.684	169.512	172.080	163.718
73.894	85.399	Housing Revenue Account	114.210	142.251	173.348	135.283	143.228	110.103
163.805	189.362		302.391	307.550	335.032	304.795	315.308	273.822
		<u>Financing Costs</u>						
£m	£m	General Fund	£m	£m	£m	£m	£m	£m
58.349	11.996		52.811	55.615	56.711	50.261	55.690	57.263
27.464	30.519	Housing Revenue Account	32.964	37.918	43.651	31.954	39.676	45.287
85.813	42.515		85.776	93.532	100.363	82.215	95.366	102.551
		<u>Net Revenue Stream</u>						
£m	£m	General Fund	£m	£m	£m	£m	£m	£m
913.590	942.946		941.085	941.085	941.085	962.053	941.085	941.085
124.608	128.401	Housing Revenue Account	135.195	140.107	145.904	135.708	140.107	145.904
1,038.198	1,071.347		1,076.280	1,081.192	1,086.989	1,097.761	1,081.192	1,086.989
		<u>Ratio of Financing Costs to Net Revenue Stream</u>						
6.39%	1.27%	General Fund	5.61%	5.91%	6.03%	5.22%	5.92%	6.08%
22.04%	23.77%	Housing Revenue Account	24.38%	27.06%	29.92%	23.55%	28.32%	31.04%
		<u>The Capital Financing Requirement</u>						
£m	£m	General Fund	£m	£m	£m	£m	£m	£m
746.223	785.892		862.624	937.809	1,012.532	852.461	950.503	1,046.496
386.898	414.161	Housing Revenue Account	456.246	526.721	617.846	472.782	547.678	595.035
1,133.121	1,200.053		1,318.870	1,464.530	1,630.378	1,325.243	1,498.181	1,641.531
		External Debt	1,138.657	1,237.520	1,355.902	1,153.956	1,254.820	1,338.202
1,022.655	995.595	Authorised Limit for Total External Debt	1,528.856	1,628.414	1,765.606	1,528.856	1,628.414	1,765.606
1,451.766	1,489.036	Operational Boundary for Total External Debt	1,456.053	1,550.870	1,681.530	1,456.053	1,550.870	1,681.530
1,382.634	1,418.129							
		Prudence Indicators						
		<u>External Debt and the Capital Financing Requirement</u>						
£m	£m	Forecast External Debt	£m	£m	£m	£m	£m	£m
1,022.655	995.595		1,138.657	1,237.520	1,355.902	1,153.956	1,254.820	1,338.202
1,133.121	1,200.053	Forecast Capital Financing Requirement	1,318.870	1,464.530	1,630.378	1,325.243	1,498.181	1,641.531
(110.467)	(204.458)		(180.213)	(227.009)	(274.476)	(171.286)	(243.361)	(303.330)
		<u>Adoption of the CIPFA Code on Treasury Management</u>						
		Code adopted in 1996 and compliance maintained through the Treasury Management Strategy						
100%	100%	Fixed Interest Rate Exposure Upper Limit	100%	100%	100%	100%	100%	100%
75%	75%	Variable Interest Rate Exposure Upper Limit	75%	75%	75%	75%	75%	75%
0%	0%	Total Principal Sums Invested Beyond 364 days Upper Limit	0%	0%	0%	0%	0%	0%

Debt Liability Benchmark



11 January 2024
Agenda Item No. 6

Local Taxation - Revision to Charging

Report by: Les Robertson, Head of Revenue and Commercial Services and
Diarmuid Cotter, Head of Customer and Online Services

Wards Affected: All

Purpose

This report updates Fife Council's Empty Rates Charging Policy previously agreed at Cabinet Committee in January 2023.

The report also includes a proposal to use powers to increase charges within council tax from 100% to 200% for all dwellings classified as Second Homes.

Recommendations

Members are requested to:

- (1) approve the proposed Empty Rates Charging Policy effective from 1 April 2024 (as detailed in Appendix 1 to this report);
- (2) approve Fife Council to levy an additional 100% Council Tax charge on all dwellings identified as second homes; and
- (3) Note the revised policy gives officers' discretion not to charge the Second Homes additional charge in exceptional circumstances (as currently operating for long-term empty charging).

Resource Implications

For the revision of the empty rates policy, an additional resource of 1 FTE at FC5 was approved by Cabinet Committee in January 2023 and this post will continue.

There is currently a windfall due to the funding received for Empty Rates Relief of £0.914m. This will reduce over time due to changes in the rate poundage.

Fife Council will raise net income of approximately £1.08m through changes to the Empty Rates Relief Policy.

Additional income for Second Homes Council Tax is estimated to be £3.916m reducing to £1.958m over 4 years.

Additional estimated revenue costs of £0.100m will be incurred for the administration of charging additional Council Tax on Second Homes. This will be funded from the additional income raised.

Legal & Risk Implications

As detailed in the agreed COSLA (Convention of Scottish Local Authorities) Leader's report, there is an inherent risk to Fife Council should the number of empty dwellings exceed the funding received. To mitigate this risk, we have an agreement that where this happens and a 3% threshold above funding is reached, LAs can approach the Scottish Government for a redetermination of funding.

On charging second homes, the Regulations have been laid in the Scottish Parliament but are still to be formally approved. Any such charging can only be implemented when the regulations are approved by the Parliament. The risk is the regulations are not agreed in time for annual billing of council tax in 2024/25.

Impact Assessment

An Equality Impact Assessment (EqIA) is not required as there are no changes to existing service delivery merely changing the charging regime.

Consultation

The empty rates policy has been consulted internally and every owner where charging is proposed have been communicated with during 2022/23 as part of the empty period review process.

The Scottish Government conducted a public consultation into the proposal to allow additional charging Council Tax on Second Homes.

1.0 Background – Empty Rates Charging Policy

Policy Intention

- 1.1 The empty rates policy aims to strike a fair balance between giving relief to empty rateable subjects and updating those types of subjects currently exempt from empty rates charges and removes two categories of subjects that currently receive unlimited time exemptions. The full empty rates relief policy document is attached as Appendix 1 to this report.
- 1.2 The relief proposed continues to encourage owners of empty rateable subjects to find occupiers or bring back into use such premises. Within the policy there is discretion not to impose an empty rate charge where there are exceptional circumstances (akin to certain acts of God) such as flooding, fire, etc. and thus would result in the rateable subject not being available for occupation. In addition, where the owners satisfy the council that they are actively working to bring the subject back into use, discretion to continue the relief for a further six months may be considered at the discretion of officers of the council named in the policy.

2.0 Empty Relief Amendments to current policy

- 2.1 The new empty rates relief policy will align industrial and non-industrial relief to three months full relief followed by 10% relief until the rateable subject is occupied. Short periods of occupation of less than six months will be disregarded when assessing empty rates relief.
- 2.2 The existing policy allowed certain without time limited exemptions from empty rates charges. The revised policy will cease this exemption for two classes of subjects as detailed in the full policy. The two subjects where exemption will cease (from 1 July 2024) are:
 - a) Listed Buildings; and
 - b) Empty Land

2.3 Exemption from empty rates charges will continue without limit of time for the following unoccupied subjects: -

- Where the subject has a Rateable Value £1700
- Where the subject's liability falls to be made by a trustee in sequestration, liquidation, or executor of an estate
- Where the subject's occupation is prohibited by law
- Where the subject is under a compulsory purchase order
- Where the owner of a subject is in administration (or subject to an administration order)
- Where the owner of the subject is a company or partnership that is formally being wound up
- Where the subject is Shooting rights, and these are not being utilised by the owners of the land

2.4 Fife Council, in the last financial year 2022-23, awarded the following in terms of empty relief:

Table 1 – Current Award of Empty Relief.

Type of Relief	Number of Awards	Value of Relief Awarded
100% Industrial	15	£ 229,889
10% Industrial	108	£ 109,377
50% Other	19	£ 109,132
10% Other	367	£ 219,953
Listed Buildings	174	£ 1,333,558
Land – No buildings	195	£ 1,438,270
Shooting Rights	340	£ 127,239
Small RV £1700	292	£ 126,943
Trustee	4	£ 6,097
Prohibited by Law	4	£ 1,787
Compulsory Purchase	Nil	£0
Administration	42	£ 845,507
Company Wound Up*	Nil	£0
Total		£ 4,547,752**

*Not used in Fife as Liability always reverts liability to proprietor.

** these figures are as at 01-12-23 and liable to increase for new empty dwellings in Q4 2023/24.

Funding

- 2.5 The Scottish Government has provided three years funding (fixed for the three years) and Fife Council's share of the funding (less approved costs) is £ 5.462 million.

Cost

- 2.6 The overall cost of providing the relief is less than the funding (£0.914m), but this does not include changes in the rate poundage (which is likely to increase) and is also reliant on the number of empty subjects not increasing over time.

Effect of Changes in the policy

- 2.7 Changes in increasing the level of relief to 100% for three months exemption for all subjects will have an overall cost amounting to £120,000.

Changes to remove exemptions will raise around £2.7 million, however, this is caveated with the following: -

Fife Council has empty subjects and will incur additional cost estimated at around £500,000 which will need to be offset against additional revenue.

Changes in owner's behaviour, i.e. by seeking occupation (thus being entitled to an additional six-month exemption) or not paying the charge, thus increasing bad debt, will reduce the revenue generated by an estimated £1 million.

Thus, the total estimated benefit of the policy (excluding the £0.914 million as detailed in paragraph 2.6) is estimated at £ 1.08 million as summarised below: -

Table 2 – Summary of estimated benefit from empty rates policy

Effect of Changes in the Policy	£m
Income	
Remove exemptions	2.700
Less:-	
Expenditure	
Increase the level of relief to 100% for three months exemption for all subjects	(0.120)
Fife Council has empty subjects and will incur additional costs	(0.500)
Changes in owner's behaviour i.e. by seeking occupation (thus being entitled to an additional 6-month exemption) or not paying the charge, thus increasing bad debt	(1.000)
	(1.620)
Net Income	1.080

3.0 Council Tax – Second Homes

- 3.1 The second part of this report requests members to approve charging owners of second homes an additional premium of 100% on council tax.
- 3.2 The definition of a second home within the council tax system is any dwelling which is no persons sole or main residence that is occupied for at least 25 days in any rolling year. The typical second home is where the owner has their main residence elsewhere but retains a dwelling in Fife for use for various reasons (most are used as a holiday home).
- 3.3 The current number of dwellings in Fife currently classed as Second Homes is as follows:-

Table 3 – Breakdown of Second Homes in Fife

<u>Area</u>	Council Tax Band								Total
	A	B	C	D	E	F	G	H	
Central	72	56	35	24	20	8	3	2	220
East	103	180	333	374	430	262	223	37	1942
West	20	90	29	29	31	17	10	3	229
Fife	195	326	397	427	481	287	236	42	2391

- 3.4 Rationale for increasing charges is twofold:
- To increase general fund revenue to assist with the funding of key service delivery (see later - financial implications).
 - Increase local tax paid by owners of Second Homes akin to the current charging of long-term empty dwellings as these properties are not available in either the sales or letting markets in Fife thus limiting the supply of housing available in the Fife area.

Financial Implications

- 3.5 The gross (current maximum) amount that could be raised is contained in the following table:

Table 4 – Gross Council Tax

Band	Council Tax Charge	Number of Second Homes	Gross Raised
A	£923.45	195	£180,073
B	£1077.36	326	£351,219
C	£1231.27	397	£488,814
D	£1385.18	427	£591,472
E	£1819.97	481	£875,406

Band	Council Tax Charge	Number of Second Homes	Gross Raised
F	£2250.92	287	£646,014
G	£2712.64	236	£640,183
H	£3393.69	42	£142,535
Total			£3,915,716

3.6 However, this gross amount will inevitably reduce (as we experienced when additional charging was introduced for long-term empty dwellings) as owners change behaviours and potentially use of the second homes. Estimated reduction in income over the years as follows: -

Year 1 – 25% reduction in initial charges

Year 2 – 30% reduction in initial charges

Year 3 – 40% reduction in initial charges

Year 4 onwards – 50% reduction in initial charges.

3.7 The overall cost to administer the second homes charging is estimated in the region of £100,000 per annum to cover the following costs:

- a) additional/enhanced software to provide information to support the charging and police the second homes charge to ensure that when the Council is informed that a dwelling is now occupied (to avoid the charge) that the dwelling is being occupied (to avoid fraud).
- b) To employ additional Revenue Officer to administer and ensure compliance through visiting second homes to ensure such dwellings are being occupied.
- c) To deal with a large volume of expected appeals which will be heard by the First Tier Tribunal (Local Taxation Chamber)
- d) To boost empty homes advice for owners of second homes.

3.8 Members are also asked to approve discretion not to charge the premium where circumstances would appear to officers that imposing the 100% additional charge is not appropriate. Examples where charging would not be appropriate would include the following:

- a) Job related dwellings – where a second home is required by the liable person for work purposes.
- b) Where a second home is required for reasons where charging would not be appropriate, for example where the liable person has caring responsibility for elderly or disabled relatives.
- c) Any other wholly exceptional circumstance which would be dealt with on a case-by-case basis.

4.0 Conclusions

- 4.1 The Scottish Government have remitted the charging and relief of empty rates to local authorities. The proposed policy for charging empty rates aims to strike a balance between giving a fair amount of relief to owners of empty rateable subjects whilst taking steps to encourage owners to bring these empty subjects back into use.
- 4.2 Charging owners of second homes an additional premium received general support in the public consultation and has the potential to raise additional revenue to pay for local services.
- 4.3 The charging of a premium for second homes brings these dwellings in line with the charging of long-term empty dwellings. The aim of the charging is to either have owners of second homes to pay an additional levy to support local service provision or to encourage them to change the use of their second homes thus increasing the availability of much needed housing in the Fife area.
- 4.4 Within both policies, members are asked to agree that officers do have the discretion not to impose additional charges as detailed in this report.
- 4.5 Both changes require additional resources to implement (the empty rates resource was approved in January 2023 by Cabinet Committee), and these are required to ensure efficient administration and to ensure that evasion of the charges is minimised.

List of Appendices

1. Empty Property Relief Policy

Report Contact

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Fife Council

Empty Property Relief Policy

Effective Date

This policy will become effective from 1 April 2024.

Legislative Background

The policy is required to be put in place to allow relief to Non-Domestic Rates for Empty Rateable Subjects. Section 19 to the Non-Domestic Rates Act (Scotland) 2020 repeals the existing provisions for award of relief (Section 24 to the Local Government (Scotland) Act 1966).

This policy is introduced in terms of Section 3A to the Local Government (Financial Provisions etc) (Scotland) Act 1962 as amended by Section 140 to the Community Empowerment (Scotland) Act 2015.

Section 3A States:

“Schemes for reduction and remission of rates

- (1) This section applies in relation to rates leviable for the year 2015-16 and any subsequent year.
- (2) A rating authority may, in accordance with a scheme made by it for the purposes of this section, reduce or remit any rate leviable by it in respect of lands and heritages.
- (3) Any reduction or remission under subsection (2) ceases to have effect at such time as may be determined by the rating authority.
- (4) A scheme under subsection (2) may make provision for the rate to be reduced or remitted by reference to—
 - (a) such categories of lands and heritages as may be specified in the scheme,
 - (b) such areas as may be so specified,
 - (c) such activities as may be so specified,
 - (d) such other matters as may be so specified.
- (5) Any reduction or remission under subsection (2) ceases to have effect on a change in the occupation of the lands and heritages in respect of which it was granted.
- (6) Before exercising the power conferred by subsection (2), or amending a scheme made under that subsection, the rating authority must have regard to the authority’s expenditure and income and the interests of persons liable to pay council tax set by the authority.”

This policy will apply from 1 April 2024 to 31 March 2026 and continue thereafter should the Scottish Government review continue to devolve empty rates to Local Authority control.

Empty Rates Policy Definitions and Content

Definition

Empty properties are defined as those rateable subjects on the Valuation Roll which are not currently occupied. Part Occupied properties are not included in this policy as they are covered by Section 24A to the Local Government (Scotland) Act 1966.

Empty Relief to be awarded – Time Limited

- a) Industrial Properties (with the same definition as was contained previously in the Local Government (Scotland) Act 1966) will receive 100% relief for 3 months from the last date of occupation and 10% relief thereafter.
- b) All other properties (non-industrial) will receive 100% rates relief for the first 3 months from the last occupation date and 10% relief thereafter (this includes all subjects listed in (d) below which were previously exempt from charging).
- c) Short periods of occupation of 6 months or less will be ignored when assessing last occupation date for (a) & (b) above and (d) below.
- d) From 30 June 2024 Fife Council will remove without limit of time exemptions previously awarded to the following categories of rateable subjects and this will be replaced with 10% relief from 1 July 2024:

Unoccupied subjects where current without limit of time exemption that will end on 30th June 2024 are as follows:

1) **Listed Buildings or subject to preservation order.**

The rateable subjects are:

- a) Are subject of a building preservation notice/s as defined by Section 56 of the town and Country Planning (Scotland) act 1972 (a) or included in a list compiled under Section a of that Act; or
- b) Included in the Schedule of Monuments compiled under Section 11 of the Ancient Monuments and Archaeological Areas Act; or
- c) Industrial lands and heritages.

2) **Properties that do not comprise any building or part-building.**

- a) Property not comprising one or more buildings or a part of a building which includes all descriptions of Land (except shooting rights which have not been utilised see (6) below), Yards etc.

100% Relief awarded – without limit of time (Numbers 1 to 6 below)

The following types of properties/owners/rateable occupiers will continue to receive 100% rates relief for an indefinite time on unoccupied properties as follows:

- 1) Properties with a rateable value is less than £1700.
- 2) Properties where the rateable occupier is a trustee for sequestration, liquidation, or an executor.

The person entitled to possession of the lands and heritages is so entitled by virtue only of being: -

- a. The trustee under a trust deed for creditors; or
- b. The trustee under an award of sequestration; or
- c. The executor of the estate of a deceased person.

3) Properties where the rateable occupier is a company that has been wound up under the Insolvency Act.

- a) The person entitled to possession of the lands and heritages is so entitled in his capacity as liquidator by virtue of an order made under Section 112 or Section 145 of the Insolvency Act 1986 (d); or
- b) The owner of the lands and heritages is a company which is subject to a winding-up order made under the Insolvency Act 1986, or which is being wound up voluntarily under that Act.

4) Properties where occupation is prohibited by law.

The owner of the lands and heritages are prohibited by law from occupying them or allowing them to be occupied.

5) Properties which are subject to a compulsory purchase order.

The lands and heritages are kept vacant by reason of action taken by or on behalf of the Crown or any local or public authority with a view to prohibiting the occupation of the lands and heritages or to acquiring them.

6) Land that has Shooting Rights which have not been utilised by the owner.

Awarding Relief to unoccupied properties

Fife Council will transfer existing empty reliefs and exemptions existing on 31st March 2024 awarded to empty properties except where owners have not responded to empty period review forms and the relief in this circumstance will be ended on 31/03/24.

Where time limited reliefs are in place as of 31st March 2024 Fife Council will continue to award the relief, but each premises will only receive the balance of relief based on the overall maximum period of 3 months followed by 10% relief.

For new reliefs, the rateable occupier (or others who are held liable) will need to make application to Fife Council for the relief to be applied. Application forms and advice are available from Fife Council. Relief must be applied for in a timeous manner and will only be backdated where there are reasonable grounds to do so. Any backdating will be limited to the current and previous financial year from the date of application. Rate payers will be required as part of the application process to supply sufficient information and evidence as requested by the Council.

Discretion not to Charge empty Rates.

Empty rates will not be charged in exceptional circumstances and/or where the owner is taking reasonable steps to bring the property back into use (it is expected, but not absolutely required, that such applications would also be supported by Economic Development). Non-Charging is at the sole discretion of the Head of Revenues and Commercial Services or other nominated officer of Fife Council such as the appropriate Revenues Manager. In such cases relief may be extended for up to 12 months.

Subsidy Control

As this policy applies to all lands and heritages within Fife and is open to all landlords regardless of business classification, the policy is deemed as an open policy and advice received is that this relief will not be considered under the Subsidy Control regime.

11 January 2024
Agenda Item No. 7

Climate Fife 2024 – Strategy and Action Plan

Report by: Pam Ewen, Head of Planning Services

Wards Affected: All

Purpose

The purpose of this report is to seek approval of the Climate Fife 2024 – Strategy and Action Plan.

Recommendation(s)

It is recommended that the Committee approve Climate Fife 2024 (Appendix 1).

Resource Implications

The Strategy and Action Plan has been developed in collaboration across Fife Council Services. This is based on current staff resource and within existing budgets. Addressing the climate emergency will require further long-term investment and the “Big Moves” outlined in the strategy will shape this, developing further business cases for consideration by Fife Council, as well as working with the Scottish Government to identify funding support to deliver climate action.

Legal & Risk Implications

Climate Fife 2024 will contribute directly to meeting our duties under the Climate Change (Scotland) Act 2009.

It also is a key measure in managing our climate risk with Fife Council’s Strategic Risk Register which is reviewed and updated annually.

Impact Assessment

A Strategic Environmental Assessment (SEA) was undertaken on the Climate Fife Strategy in 2020, as such a SEA and Fife Environmental Assessment Tool (FEAT) is not required.

An Equalities Impact Assessment was completed for the Climate Fife Strategy in 2020.

Consultation

The Action Plan was developed in collaboration with the following Services:

- Business and Employability
- Communities and Corporate Development
- Environment & Building Services
- Finance
- Housing Services
- Property Services
- Roads & Transportation Services

A number of external partners were also included in the development, including members of the Addressing the Climate Emergency Board, the Fife Environmental Partnership and the Fife Communities Climate Action Network (FCCAN).

1.0 Background

Climate Change legal duty

- 1.1 The Climate Change (Scotland) Act requires that Fife Council must, in exercising its functions, act—
- a) in the way best calculated to contribute to the delivery of the carbon emissions reduction targets.
 - b) in the way best calculated to help deliver the national climate change adaptation programme.
 - c) in a way that it considers is most sustainable.

Climate Fife

- 1.2 In 2019, Fife Council declared a Climate Emergency committing to the target of net-zero by 2045. This was closely followed by “Climate Fife” our strategy outlining how will meet our legal duties, tackle the climate emergency over the long-term and with a vision that by 2045 Fife will be:
- **Climate Friendly**, having transformed the economy, infrastructure, land use and energy system to decarbonise how we live;
 - **Climate Ready**, with plans and projects to increase the resilience of Fife communities and the economy to help minimise the impacts from unavoidable climate change; and
 - **Climate Just**, ensuring that all Fifers and the Fife environment can benefit from this transition.

Refreshing the approach

- 1.3 The week “Climate Fife” was launched, the country entered the first lockdown of the Covid-19 pandemic and, over the next two years, this significantly impacted both Fife Council’s priorities for action and how it delivers services to communities.
- 1.4 Changes in priorities were reflected in the revised Plan4Fife (2021-24) where ‘Addressing the Climate Emergency’ was identified as one of the three key priorities for recovery and renewal, supported by an overarching approach of Community Wealth Building.
- 1.5 In addition to the “recovery and renewal” agenda in the Plan4Fife, there’s been a recognised need to increase both the pace and scale of action in Fife to address the climate emergency.
- 1.6 The scientific evidence means globally we are on course to reach 1.5 °C of warming within the next two decades. Limiting it to 1.5°C is still within reach, but only with urgent transformational change. The UK’s own Climate Change Committee also emphasised the need for urgency and for the UK to retake a leadership role internationally.
- 1.7 At a national policy level, there have also been significant changes, notably the update of the Scottish Government’s Climate Change Plan (2020) and publication of their Environmental Strategy (2020). Both highlighted the recovery from the pandemic needs to respond to the climate emergency, putting us on a pathway to deliver emission reduction through a just transition to net zero. To support this addition, new legislation requires Local Authorities to produce a Local Heat & Energy Efficiency Strategy (LHEES). Fife’s LHEES was approved on November 30th at Cabinet Committee.

- 1.8 To meet these challenges, a refreshed Climate Fife Strategy and Action Plan has been developed for approval by Cabinet.

2.0 Issues and Options

- 2.1 The Climate Fife 2024 (Appendix 1) comprises three “Big Moves”, key transformations that we need to make, including where we need to agree or change policy, develop new delivery models and a place-based approach. They are:
- Energy
 - Resilience
 - Community
- 2.2 Climate Fife also includes an Action Plan outlining our ongoing and continued actions over the coming four years across six themes:
- Buildings
 - Low Carbon Energy
 - Zero Waste
 - Transport and Travel
 - Nature and Land
 - Protecting and Supporting our Communities
- 2.3 Each of these themes has a number of actions outlining what Fife Council is committed to delivering over the next four years. All the actions have been agreed by Services and reflect our current commitments and agreed budgets. Some key actions include: Building of Dunfermline Learning Campus to become the largest Passivhaus standard building in Europe; Building 750 new affordable houses per annum to the Silver Plus Standard; Being an active partner in SGN's H100 Project in Leven; Developing Re-Use Hubs to reduce waste; Creation of seven Biodiversity Neighbourhoods across Fife; and providing a 'Property Flood Resilience' grant to support home improvements for the protection against flooding.
- 2.4 The actions in themselves provide an excellent basis for meeting the challenge but it's recognised that more needs done to increase pace and scale of action in the future. As such, each theme includes a “Looking to the future” section, providing a direction of travel, notes initiatives in development and highlights where partnership working in critical to delivery.
- 2.5 Climate Fife 2024 provides an overview of climate action for Fife Council. However, it should be noted that wider action will be taken across all areas of Fife Council, including delivery through other strategies. Page 25 (Appendix 1) of the Strategy includes the links to wider Fife Council strategic delivery.
- 2.6 Progress against this Strategy and Action Plan will be measured through a suit of metrics for each theme (Measuring our success) and monitored by the Addressing the Climate Emergency Board. Results will be reported as part of the annual 'Climate Change Public Bodies Duties Report' [See Item 7, November 3rd Cabinet Committee for context]. This will also provide an opportunity to recommend updates to the Action Plan with new actions as required. Fife Council is also working on the new Climate Intelligence Service which is creating a national framework for climate change plans for local government.

3.0 Conclusions

- 3.1 Climate Fife 2024 provides a revised, refreshed and focussed plan on what Fife Council will deliver to address the climate emergency. This offers an opportunity to look to the future at what we can scale-up, going further and faster and to build on our achievements so far.
- 3.2 The strategy will continue to be monitored by the Addressing the Climate Emergency Board which will also develop recommendations for future partnership action for the Fife Partnership.

List of Appendices

1. Climate Fife 2024

Background Papers

The following papers were relied on in the preparation of this report:

- [Climate Change \(Scotland\) Act](#)

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Climate Fife

2024

Strategy and Action Plan

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Foreword

I am pleased to introduce Fife Council's "Climate Fife 2024". Much has changed since Fife Council declared a Climate Emergency in 2019, and this plan reflects the Fife Council adaptive approach to our changing climate, outlining the action we are committed to taking over the next 4 years.

Fife Council has made some significant progress over the years, we have almost halved our carbon footprint since 2015. But the scale of the challenge is enormous and there is still much work to do to meet our target. And while we have reduced Fife Council's carbon footprint, this only represents a small percentage of Fife's total. Through our policies, projects and service delivery Fife Council can also influence, support and lead all of Fife to tackle the emergency.

Fife Council cannot do this alone. Only by working together can we tackle both our impact on the climate and the changing climate's impact on us. Our partnerships with other public sector organisations, local businesses and our communities is crucial, and Fife Council commits to working with everyone in Fife to meet our ambitions.

We also need support from national government. We welcome the recent Partnership Agreement between the Convention of Scottish Local Authorities (COSLA) and the Scottish Government, setting out a more collaborative approach to delivering our shared priorities. But it is clear additional government funding, new national policies, and wider support and guidance is needed to deliver these priorities in Fife.

Taking action to address the Climate Emergency is not just about the planet, our actions in this plan play a significant role in tackling the nature emergency, making the most of opportunities for a greener economy, and support people during the cost-of-living crisis. Energy efficient homes, local food and low carbon public transport can all contribute to keeping household bills low and support healthy living.

I look forward to working together with everyone across Fife, embracing the opportunities climate action can bring, and taking Fife into a future that is climate ready, climate friendly, and climate just.



Cllr. Jan Wincott

Spokesperson - Environment & Climate Change

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Introduction

In 2019 Fife Council declared a Climate Emergency, committing to the target of net-zero by 2045. This was closely followed by “Climate Fife” our Sustainable Energy and Climate Action Plan (2020-2030), outlining our ambition and actions to tackle the climate emergency over the long term.

Since then, much has changed. The week “Climate Fife” was launched the country entered the first lockdown of the Covid-19 pandemic, and over the next 2 years this significantly impacted both our priorities for action and how we deliver services to our communities. This change in priorities was reflected in the revised Plan4Fife (2021-24) where ‘Addressing the Climate Emergency’ was identified as one of the three key priorities for recovery and renewal, supported by an overarching approach of Community Wealth Building.

At a national policy level there have also been significant changes, notably the update of the Scottish Government’s Climate Change Plan (2020) and publication of their Environmental Strategy (2020). Both highlighted the recovery from the pandemic needs to respond to the climate emergency, putting us on a pathway to deliver emission reduction through a just transition to net zero.

More widely during this period, scientific evidence provided more impetus to deliver real change. The Intergovernmental Panel on Climate Change (IPCC) reported that insufficient pace and scale of action means globally we are on course to reach 1.5 °C of warming within the next two decades¹. Noting that limiting it to 1.5 °C is still within reach, but only with urgent transformational change. The UK’s own Climate Change Committee also emphasised the need for urgency, and for the UK to retake a leadership role internationally.

“Climate Fife 2024” provides a revised, refreshed, and focussed strategy on what Fife Council will deliver over the next 4 years. This offers an opportunity to look to the future at what we can scale-up, going further and faster, and to build on our achievements so far.

¹ IPCC, 2023: Summary for Policymakers. In: Climate Change 2023: Synthesis Report. Contribution of Working Groups I, II and III to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change https://www.ipcc.ch/report/ar6/syr/downloads/report/IPCC_AR6_SYR_SPM.pdf

Our Strategy

The **Vision for Climate Fife** remains the same. By 2045 Fife will be:

- **Climate Friendly**, having transformed the economy, infrastructure, land use and energy system to decarbonise how we live;
- **Climate Ready**, with plans and projects to increase the resilience of Fife communities and the economy to help minimise the impacts from unavoidable climate change; and
- **Climate Just**, ensuring that all Fifers and the Fife environment can benefit from this transition.

To achieve this vision we need to continue to deliver reductions and efficiencies, but recognise the need to transform how we do things to facilitate increased pace and scale.

Our strategy addresses this through 3 “Big Moves” which will transform how we will do things, and an Action Plan outlining our ongoing and continued actions over the coming four years.

Big Moves

These are key transformations that we need to make over the period of the strategy. Including where we need to agree or change policy, develop new delivery models, and adopt a place-based approach.

The three Big Moves are:

- Energy – where we will begin to transform the energy system in Fife to low carbon.
- Resilience – where we will transform how we protect Fife from the unavoidable impacts of climate change and biodiversity loss, including through nature-based solutions.
- Community – where we will transform our approach to supporting community climate action, empowering our communities to transform local food, waste, transport, and energy generation systems to create community wealth and wellbeing.

Action Plan Programme

Covering six themes, this programme outlines actions we are committed to delivering over the next 4 years. The themes describe which actions are ongoing, and which are part of our “Big Moves”, how progress will be measured, and a section looking to future challenges we need to respond to.

The Action Plan Programme Themes are:

- Buildings
- Low Carbon Energy
- Zero Waste
- Transport and Travel
- Nature and Land
- Protecting and Supporting our Communities

Target Progress and Monitoring

Climate Fife commits us to both Fife and Fife Council becoming net zero by 2045. Since our baseline year, Fife Council's carbon footprint has reduced by 46% (to 2022/23). The recent trajectory indicates that we need to do more in the short term on gas use and transportation to meet this target.

Figure 1 Fife Council Carbon Footprint Graph

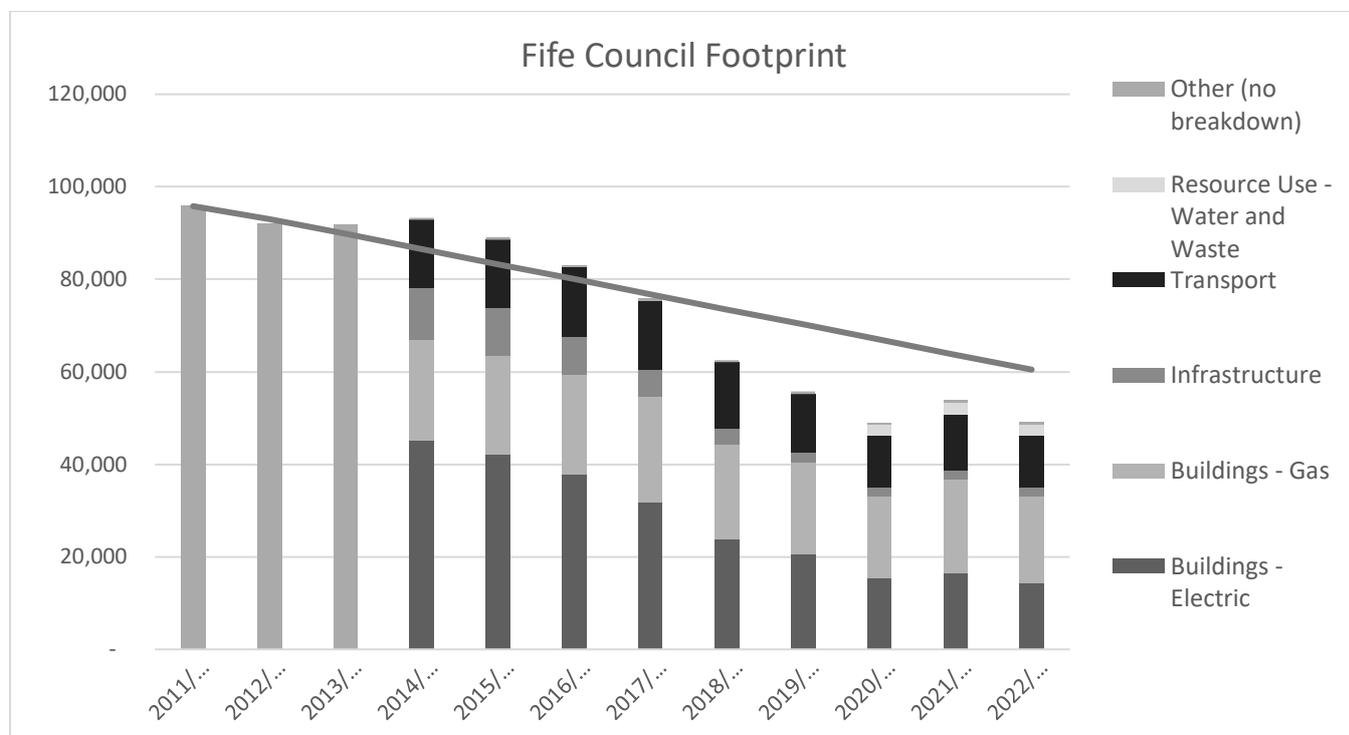


Table 1 Fife Council Carbon Footprint

Section	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Buildings - Electric	-	-	-	45,088	42,087	37,990	31,959	23,889	20,737	15,421	16,497	14,402
Buildings - Gas	-	-	-	21,757	21,432	21,385	22,698	20,325	19,756	17,668	20,337	18,650
Infrastructure	-	-	-	11,293	10,168	8,352	5,820	3,683	2,157	1,968	1,928	1,855
Transport	-	-	-	14,651	14,855	15,032	14,806	14,182	12,607	11,189	11,927	11,426
Resource Use - Water and Waste	-	-	-	-	-	-	-	-	-	2,450	2,578	2,363
Other (no breakdown)	95,805	92,124	91,893	490	563	331	531	405	510	247	442	410
Total	95,805	92,124	91,893	93,280	89,105	83,089	75,813	62,484	55,768	48,943	53,709	49,106
Target	95,805	93,070	89,811	86,552	83,293	80,033	76,774	73,515	70,256	66,996	63,737	60,478

The new Scottish Climate Intelligence Service (CIS) is developing a national, standard framework for assessing and monitoring effectiveness of climate action plans in Scotland in 2024. Fife will work with the CIS to both develop and implement that standard for Climate Fife.

This strategy outlines key measures for our actions to begin that process. Targets will be determined in 2024, aligned to the new national standard and reported annually throughout the Climate Change Public Bodies Report.

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Our Big Moves

Our Big Energy Move

Here we will begin to transform the energy system in Fife to low carbon.

Energy is critical to everything we all do and one of the most significant costs to Fife homes and business. We need to transform Fife's energy system to one where we have power when we need it and in a way that financially benefits the people of Fife.

Phase 1 – Policy position and technical case (2024/25)

Using the Local Heat and Energy Efficiency Delivery Plan as the basis we will bring together our different council plans, strategies and policies with pathfinding projects to establish an integrated, place-based approach to Fife's energy system. Including:

- Finding the best ways to heat our buildings and make them more energy efficient.
- Developing District Heat Networks, defining and supporting new areas and expansion.
- Establish policy position on solar energy generation, including identifying opportunities on our own estate.
- Using Fife energy resources, such as heat in rivers and sea, underground and waste heat from homes or business. Notably undertaking geothermal heat feasibility studies in partnership with British Geological Survey.
- Electric Vehicle Strategy, establishing our policy on how we will support their adoption across Fife.
- Local Energy System Prospectus for the Dunfermline/Rosyth area.
- Council estate decarbonisation pilots (from 24/25 and ongoing).

Phase 2 – Economic case and change (2025/26)

We will develop the economic case for change, working with partners across the public and private sector to develop the business models to be adopted. Including:

- Examine the different business models to manage the change.
- Agree the most resilient area-based approaches.
- Develop business cases for the changes needed that bring the best benefit to Fife.
- Seek funding from government and wider to support the delivery.

The new Local Development Plan (currently in preparation) will also provide the spatial expression of the policies developed. The Local Economic Strategy, Local Transport Strategy (currently up for approval) and the Local Housing Strategy all guide the approach.

Phase 3 – Delivery and Transformation (2026 onwards)

With the technical case developed from Phase 1 and the business model from Phase 2 we will start to deliver the transformation. Projects where the business case is made, and funding is secured will commence.

The Big Energy Move will support the people of Fife:

- Making the best use of Fife’s net zero energy, within our land resource
- Providing a transition path for Fife’s buildings, transport and business
- Strengthening energy links between communities and business
- Providing resilient local affordable energy systems
- Energy that enables community wealth and health
- Putting Fife at the forefront of the energy skills and jobs transition

Figure 2 Our Big Energy Move

2024 /25		2025 /26		2026 Onwards
LHEES Delivery Plan	PHASE 1 LOCAL ENERGY SYSTEM POLICY AGREEMENT PLACE APPROACH	PHASE 2 ECONOMIC CASE OPERATING MODELS BUSINESS CASES	PHASE 3 ENERGY DELIVERY PROGRAMME	
Geothermal Pilot				
Heat Network Zones				
EV Strategy				
PV Policy				
Local Energy System Pilot				
Estate Decarbonisation Pilots				
Ongoing activity e.g. Estate Energy Efficiency Programme, Energy Efficiency Standard for Social Housing				

Our Big Resilience Move

Here we will transform how we protect Fife from the unavoidable impacts of climate change and biodiversity loss, including through nature-based solutions.

Phase 1 – Policy position and technical case (2024/25)

Using the 2023 Risk & Vulnerability Assessment as the basis we will develop and combine policies on how we use our land and assets to adapt to the changing climate and how we support this throughout Fife. Establishing policies on: Carbon Offsetting/Insetting, Coastal Change, Resilience Strengthening, Natural Flood Management, Nature Networks and how we measure Positive Effects for Biodiversity. Nature based solutions will be implemented through our revised Local Biodiversity Action Plan and Forest and Woodland Strategy, with wider infrastructure needs delivered through ongoing and new work including:

- Flood Risk Management Plans
- Shoreline Management Plan being followed by the Coastal Change Adaptation Plan
- Property Flood Resilience Grant

Phase 2 – Economic case and change (2025/26)

We will develop the economic case for change via nature-based solutions with the Fife Coast and Countryside Trust through the [Nature Finance Fife](#) project. This is a partnership, place-based approach to understanding and meeting the needs of stakeholders to create a model to finance nature restoration at scale. Blending public, philanthropic, and private finance into a pipeline of high integrity nature-based projects across Fife for the benefit of nature, people, and the green economy.

We will develop the case for change preparedness by engaging communities of interest in resilience growth. We will also form an approach to how the Council responds to key climate impacts on our land and key infrastructure assets, and how we engage communities of interest to strengthen their own resilience.

Edinburgh and South East Scotland Risk & Opportunity Assessment will be undertaken across Fife, Edinburgh, East Lothian, Midlothian, West Lothian and Scottish Borders. This will provide detailed evidence of climate risks and will include an economic assessment of risks and engagement, enabling further priorities to be identified and support the financial case for action.

Phase 3 – Delivery and Transformation (2026 onwards)

Through implementation of key policies, land use, infrastructure resilience and the actions of communities of interest will be developed to increase Fife’s resilience to unavoidable impacts of climate change. It will be essential to progress this work with regional & community-based partnerships to grow capacity, understanding and practical preparedness for climate impacts.

- There will be clarity on responsibilities across local, regional and national stakeholders on how to prepare for and respond to climate impacts.
- The updated Local Development Plan and Coastal Change Adaptation Plan will integrate climate resilience actions.
- Infrastructure management, communities and key stakeholders will be prepared to act to reduce impacts and in the event of climate impacts.
- Nature based solutions will attenuate climate impacts in key locations.

Figure 3 Our Big Resilience Move

2024 / 25		2025 / 26		2026 Onwards	
Flood Risk Management Plans	Property Flood Resilience Fund	PHASE 1 RESILIENCE PLAN POLICY AGREEMENT PLACE APPROACH	PHASE 2 ECONOMIC CASE	PHASE 3 RESILIENCE DELIVERY PROGRAMME	
Shoreline Management Plan	Coastal Change Adaptation Plan				REGIONAL CLIMATE ECONOMIC ASSESSMENT NATURE FINANCE FIFE
Fife Risk and Vulnerability Assessment	Regional Risk and Opportunities Assessment		BUSINESS CASES		
Local Biodiversity Action Plan	Nature Networks Programme				
Forest and Woodland Strategy	Fife Climate Forest				
Ongoing Activities e.g. Biodiversity Neighbourhoods, Flood Management					

Our Big Community Move

Here we will transform our approach to supporting community climate action, empowering our communities to transform local food, waste, transport, and energy generation systems to create community wealth and wellbeing.

Phase 1 – Systems change for Community Wealth Building and Wellbeing (2024-25)

We recognise the critical need to build relationships and effective communication channels with communities across Fife. Allowing us to support and enable local climate action to flourish as a collaborative effort. Echoing the “no wrong door” approach to child poverty and family wellbeing, this transformation focuses on collaborative, place-based approaches with several key opportunities across policy, strategy and project work briefly outlined below;

- In addition to our work through Climate Action Fife, actively work with the Climate Hub to establish ongoing dialogue and partnership opportunities across sectors. Work with the Climate Hub and cross service representation on pathways to enable communities to take climate action at a local level with fewer barriers.
- Agree our position on climate approach & support in Community Place Plans (Plan for Fife, Local Community Plans, Community Action Plans, Local Place Plans).
- The Climate Place project provides the opportunity to consider place specific climate hazards/risks and enable delivery of co-designed actions to address opportunities that are identified. Additionally, funding opportunities for communities will be made available.
- Through our Local Transport Strategy and our development of Area Transport Plans we will engage communities to support behavioural change to more sustainable travel modes.
- The Food4Fife Strategy will provide a pathway and policy on supporting communities to grow and eat locally.
- Work with communities to respond to, and manage, the impacts of climate change through our Flood Risk Management Plans.
- As part of our Zero Waste Fife Strategy we will develop a Re-Use Pathfinder Project to establish policies on supporting community groups and social enterprises to deliver Re-Use and Repair programmes.
- Working in partnership with Fife Communities Climate Action Network to develop the Fife Communities Renewables Co-Operative. Establishing our policy on supporting community energy generation.

Phase 2 – Delivery and Transformation (2025 onwards)

Agree our community wealth building approach and local place-based approach for a range of place plans, projects and funding opportunities.

- Established communication channels/methods across sectors are operational, helping communities to better undertaken climate action with support of Climate Action Fife and the Fife Climate Hub.
- Agreed collaborative approach to identifying and bidding for funding that supports community climate action.

Figure 4 Our Big Community Move

2024 / 25		2025 Onwards
Food for Fife Strategy	<p style="text-align: center;">PHASE 1</p> <p style="text-align: center;">ENVIRONMENTAL COMMUNITY WEALTH BUILDING POLICY AGREEMENT PLACE APPROACH</p>	<p style="text-align: center;">PHASE 2</p> <p style="text-align: center;">ENVIRONMENTAL COMMUNITY WEALTH BUILDING PROGRAMME</p>
Re-Use Pathfinder		
Community Renewables Feasibility		
Fife Climate Hub		
Climate Place Projects		
Area Transport Plans		
<p>Ongoing Activities e.g. Climate Action Fife, Recycling Engagement</p>		

Our Action Plan Programme

Buildings

We will decarbonise our buildings by becoming more energy efficient and using more low carbon energy sources. We aim to reduce our emissions from our own buildings by 68% by 2030 against 2020 levels.

Energy use in non-industrial buildings constitutes around 22% of the Fife's Carbon Footprint, and over 75% of Fife Council's own footprint. The actions described below reflect our short-term priorities to cut carbon emissions. However increased pace and scale of action is required, and we have prepared a Local Heat and Energy Efficiency Strategy and Delivery Plan to develop further action across the Council estate, homes and businesses.

We will:

Schools, Offices and Community Buildings

What we will do	How we will measure our success	When we will do it	Big Move
Build Dunfermline Learning Campus to become the largest Passivhaus standard building in Europe	<ul style="list-style-type: none"> • Carbon emissions from our public buildings • Number of refurbishment projects incorporating low carbon technology 	By Summer 2024	-
Invest at least £13.6m in decarbonising around 22 existing buildings.	<ul style="list-style-type: none"> • Carbon emissions from our public buildings • Number of non-domestic buildings that have had their heating and hot water systems decarbonised • Number of refurbishment projects incorporating low carbon technology • Capital spend on carbon and energy reduction 	by 2028	-
Invest up to £3.1m in energy efficiency works through the Energy Management Revolving Fund over the next four years, for example upgrading stage lighting in 5 venues.	<ul style="list-style-type: none"> • Carbon emissions from our public buildings • Capital spend on carbon and energy reduction 	2024-26	-
Take opportunities to enhance energy efficiency during major repairs and refurbishments on existing buildings. Including converting gas catering appliances to electric when due for upgrade. Low carbon heating and hot water prioritised.	<ul style="list-style-type: none"> • Carbon emissions from our public buildings • Number of non-domestic buildings that have had their heating and hot water systems decarbonised 	2024-27	Energy
Establish all new construction projects to deliver low in use energy consumption and align with net zero objectives.	<ul style="list-style-type: none"> • Number of new buildings meeting the Passivhaus standard or exceeding the SFT performance metric (67kWh/m²/annum energy use) 	2024-27	-

	<ul style="list-style-type: none"> • <i>Number of non-domestic buildings that have had their heating and hot water systems decarbonised.</i> 		
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Housing

What we will do	How we will measure our success	When we will do it	Big Move
Build 750 new affordable houses per annum to the Silver Plus Standard (by 2027) as part of the Phase 4 Affordable Housing Programme (2024-29). All houses built to EPC B rating and have zero-emissions heating systems.	<ul style="list-style-type: none"> • <i>Number of new buildings built to Silver Plus Standard</i> • <i>Capital spend on carbon and energy reduction.</i> 	By 2027	-
Provide home energy advice to 19,950 people (2024/24) through: government and local advice and schemes; in-depth telephone advice; and energy advice/measures as part of the Handy Service. Continued annual programme.	<ul style="list-style-type: none"> • <i>Number of refurbishment projects incorporating low carbon technology</i> • <i>Capital spend on carbon and energy reduction.</i> 	2024-27	-
Increase the energy efficiency of 1,500 council houses per annum. Including general energy efficiency improvements and through External Wall Insulation schemes (EWI).	<ul style="list-style-type: none"> • <i>Number of refurbishment projects incorporating low carbon technology</i> • <i>Capital spend on carbon and energy reduction.</i> 	2024-27	-

Businesses

What we will do	How we will measure our success	When we will do it	Big Move
Undertake Condition Surveys across all Economic Development Business Properties (industrial, office and business centres across Fife) to assess EPC Ratings. Implement energy efficiencies in line with recommendations through investing in solar PV, LED Lighting, EV Charging Units, heating systems. Investment committed during 2024-2035 is £420K.	<ul style="list-style-type: none"> • <i>Carbon emissions from our public buildings</i> • <i>Number of non-domestic buildings that have had their heating and hot water systems decarbonised</i> • <i>Number of refurbishment projects incorporating low carbon technology</i> • <i>Capital spend on carbon and energy reduction.</i> 	2024-2035	Energy

Looking to the future

There are significant opportunities to reduce our emissions through sharing assets across the public estate. We will create a shared asset plan between public sector stakeholders in Fife to facilitate further carbon efficiencies for both building stock and to reduce travel.

Low Carbon Energy

We will use and support low carbon fuel use and renewable energy generation in Fife.

Energy is critical to support everything we do, a significant cost to people and businesses, and a cause of fuel poverty. To tackle the climate emergency, over 80% of the energy we use in Fife needs to change to low carbon energy sources.

Energy supply is constrained through our existing infrastructure, and new generation, supply and storage is needed to meet future demand. Public sector bodies, like Fife Council, can play a vital role as anchors to support the energy transition, allowing us to explore options for local energy ownership in Fife and develop policy and plans like our Local Heat and Energy Efficiency Strategy to support and enable change. We will:

Renewable Generation

What we will do	How we will measure our success	When we will do it	Big Move
Install 200kW of solar panels on the new Dunfermline Learning Campus	<ul style="list-style-type: none"> <i>kWh of renewable energy and heat generated by our own estate</i> 	2024	-
Add solar panels to suitable non domestic buildings (inc schools and a leisure centre) within the scope of the Energy Management Revolving Fund.	<ul style="list-style-type: none"> <i>kWh of renewable energy and heat generated by our own estate</i> 	from 2024	-
Support Community Renewables projects, identifying where we can provide assets for community use and act as a customer for energy generated.	<ul style="list-style-type: none"> <i>Number of community renewable energy projects supported</i> 	2024-27	Energy Community

Low Carbon Fuel

What we will do	How we will measure our success	When we will do it	Big Move
Investigate offset gas consumption for larger buildings by maximising the use of low carbon electricity for heating and hot water generation	<ul style="list-style-type: none"> <i>kWh of renewable energy and heat generated by our own estate</i> 	2024-27	Energy
Support the development of low carbon heat networks; - investigating possible expansion of our District Heating schemes.	<ul style="list-style-type: none"> <i>kWh of renewable energy and heat generated by our own estate</i> 	2024-27	Energy
Support the development of low carbon heat networks; - development of a pilot Dunfermline & Rosyth area energy plan.	<ul style="list-style-type: none"> <i>kWh of renewable energy and heat generated by our own estate</i> 	2024-2025	Energy

Innovation and Skills

What we will do	How we will measure our success	When we will do it	Big Move
Be an active partner in SGN's H100 Project, developing a world-first green hydrogen network in Buckhaven and Denbeath. Trial green hydrogen as a zero-carbon fuel for heating and cooking in 300 homes (2024-2027).	<ul style="list-style-type: none"> <i>kWh of renewable energy and heat generated by our own estate</i> 	2024-27	Energy
Implement our Economic Strategy to support the creation of jobs and support skills to help the energy transition on a Fife-wide and regional basis.	<ul style="list-style-type: none"> <i>Green jobs within Fife</i> 	2024 onwards	-

Looking to the future

Planning how the energy system needs to change in Fife is critical to support many of the other changes we need to make. This needs even more partnership working between the energy utilities, public bodies, businesses, education, and communities.

We will work with our public sector partners to map out our existing building and land assets, assessing the potential for energy generation, energy resources such as geothermal, energy supply, and low carbon fuel use.

As energy does not respect borders, we will also work regionally to help plan the changes needed, from big energy networks to decisions about our homes and transport.

Zero Waste

We will reduce, re-use and recycle more of Fife’s waste and support a move to a circular economy.

Waste generated is a major contribution to Fife’s carbon footprint, and this climate impact can be most effectively addressed by applying the Waste Hierarchy (Reduce, Re-Use, Recycle) to what we consume and by diverting waste from landfill.

Fife Council, as one of the largest managers of waste, can both lead and support people, communities, and businesses to reduce their impact. By providing a waste collection service that meets our commitments under the “Household Waste Recycling Charter”, we can improve recycling. Reducing the amount of waste generated, through Reduction and Re-Use, is also needed to address the challenge.

We will:

Reduce

What we will do	How we will measure our success	When we will do it	Big Move
Undertake behavioural change campaigns to encourage reduction in waste.	<ul style="list-style-type: none"> Volume of waste collected in Fife 	2024-27	Community
Work in partnership with the Big Hoose to repurpose Amazon and other corporate donors of household goods and toiletries. Positively impacting those struggling to afford household goods such as beds, mattresses, kitchen items and clothing.	<ul style="list-style-type: none"> Volume of waste diverted for re-use Community waste schemes supported 	2024	Community
Work with Zero Waste Scotland on food waste reduction research project to identify behavioural change actions that can be implemented across Fife.	<ul style="list-style-type: none"> % of waste to landfill % of waste recycled Volume of waste diverted for re-use 	2024	Community

Reuse

What we will do	How we will measure our success	When we will do it	Big Move
Use our waste facilities to promote and encourage re-use, including developing re-use hubs across Fife.	<ul style="list-style-type: none"> Volume of waste diverted for re-use Community waste schemes supported 	2024-27	Community
Support re-use scheme with Fife based social enterprises, including bikes, furniture and clothes.	<ul style="list-style-type: none"> Volume of waste diverted for re-use Community waste schemes supported 	2024-27	Community

Recycle

What we will do	How we will measure our success	When we will do it	Big Move
Promote recycling through our annual climate communications plan.	<ul style="list-style-type: none">• <i>% of waste to landfill</i>• <i>% of waste recycled</i>	2024-27	-
Expand our recycling provision to properties across Fife, trialling food waste collection in high rise properties.	<ul style="list-style-type: none">• <i>% of waste to landfill</i>• <i>% of waste recycled</i>	2024-25	-

Looking to the future

Our recycling infrastructure needs to be fit for the future. With new legislation encouraging a more circular economy, we will review our provision of domestic kerbside collection and recycling points to ensure we meet national standards.

Communications are essential and we will work with public and private sector partners to establish a Fife wide branding for recycling and re-use, supporting people to recycle and re-use more.

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Transport and Travel

We will promote low carbon and active travel and decarbonise our fleet.

The Local Transport Strategy for Fife 2024-2033 (draft for consultation) sets out a vision for a transport system that “...supports our communities with affordable, seamless and sustainable access to all aspects of our daily lives.” With greenhouse gas emissions from transport constituting around 18% of Fife’s Carbon Footprint, changes to how we travel for work and leisure can play a vital role in tackling the climate emergency.

Infrastructure improvements including walking, wheeling and cycling routes, electric vehicle charging, park and ride schemes and the Levenmouth Rail Link; as well as supporting behavioural change, all contribute to meeting our target.

Fife Council can also make a direct impact through its own fleet and travel for work. Our fleet makes it possible for us to deliver public services efficiently, and we know that the miles we drive impact the climate. With more than 30 electric vehicles we have made some initial impact, but significant challenges lie ahead to decarbonise the rest of our fleet.

By implementing hybrid working for some staff we have seen significant reduction in travel for commuting. Offering smarter and flexible working arrangements allows us to continue to reduce Fife’s emissions.

We will:

Travel for Work and Leisure

What we will do	How we will measure our success	When we will do it	Big Move
Roll out public electric vehicle chargers and support the private sector to provide chargers, with further details to be included in our upcoming Electric Vehicle Strategy and Expansion Plan.	<ul style="list-style-type: none"> Number of charging stations. 	from 2024	Energy
Deliver new walking, wheeling and cycling infrastructure, including the Levenmouth Connectivity Project.	<ul style="list-style-type: none"> Carbon emissions from travel. Kilometres of traffic-free walking, wheeling and cycling routes. 	2024-27	Community
Deliver bus priority lanes and improved bus stops on key routes through the Bus Partnership Fund.	<ul style="list-style-type: none"> Carbon emissions from travel. 	from 2024	-
Review the Fife Council Travel Plan to support hybrid working.	<ul style="list-style-type: none"> Carbon emissions from travel. Reduction in business mileage. 	2024	-

Our Vehicles

What we will do	How we will measure our success	When we will do it	Big Move
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We will educate Council staff in fuel efficient driving and journey planning techniques.	<ul style="list-style-type: none"> • <i>Number of training sessions in fuel efficient driving or journey planning.</i> • <i>Reduction in diesel fleet miles driven.</i> 	2024-27	-
We will introduce smarter working practices to reduce unnecessary miles and fuel costs.	<ul style="list-style-type: none"> • <i>Carbon emissions from travel.</i> • <i>Number of training sessions in fuel efficient driving or journey planning.</i> • <i>Reduction in business mileage.</i> 	From 2024	-
We will reduce the council's grey fleet miles.	<ul style="list-style-type: none"> • <i>Reduction in business mileage.</i> 	2024-27	-
Seek and secure investment for the green fleet transformation.	<ul style="list-style-type: none"> • <i>Carbon emissions from travel.</i> • <i>Reduction in diesel fleet miles driven.</i> 	2024-27	Energy

Looking to the future

To meet our targets, we must reduce how much we travel; switch to walking, wheeling, cycling and public transport; and switch to zero emissions vehicles. The actions outlined in the Local Transport Strategy will drive these changes, while also benefitting equality, health and the economy.

With changing technologies there will be increasing opportunities to decarbonise our fleet and we will investigate investment strategies and operating models to progress this. We will also work with our public sector partners to explore options for shared fleet services across organisations.

Nature and land

We will protect and enhance our natural environment to respond to the climate emergency.

Fife's landscape supports a rich diversity of habitats, from the stunning coastline of cliffs and sand dunes of East Neuk, to the heathland of the Lomond Hills. These are home to over 10,000 different species of plants and animals. This tapestry of habitats, and the species they support, together make up biodiversity - the variety of life in Fife. This biodiversity is key to our health and well-being, building resilience to the impacts of climate change and helping absorb carbon emissions.

In 2021 Fife Council signed the Edinburgh Declaration on Biodiversity, committing the Council to mitigating the effects of climate change and improve local biodiversity. Fife Council, in partnership with the Fife Coast and Countryside Trust, will take a lead role as we work together to tackle the nature emergency.

We will:

Protecting and enhancing our Natural Heritage

What we will do	How we will measure our success	When we will do it	Big Move
Create Biodiversity Neighbourhoods across Fife. Undertake enhancement projects in each of the 7 localities.	<ul style="list-style-type: none"> Area of land enhanced to support climate aims Number of people engaged in volunteering to help nature. 	2024	-
Develop Nature Finance Fife approach.	<ul style="list-style-type: none"> Area of land enhanced to support biodiversity aims Area of land managed for biodiversity aims. 	2024-26	Resilience
Develop the "Fife Climate Forest" project, supporting tree planting across Fife to enhance nature networks, mitigate our climate impacts and empower communities.	<ul style="list-style-type: none"> Number of trees planted Number of people engaged in volunteering to help nature 	2024-26	Resilience
Enhance the biodiversity of our Rivers through projects including: The River Park in Levenmouth, the Dreel Burn, Lynn Burn and the River Eden projects.	<ul style="list-style-type: none"> Area of land enhanced to support climate aims 	2024-27	Resilience
Protect our existing biodiversity by identifying and designating Wildlife Sites and Nature Networks across Fife.	<ul style="list-style-type: none"> Area of land enhanced to support climate aims Area of land actively managed for biodiversity 	2024-24	-

Using our land assets for climate action

What we will do	How we will measure our success	When we will do it	Big Move
Support community growing on public sector land.	<ul style="list-style-type: none"> • <i>Areas of land used for community growing</i> • <i>Number of people engaged in volunteering to help nature.</i> 	2024-27	-
Invest in the naturalisation and repurposing of brownfield land supported by Fife Council's allocation of the Scottish Government's Vacant & Derelict Land Fund, alongside a range of other funding sources.	<ul style="list-style-type: none"> • <i>Area of land enhanced to support climate aims</i> • <i>Area of land actively managed for biodiversity.</i> 	2024-26	Energy Resilience Community
Support asset transfer to create and manage places to be more resilient to the climate emergency.	<ul style="list-style-type: none"> • <i>Area of land enhanced to support climate aims</i> • <i>Number of people engaged in volunteering to help nature.</i> 	2024-27	-
Work with our public sector partners to manage our land assets for the benefit of climate.	<ul style="list-style-type: none"> • <i>Area of land enhanced to support climate aims</i> • <i>Area of land actively managed for biodiversity.</i> 	From 2024	-

Looking to the future

Our Local Biodiversity Action Plan will be refreshed to reflect new challenges and priorities for Fife's nature. Working in partnership with the Fife Coast and Countryside Trust, we will develop new approaches to investment for nature-based solutions and promoting good management of Fife's biodiversity through the Nature Finance Fife project.

With our public sector partners, we own and manage a wide range of land assets. This provides us with an opportunity to work together, combining our approaches and maximising the benefits for climate and nature.

Protecting and supporting our communities

We protect our communities and businesses from the impacts of climate change and empower people to take action locally.

Climate change is already having an impact on the way we live. The Met Office reported that 2022 was “a record-breaking year for weather and is a sign of the UK’s changing climate” noting “a new all-time temperature record of 40.3°C was set on 19 July during an unprecedented heatwave”. In the future we can anticipate warmer and drier summers, milder and wetter winters, and an increase in intense, heavy rainfall events and storms, sea level rise and increased frequency of flooding and coastal impacts. As such it’s important we both provide infrastructure to minimise the risk to communities, and support communities to take action themselves.

Fife benefits from having several community groups delivering climate action, represented in part by the Fife Communities Climate Action Network (FCCAN). Fife Council aims to work in partnership with communities to take a place-based approach to tackling the climate emergency.

Fife can also benefit from the transition to a green economy, benefitting from green tourism, and green skills in manufacturing, construction, and renewable technologies.

We will:

Flood Resilience and Climate Risk Management

What we will do	How we will measure our success	When we will do it	Big Move
Continue to deliver flood mitigation actions via Local Flood Risk Management Plans and other flood risk management work areas.	<ul style="list-style-type: none"> Number of flooding projects being progressed, underway and complete. 	2024-27	Resilience
Maintain the road drainage network (gully emptying, ditching etc.) through a new risk-based approach.	<ul style="list-style-type: none"> Number of gullies and ditches attended. 	2024-27	-
Provide a 'Property Flood Resilience' grant to support home improvements for protection against flooding.	<ul style="list-style-type: none"> Number of homes supported through the Property Flood Resilience grant. 	from 2024	Resilience
We will work with partners to plan for the current and future effects of climate change, defining and maintaining acceptable levels of risk and prepare an action plan based on the Fife Climate Risk & Vulnerability assessment.	<ul style="list-style-type: none"> Number of climate risk projects being progressed, underway and complete. 	2024-24	Resilience

Community Action

What we will do	How we will measure our success	When we will do it	Big Move
Work in partnership with community organisations to support local climate action including Climate Action Fife, FCCAN and the Fife Climate Hub (2024).	<ul style="list-style-type: none"> • <i>Number of climate risk projects being progressed, underway and complete.</i> • <i>Number of businesses supported to become more climate ready.</i> 	2024-27	Community
Deliver Climate Ready Places project offering grants to communities to improve buildings and land.	<ul style="list-style-type: none"> • <i>Number of climate risk projects being progressed, underway and complete.</i> 	2024-25	Energy Resilience Community
Deliver Climate Literacy training to public sector staff.	<ul style="list-style-type: none"> • <i>Number of staff trained in Climate Literacy.</i> 	2024-27	-

Business, Skills and Jobs

What we will do	How we will measure our success	When we will do it	Big Move
Support local businesses to accelerate their transition to net zero including through signposting to sources of funding and promoting energy, waste & water efficiencies and climate adaptations.	<ul style="list-style-type: none"> • <i>Number of businesses supported to take climate actions.</i> 	2024-27	-
Work with regional partners to research green skills to bolster and grow the workforce across Fife including opportunities arising from the Forth Green Freeport.	<ul style="list-style-type: none"> • <i>Number of Green Jobs in Fife.</i> 	2024-25	Energy
Support the Food4Fife partnership and to deliver projects supporting local food production through the Allotment and Community Growing Strategy and wider food redistribution to reduce waste and tackle food poverty.	<ul style="list-style-type: none"> • <i>Area of land for community growing.</i> 	2024-27	Community
Undertake a Risk & Opportunities Assessment with the Edinburgh & South East Scotland City Deal partners to assess the economic impacts of climate change in the region.	<ul style="list-style-type: none"> • <i>Number of climate action projects being progressed, underway and complete.</i> 	2024-25	Resilience

Looking to the future

We will work with public sector partners to create a shared approach to increase the climate resilience of public sector buildings and the services delivered from them.

Helping communities to be resilient to the impacts of unavoidable climate change will need to be an increasing part of our overall climate response.

Growing and distributing food locally is one way to support resilience. Implementation of the Food4Fife Strategy and the Allotment and Community Growing Strategy will include creating local systems that grow and distribute food locally, enabling businesses and communities to work together.

We will also work with partners on a regional approach to new skills development training needs, linking regional colleges and universities to develop a regional Net Zero Accelerator Hub and explore supply chain opportunities arising from the Forth Green Freeport.

Conclusion

There are big challenges ahead, and some already with us now such as the impacts of increased storms and intensity of rainfall impacting travel, as well as scarcity of resources to take additional actions. Careful consideration and planning will be needed to support the increased pace and scale of change needed.

The challenge can seem overwhelming to individuals, so coming together in partnership is key, supporting each other to make lasting changes and build resilience. The Fife Environmental Partnership, Addressing the Climate Emergency Board and Climate Action Fife partnership efforts will oversee progress and support delivery to enable carbon emissions reduction and adaptation to climate impacts.

Links to associated Strategies

Table 2 Associated Strategies and Plans

Fife Strategies	Buildings	Low Carbon Energy	Zero Waste	Transport and Travel	Nature and Land	Protecting and supporting our communities
<i>Fife Air Quality Strategy (2021-2025)</i>	X	-	X	X	X	X
<i>Fife Allotment and Community Food Strategy (due 2024)</i>	-	-	-	-	X	X
<i>Fife's Economic Strategy (2024-30)</i>	X	X	X	X	X	X
<i>Flood Risk Management Plans</i>	-	-	-	X	X	X
<i>Food4Fife Strategy (Draft - due 2024)</i>	-	-	X	X	X	X
<i>Forest and Woodland Strategy (2013-2018)</i>	-	-	-	-	X	X
<i>Local Biodiversity Action Plan (2013-2018)</i>	-	-	-	-	X	X
<i>Local Heat and Energy Efficiency Strategy (Draft – due 2024)</i>	X	X	-	-	-	-
<i>Local Development Plan (due 2024)</i>	X	X	-	-	-	-
<i>Local Transport Strategy for Fife (2024-2033)</i>	-	-	-	X	-	X
<i>The Draft Local Housing Strategy (2022-27)</i>	X	X	-	-	-	-
<i>Shoreline Management Plan</i>	-	-	-	-	X	X
<i>Sustaining Success: Property Asset Strategy 2024-28 (draft)</i>	X	X	-	-	X	X
<i>River Basin Management Plan</i>	-	-	-	-	X	X
<i>Zero Waste Fife (2018-28)</i>	-	X	X	-	X	X

Appointment of Chief Planning Officer (CPO)

Report by: Sharon McKenzie, Head of Human Resources

Wards Affected: n/a

Purpose

To advise members that there is a new statutory requirement for the council to appoint a Chief Planning Officer, and to agree the Head of Planning as the council's Chief Planning Officer.

Recommendation(s)

Cabinet is asked to:-

- (1) note the statutory requirement for the council to appoint a Chief Planning Officer; and
- (2) agree that the responsibilities of the Chief Planning Officer role be incorporated into the remit of the Head of Planning.

Resource Implications

None

Legal & Risk Implications

None

Impact Assessment

An EqIA has not been completed and is not necessary because the report does not propose a change or revision to existing policies and practices.

Consultation

Discussion has been held with the Head of Planning who is supportive of the position outlined in this report.

1.0 Background

- 1.1 The statutory requirement for every planning authority to appoint a Chief Planning Officer (CPO) came into effect earlier this year with the introduction of the Town and Country Planning (Scotland) Act 1997 (as amended) by section 50 of the Planning (Scotland) Act 2019.
- 1.2 The role of the CPO is to help strengthen leadership in planning and provide corporate recognition to the importance and positive influence of planning within authorities.
- 1.3 The Scottish Government recognises that this role already exists in some form in planning authorities and has issued guidance to ensure some consistency between authorities and how the role contributes to the aims of the National Planning Framework.

2.0 Context

- 2.1 The appointment of a CPO brings an opportunity to support a more placed-based approach, supporting the council's Place principle, climate change and community wealth building agendas.
- 2.2 A key part of this role will be to ensure that planning is at the forefront of the council's investment plans, helping to ensure that planning and place are being taken into account when making strategic decisions about investment, asset management, resources, integrated service delivery, in alignment with the Place principle.
- 2.3 The CPO will act as the:
 - Professional adviser to corporate and political governance within the council
 - Place-making champion
 - Head of profession
 - Senior responsible officer for the planning service, ensuring that national planning priorities are delivered.

3.0 Skills, experience and qualification requirements

- 3.1 The Scottish Government has provided guidance to authorities outlining the CPO role and qualification requirements which are detailed below.
- 3.2 A Chief Planning Officer should be able to demonstrate experience in:
 - leadership
 - the effective and efficient management of planning services including motivating and developing staff, individually and in teams, to achieve improved planning performance and service delivery
 - developing and maintaining relationships with elected members and providing an interface between elected members and officials
 - developing and maintaining effective and productive working relationships with external stakeholders
 - change management and the application of continuous improvement
 - embedding a performance management culture that focuses on clear quality standards, service targets and outcomes
 - leading and integrating multi-disciplinary teams of professional, operational and/or support staff

- delivering quality, customer-focused services, integrating customer care strategies and targets into planning service delivery
 - delivering an inclusive and accessible planning system through effective partnership working with local communities and with other public, private and voluntary sector organisations
 - embedding the customer first ethos
- 3.3 Although not essential, it is highly desirable for the CPO to hold chartered membership of the Royal Town Planning Institute (RTPI), the professional body of planners. The Act also recognises other associated professional disciplines could hold this role, e.g. civil engineering.
- 3.4 The council's Head of Planning role embeds the requirements outlined above. The job profile will be updated to reflect the changes set out in this report.
- 3.5 The CPO role and responsibility will be communicated across the council through the council's intranet and other channels as appropriate.

4.0 Conclusions

- 4.1 The council has a statutory duty to appoint a CPO and the Head of Planning role incorporates the necessary skills, knowledge, experience and qualification requirements as outlined by the Scottish Government's guidance.
- 4.2 The Head of Planning can therefore be expected to act as the council's CPO and the arrangements set out in this report provides the necessary framework to support this.

Report Author:

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National Building Standards Hub – Hosting Within Fife Council

Report by: Nigel Kerr, Head of Protective Services

Wards Affected: All

Purpose

The purpose of this report is to seek approval for Fife Council to formally host the permanent national Building Standards Hub (BSH) as a separate specialist unit within Protective Services delivering national specialist advice, learning and development and a range of building standards system services to all Scottish local authority building standards teams and wider construction sector stakeholders.

Recommendation(s)

It is recommended that committee:

- (1) note that the Scottish Government has approved the creation of a national Building Standards Hub and awarded the hosting of the Hub to Fife Council as a specialist unit within Fife Council's Protective Services
- (2) approve the hosting of the newly established Building Standards Hub within Fife Council, noting that the Building Standards Hub will be fully funded from building warrant fee income: and
- (3) remit the Heads of Protective Services, Legal, and Finance to engage with Scottish Government to complete the contractual arrangements.

Resource Implications

The cost of operating the BSH at full capacity has been established as being around £1.3 million pounds in the first year (2024/25), increasing annually in line with inflation. All BSH operating costs will be funded, in full, from the building warrant fees, also increasing annually in line with inflation.

The proposed mechanism to transfer the funding to the host authority and BSH will be an annual payment to Fife Council via a budgetary transfer from the Scottish Government in the local authority's financial settlement grant. This is currently being discussed with CoSLA whose officials are content with the proposed approach.

The BSH will have 10.5 full time equivalent staff who will be employees of Fife Council, the directors of which will be line managed by the Head of Protective Services. Role titles and profiles will also be subject to evaluation and regulated by Fife Council HR.

As all costs will be entirely met by the building warrant fee, and as the funding will increase in line with annual inflationary rises, there are no cost or resource implications for Fife Council.

Legal & Risk Implications

Change management implications have been considered as part of the BSH Pilot programme, which is currently running within Fife Council, and includes the consideration of legal matters and risk.

External legal advice was sought and obtained on the creation of a BSH, noting Fife Council's 'willingness' to be the host organisation and employer of the staff required to operate the BSH.

As noted above, funding for the BSH has been secured by direct payment from the building warrant fees, via a mechanism currently under discussion, through a budgetary transfer in Fife Council's financial settlement.

Fife Council, as part of the BSH hosting agreement with the Scottish Government, will seek comfort from them in relation to potential losses on the basis that Fife Council will be facilitating the BSH for the benefit of Scottish Government, the other 32 local authorities and wider industry stakeholders and should not be exposed to risk as a consequence.

As part of the BSH change management exercise, the council has consulted its insurers to ascertain the implications of the liabilities the BSH presents and, as a result, the required level of indemnity cover has been identified and costed.

The services the BSH will provide for local authorities will be included within a Memorandum of Understanding (MOU) between the BSH and all 32 local authorities.

The work of the BSH and its place within the building standards system will also be referenced within the National Operating and Performance Frameworks that local authorities must work to as part of their conditions of appointment as verifiers by Scottish Ministers.

Whilst responsibility and line management of the hub will come from Fife Council, there is a need for the BSH to be seen to be operating sufficiently independently of the council. As such, a separate governance or leadership group is required to have oversight of the operation of the BSH and to determine its strategic direction. This leadership group is detailed below as is its reporting mechanism.

All members of the BSH will be bound by the terms of data protection legislation, which will be considered within Fife Council with all necessary measures put in place prior to commencement of the permanent BSH.

Impact Assessment

An Equality Impact Assessment (EqIA) is not required at this stage as there are presently no changes to existing service delivery and policy. However, this will be carried out as BSH specific processes and policy is established.

Consultation

During the currency of the BSH Pilot programme in the development of the proposals to establish a permanent BSH, the following key stakeholders have been consulted:

- The Convention of Scottish Local Authorities (CoSLA)
- The Society of Local Authority Chief Executives (SoLACE)(Scotland Office)
- The Scottish Government [Building Standards Division \(BSD\)](#)
- [Local Authority Building Standards Scotland \(LABSS\)](#)
- The Delivery Model Working Group (DMWG)
- The Building Standards Futures Program Board
- Local authority building standards managers/team leaders and LABSS members
- Key industry stakeholders

The Heads of Finance, Legal and Human Resources and trade unions have also been consulted on this report.

1.0 Background

- 1.1 The Building Standards Futures Programme Board was set up by the Minister for Local Government and Communities to provide guidance and direction on the development and implementation of recommendations made by the Review Panels on Compliance and Enforcement and Fire Safety which reported in 2018. These review panels were formed by the Ministerial Working Group on Building and Fire Safety following failings in the construction of Edinburgh School Buildings and the Grenfell Tower fire.
- 1.2 The Board's remit is to strategically advise and direct a broad programme of work aimed at improving the performance, expertise, resilience and sustainability of the Scottish building standards framework and services across Scotland.
- 1.3 Recommendations are being taken forward through the following work streams:
 - Verification Delivery Model
 - Workforce Strategy
 - Certification Strategy
 - Compliance Plan Approach
 - Digital Transformation
 - Technical Strategy
 - Verification Standards
- 1.4 Each of the work streams is led by officers within the Building Standards Division of the Scottish Government and involves a range of stakeholders from construction industry organisations, professional bodies and public bodies including Scottish Futures Trust, Skills Development Scotland, BE-ST and local authorities (through Local Authority Building Standards Scotland - LABSS).
- 1.5 It is under the verification delivery model workstream that the framework for the BSH was considered.
- 1.6 LABSS options appraisal, proposing reshaping of the building standards system was considered by The Futures Programme Board Delivery Model Working Group (DMWG) which resulted in the setting up of the Delivery Model Development Group (DMDG) to deliver the proposal to develop and deliver a BSH to drive change in the delivery of the building standards system with an aim to:
 - Deliver excellent Public Services.
 - Drive efficiencies.
 - Increase capacity to deliver across all types of construction work.
 - Ensure investment in skills and new technology.
 - Provide resilience.
 - Increase consistency.
- 1.7 The pilot programme was established to demonstrate the viability and sustainability of a BSH and identify the improvements that could be made to the current building standards delivery model, including the development of regional partnerships, the centralised administration of national building standards system services and specialist activities.
- 1.8 Fife Council was appointed as the host authority to support the BSH pilot programme and has successfully done so since the pilot inception on the 23 May 2022.

- 1.9 The pilot programme is due to end on the 24 May 2024, which will coincide with the commencement of the permanent BSH.
- 1.10 The BSH pilot is managed and operated by 2.0 FTE appointed directors, 0.5 FTE administration and technical support officer (located within Fife Council) and the LABSS consultant.
- 1.11 Direct oversight of the BSH Pilot comes from the DMDG. Work to support the BSH has included:
- Evaluating likely costs and fees for running and maintaining a hub model and how revenue will be collected and distributed.
 - Considering the existing building warrant fee structure.
 - Feeding findings and suggestions into the Delivery Model Working Group's considerations on funding the new strengthened building standards system.
 - Providing options on how a BSH could be hosted.
 - Setting out how a BSH should be phased/implemented.
 - Establishing the roles and responsibilities of the BSH, including how it should be governed, who is responsible for its operation and how to make it viable.
 - Determining the likely workloads and appropriate levels of resources required to meet expectations of those using this service.
 - Identifying the skills, qualifications and experience required for full time staff working in the BSH. This should take account of agreed hub activity and the formation of specialist resources facilitated by the hub to deal with specific subject areas, such as fire engineering, structural engineering, energy performance, education, etc.
 - Determining the IT and digital infrastructure required, to operate and enable a Hub to operate.
 - Working with wider industry, Improvement Service, SOLACE, COSLA and all 32 local authorities to promote the advantages of the BSH.
- 1.12 The BSH Pilot is delivering the outcomes on this remit under seven work streams, which are:
- Implement a business plan, monitor progress, assess benefits, assess risk, report outcomes.
 - Investigate establishing BSH responsibilities, work sharing practices and national decisions.
 - Investigate establishing enhanced partnership working and operational partnerships.
 - Investigate establishing a Fire Hub.
 - Investigate establishing a Structural Engineering Hub.
 - Investigate establishing a Digital Hub.
 - Investigate establishing a Knowledge and Learning hub.
- 1.13 Progress on these areas of work is either complete or well advanced and nearing completion with some objectives now being considered as 'business as usual'.
- 1.14 The pilot programme has demonstrated that the concept of a permanent BSH will deliver improvement to the current building standards system and delivery model as well as providing an asset that can support local authority building standards services as well as wider industry and those who use and interact with the building standards system.
- 1.15 The model and structure for a permanent BSH has been fully developed, demonstrated, and costed, backed up by technical and strategic business cases.

- 1.16 The BSH model, structure and costings have been formally presented to and approved by the DMWG with the recommendation that they be taken and presented to the Building Standards Futures Programme Board.
- 1.17 The BSH model, structure and costings have subsequently been formally presented to the Building Standards Futures Programme Board and were approved subject to minor amendments to bring in the BSH resident fire expert sooner in the phasing and to also implement the full BSH structure faster. These amendments were incorporated into the technical and strategic business plan and have been reported back to the Board.
- 1.18 The strategic business case has been formally presented to, and approved, by the DMWG with the recommendation that it be taken and presented to the Building Standards Futures Programme Board.
- 1.19 The strategic business case has subsequently been formally presented to, and approved, by the Building Standards Futures Programme Board with the recommendation that it be taken and presented to Scottish Ministers. They also confirmed that there is a case to implement a permanent BSH.
- 1.20 The Scottish Government [consulted](#) on proposals to increase building warrant application fees with a view to funding the BSH as well as other building standards related initiatives. The outcome analysis of the consultation being that there is support to fund a permanent BSH through an increase in building warrant application fees.
- 1.21 The Building Standards Futures Programme Board's recommendation for the creation of a permanent BSH, together with the findings from the fees consultation have been presented to Scottish Ministers and they have subsequently invited Fife Council to host the permanent BSH funded through an overall increase in building warrant application fees.
- 1.22 The DMDG, through the BSD, have kept CoSLA appraised of all BSH Pilot developments and sought their views on all relevant development activity. This has led to overwhelming support for the pilot programme and the creation of a permanent BSH. As noted above, this consultation includes the proposed mechanism to fund the host authority through a budgetary transfer in their financial settlement from Scottish Government.
- 1.23 SoLACE have also been fully appraised of BSH Pilot developments through the chair of the Building Standards Futures Programme Board (Craig Hatton) who is also the SoLACE Scotland Lead for Climate Change and Chief Executive of North Ayrshire Council.
- 1.24 Through the SoLACE Scotland Branch Briefing Note dated 26 May 2023, expressions of interest in hosting the BSH were sought from local authorities, which resulted in Fife Council being successful in the role, subject to agreement of terms of appointment.
- 1.25 The LABSS executive and management team have been fully appraised of developments and the BSH Pilot has sought their views on all relevant development activity to ensure buy in to the purpose of the proposed BSH and its range of services and activity.
- 1.26 Similarly, building standards managers/team leaders and the LABSS membership have received numerous communications during the currency of the pilot programme to ensure they had awareness of all development areas and activities.
- 1.27 BSH development and related activity has also been a continual topic at various LABSS forums, including executive, management and general meetings.

- 1.28 During the currency of the BSH Pilot, there have been more than 50 different stakeholders/stakeholder groups engaged with to inform them of the BSH concept and how it could assist what they do; this includes all 32 Scottish local authorities.
- 1.29 This engagement demonstrates that the pilot programme has reached out to all aspects of the construction sector and those involved in it.

2.0 The Building Standards Hub (BSH)

- 2.1 The following paragraphs provide an insight to how the proposed BSH will be structured, what it will do and how it will be directed and governed.

The Building Standards Hub (BSH)

- 2.2 The vision of the BSH is '**to support transformation and quality in building standards services across Scotland**'.

Its high-level objectives being:

- To support increased consistency nationally in building standards service
- To support increased capacity within building standards services
- To provide resilience to verifiers
- To support the drive for efficiencies
- To support investment in skills and new technology

- 2.3 The BSH will deliver on these objectives across three areas of work:

- By providing a range of building standards system services
- By supporting hubs of expertise and operational partnerships
- By supporting learning and development

BSH – Governance

- 2.4 The BSH will be hosted within a local authority as an embedded stand-alone unit. There will be agreed terms of appointment between that host authority and the Scottish Government.
- 2.5 The host authority will be responsible for the appointment and line management of staff and legal matters.
- 2.6 The BSH and staff will work to the host authority HR and corporate rules in terms of their employment regulation.
- 2.7 The BSH will manage its own specific budgetary and procurement arrangements within the host authorities own financial governance, adapted as necessary through the terms of appointment agreement.
- 2.8 Change management necessities to incorporate the BSH into the host authority will be managed by the host authority.
- 2.9 The BSH will be strategically directed by an 'Advisory Board', whose remit would also be to ensure the BSH is delivering as intended, review its annual business plan and performance.
- 2.10 The Advisory Board will be appointed by the Delivery Model Development Group (DMDG) prior to the BSH implementation. The reporting mechanism to Scottish Ministers being through the Advisory Board via the Building Standards Division (BSD). It is anticipated that the board would consist of 9 members, with representation coming from:

- The relevant host authority Head of Service/Manager. (1 No.)
- Local Authority Building Standards Scotland (LABSS). (2 No.)
- Building Standards Division (BSD) of Scottish Government. (2 No.)
- CoSLA/SoLACE. (1 No.)
- Certification Scheme Providers. (1 No.)
- Industry representatives. (2 No.)

2.11 To ensure wider industry stakeholders are represented, there will also be an 'External Stakeholder Group' which will act as a sounding board for the construction sector providing feedback on industry issues and the performance of the BSH. This group would also identify areas of collaboration and opportunity.

2.12 BSH participation and the stakeholder group may be incorporated within an existing industry group(s) to avoid duplication of work and resource.

BSH - Structure

2.13 The BSH will deliver its range of services and activities across 6 Business Units (BU), namely the:

- Business Unit (BU)
- Operational Partnership Unit (OPU)
- STAS Unit (SU)
- Technical and Procedural Unit (TPU)
- Digital Transformation Unit (DTU)
- Learning and Development Unit (LDU)

2.14 These units allow for clearer definition on activity areas covered by the BSH and will aid the synergies between the BSH and LABSS and other stakeholders.

2.15 There will be 10.5 FTE staff working within the BSH, namely:

- Two BSH Directors – strategy and operations.
- Learning and Development Manager
- Learning and Development Officer
- Three Technical Support Surveyors
- Two Expert Technical Support Surveyors – fire and energy/environment
- Administration and Technical Support Officer
- Administration and Technical Support Assistant (0.5 FTE)

2.16 Staff within the BSH will not be dedicated to any specific business unit and their skills and experience will be utilised across all functional areas.

2.17 BSH staff will be employees of the host organisation and designated home workers, as it is anticipated posts will be filled by candidates located across Scotland, and perhaps wider.

2.18 BSH staff will work under four main BSH work areas:

- Hub Management
- Training Development and Competence
- Technical Support
- Business Support

- 2.19 The structure and alignment of staff to operation of business units and work areas is shown in Appendix 1. The Building Standards Hub Governance/Services Diagram is shown in Appendix 2.

BSH – Building Standards System Services

- 2.20 The three main building standards system services that the BSH will provide are those services previously provided by LABSS on a voluntary basis transferring to the BSH.

These Services are:

- The Scottish Type Approval Scheme (STAS)
- Information Papers
- The Dispute Resolution Scheme

- 2.21 STAS is a national approval scheme that allows customers to have their building design, or system design pre-approved, which then quickens the building warrant application process as only site-specific elements require to be checked. This also aids verifiers as they spend considerably less time and resource assessing applications accompanied by a STAS certificate.

- 2.22 Through the BSH, the STAS scheme will be enhanced and actively promoted.

- 2.23 Information Papers provide guidance to verifiers, designers, developers and the public in areas, or covering topics where questions or issues have been raised, with respect to the meaning behind particular standards or processes.

- 2.24 Information papers promote clarity and national consistency on the subject matter covered. Through the BSH, the range of subject matter will be more comprehensively covered and managed.

- 2.25 The Dispute Resolution Scheme provides a facility to an applicant where they disagree with a technical or procedural interpretation that a building standards authority is adopting in the consideration of a building warrant submission, building project or proposed development through a preliminary enquiry.

- 2.26 Regional or national outcomes from dispute resolution cases are derived from verifier's decisions collated through their respective consortium group at regional level and through the CTWG with BSD consultation at a national level. Whilst decisions made are verifier led, the BSH technical support will provide greater ability for research to help direct decision and opinion. The BSH will also be the administration centre for the system.

BSH – Centres of Expertise and Operational Partnerships

- 2.27 The BSH will operate, manage, and support hubs of expertise and provide specialist advice to verifiers in the following areas:

- Fire engineering hub of experts
- Structural engineering hub of experts
- Specialist advice
- Environmental and energy expertise

- 2.28 The fire engineering and structural engineering hub of experts will facilitate and pull together panels of expertise from both industry and public sector to look at matters of national interest with a view to establishing a consistent position or opinion.

- 2.29 Matters of national interest could include a variety of matters for consideration, such as:
- Providing expert opinion as part of a review relating to fire and/or structure.
 - Providing expert opinion on a new and innovative product or system/method of construction in relation to fire and/or structure.
 - Providing expert opinion on nationally occurring construction / remediation matters in relation to fire and/or structure.
 - Provide expert opinion in relation to matters of ministerial interest in relation to fire and/or structure.
- 2.30 This drawing together of fire and structural expertise will also facilitate wider operational partnerships that will allow verifiers, through the BSH, to access opinion/peer review in other areas of fire and/or structural related building standards activity, including access to opinion/peer review on level 3 fire engineered design solutions.
- 2.31 The technical support surveyor staff and expert technical support surveyor staff within the BSH will provide a national centralised resource to be able to co-ordinate and research matters requiring specialist advice and the facility to publicise and distribute that advice to verifiers and industry.
- 2.32 The BSH environment and energy expert technical support surveyor will provide a national centralised support role, supporting verifiers and the building standards system services on matters related to the environment and energy, which are areas that will see rapid change and technological improvement over the coming years.
- 2.33 The BSH will manage, and co-ordinate strengthened regional partnerships to support the delivery of the building standards system on regulatory, procedural, process and transformational matters through the:
- Consortia Technical Working Group (CTWG)
 - The Digital Hub and LABSS Digital Delivery Group (DDG)
- 2.34 The BSH will also facilitate workload sharing between local authority verifiers in the assessment of building warrant applications.
- 2.35 The CTWG is the established means to co-ordinate national outcomes through technical and procedural interpretational matters. The BSH will coordinate this group as well as assist in its operation.
- 2.36 The CTWG is where the appointed seven consortia technical leads are brought together, representing all 32 LAs. Practitioner decision on national regulatory matters, practice and interpretation is decided through the CTWG and is formalised through the creation of information papers, guidance and dispute resolution case outcomes facilitated and produced by the BSH.
- 2.37 The Digital Hub is the communications and strategy conduit between stakeholders and verifiers through the LABSS DDG.
- 2.38 The Digital Hub supports the BSD digital transformation strategy and contributes to all national digital transformational matters and is incorporated into the BSH.
- 2.39 The Digital Hub interacts with several key stakeholders and experts and promotes a more co-ordinated and national approach to transformational matters. The Digital Hub also provides support to the LABSS DDG.

- 2.40 On a practical level, the Digital Hub assists in the research of emerging technological solutions that may benefit building standards system delivery, verifiers and stakeholders, such as the development of national guidance for remote verification inspection.
- 2.41 Workload sharing is a brokered introduction through the BSH for a LA who requires assistance in the assessment of building warrant applications with a LA whose business model is such that they are able to help.
- 2.42 The intent of this service is merely to make the introduction between parties. In addition, the BSH will provide a template for a workload sharing agreement and guidance on the same.
- 2.43 There would be no recommendations from the BSH, only an introduction. The BSH would not be undertaking any assessment of building warrant applications for LA verifiers.
- 2.44 The term 'operational partnerships' also covers the liaison and engagement that will exist in the daily operations of the BSH with LABSS, BSD and wider industry stakeholders.

BSH – Learning and Development

- 2.45 Training, competence, validation and re-validation are essential in ensuring that building standards' practitioners are suitably skilled and qualified to undertake their role. The BSH, through the Learning and Development Unit, will support a number of training initiatives, operate and manage digital training platforms and provide direct/indirect training for verifiers. Appropriate training may also be delivered to wider industry.
- 2.46 Areas of learning and development support provided by the BSH will include:
- Supporting competency assessment, validation and re-validation (CAS)
 - Delivering a Virtual Learning Environment (VLE) and Learning Management System (LMS)
 - Supporting LABSS ambassador's networks
 - Supporting modern and graduate apprenticeship schemes. Liaising and engagement with professional bodies and education institutions

3.0 Conclusions

- 3.1 The BSH Pilot has been successfully incorporated into Fife Council since May 2022 and through that hosting it has delivered on the pilot programme. In addition to this remit, the pilot has also provided and demonstrated real and practical improvement to the building standards delivery model to the benefit of verifiers and wider industry.
- 3.2 The success of this pilot, as well as the endorsements it has received, has led Scottish Government to approve the creation of a permanent BSH as an integral part of the building standards system moving forward.
- 3.3 Through SoLACE, Fife Council has been successful in being the selected authority to host the BSH. This presents Fife Council with the opportunity to be at the forefront of innovation in the hosting of national centres for expertise and resilience. The BSH concept may be considered by many other local authority disciplines as being a model to adapt for their services.
- 3.4 CoSLA have been fully appraised and consulted on the development of the BSH and endorse its creation and funding model.

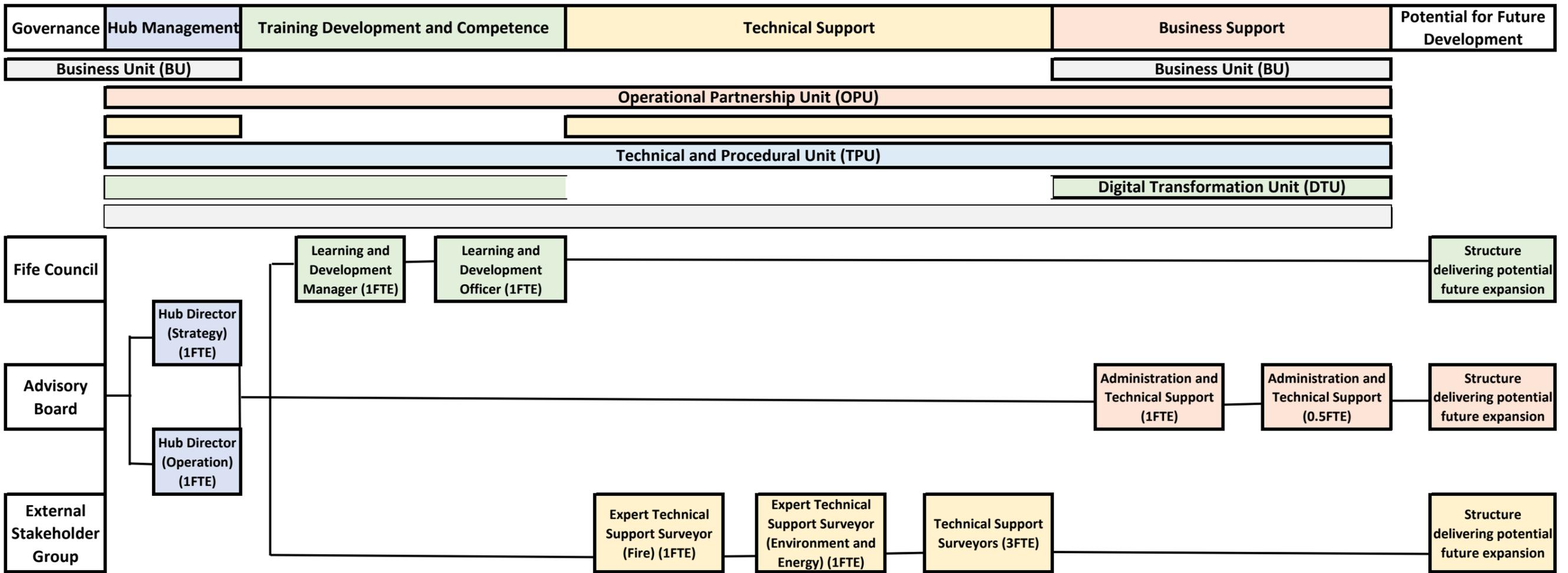
- 3.5 There are no costs or resourcing issues to Fife Council in the hosting of the BSH and all costs will be centrally funded from the Scottish Government, including funding increases in line with inflationary change.

List of Appendices

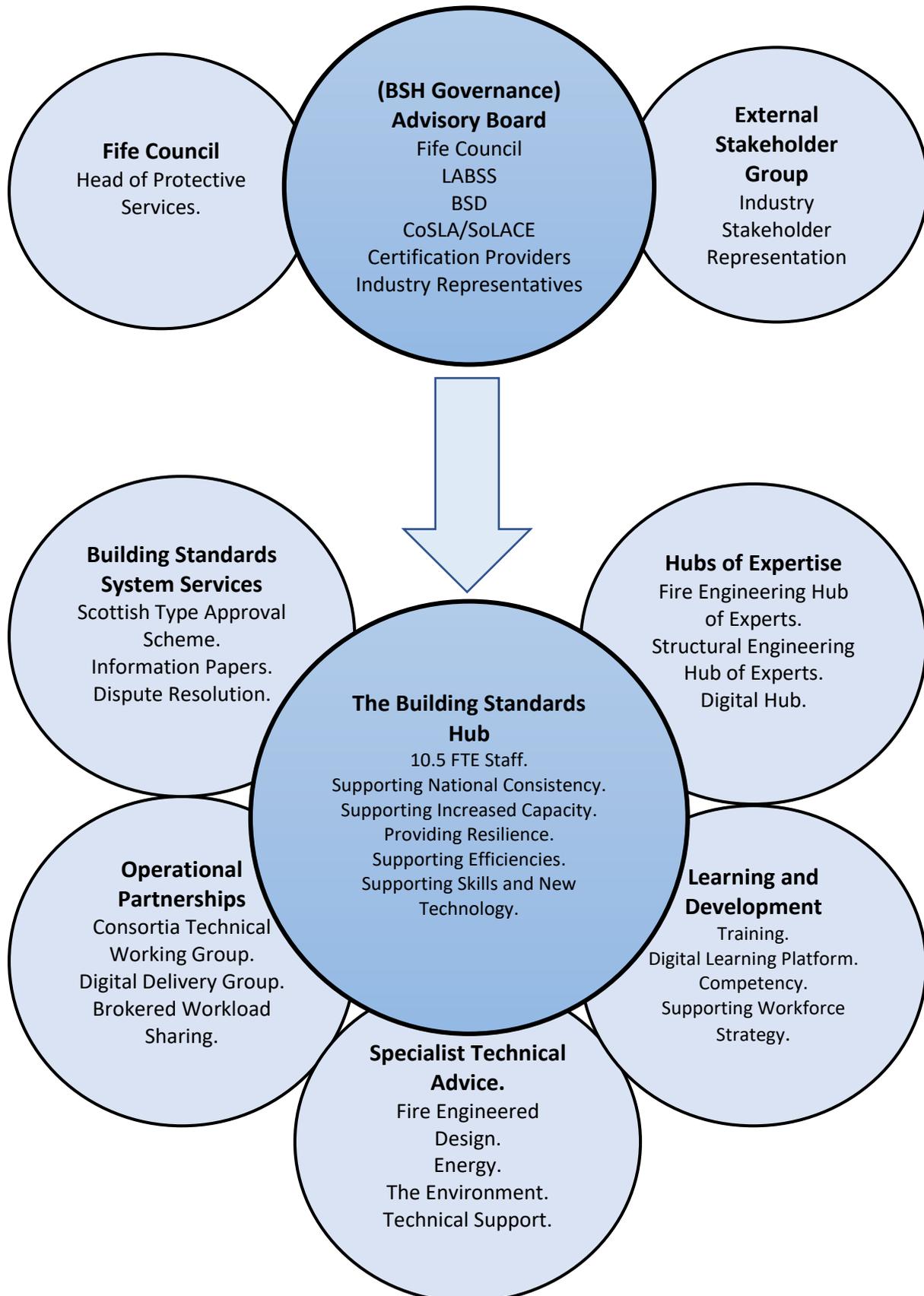
1. Building Standards Hub Structure Diagram
2. Building Standards Hub Governance/Services Diagram

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The National Building Standards Hub (BSH)



11 January 2024
Agenda Item No. 10

Fife's Homelessness Strategy 2024-27

Report by: John Mills, Head of Housing Services

Wards Affected: All

Purpose

This report follows an October 2023 Cabinet Committee report where members agreed to develop a comprehensive strategy and plan to reduce homelessness in Fife over the next three years.

Recommendations

Members are asked to:

- (i) agree the Homelessness Strategy 2024-27;
- (ii) note that the Strategy will be subject to ongoing review and development led by the Ending Homelessness Together Board and integrated into the Local Housing Strategy framework reported to the Fife Housing Partnership; and
- (iii) approve specific actions set out in Section 3 with a focus on legacy / backlog position to reduce pressure on temporary accommodation services with the caveat that external funding may be subject to change in future years and require review.

Resource Implications

The Strategy relies on estimated funding of £67.292m across 2024-27. There are a mix of funding sources required, including existing core budgets and external funding. These are recorded in The Action Plan and Resource Requirement Section. There are strategic actions which remain to be costed and the availability of funding to support these will be assessed before these progress.

The elements of the strategy currently funded from General Fund Housing and the Housing Revenue Account are currently operating within existing budgets.

The HRA Property Acquisitions Capital programme will help to support the acquisitions detailed in the paper. There is currently £16.5m available for acquisitions across 2023-26 which will support the purchase of 150 properties at an average cost of £110k per unit. Further funding beyond the £16.5m is still to be confirmed.

The HRA Affordable Housing programme will play a key part in ensuring delivery of the Strategy through new supply. Spending on the Affordable Housing Programme is currently approved up to year 2 of the Phase 4 programme. However, following the announcement of the Scottish Government's budget for 2024/25 on 19 December 2023, a cut of 26% to the Government support for the Affordable Housing Programme was confirmed. The council's resource planning assumptions for housing subsidy availability will be confirmed in the new year, but are likely to be reduced for 2024/25. This will have a negative impact on the number of new affordable houses the council and the Fife Housing Association Alliance to support homelessness needs.

The future of RRTP and Prevention funding for 2024-27, which is awarded by the Scottish Government, is still to be confirmed with funding letters expected in later January. The Scottish Government budget announced on 19 December has not changed the level of funding but the distribution mechanism has still be agreed. The Strategy has been drafted on the assumption that the current funding levels will be maintained at £2.450m.

A bid has been made to the Scottish Government for £1.6m additional funding as part of gaining grant to set up and organise a Private Sector Leasing Scheme to off set ongoing pressures in temporary accommodation. The timescale for funding to be assessed or approved is currently unknown.

There is existing Ukraine Tariff funding which has been received from the UK Government which is available to support Ukrainian Displaced Persons. The Strategy will maximise the use of this funding wherever guidance allows.

Legal & Risk Implications

Fife is continually at risk of breaching statutory duties to provide temporary accommodation as well as the Unsuitable Accommodation Order. The situation has been reported to People and Communities Scrutiny Committee and to the Scottish Housing Regulator. The SHR published a statement in respect of Homelessness Services in Scotland in December 2023 highlighting the systemic failures nationally.

Impact Assessment

Fife and other local authorities are experiencing significant pressures on housing and support services which is being escalated through Convention of Scottish Local Authorities (CoSLA), Society of Local Authority Chief Executives (SOLACE) and Association of Lead and Chief Housing Officers (ALACHO). An EQIA has been carried out and appended to this report which will be subject to ongoing monitoring and review as part of the strategic process in accordance with council policy.

Consultation

The Strategy has been developed in consultation with the Ending Homelessness Board and involvement through an Elected Member Workshop.

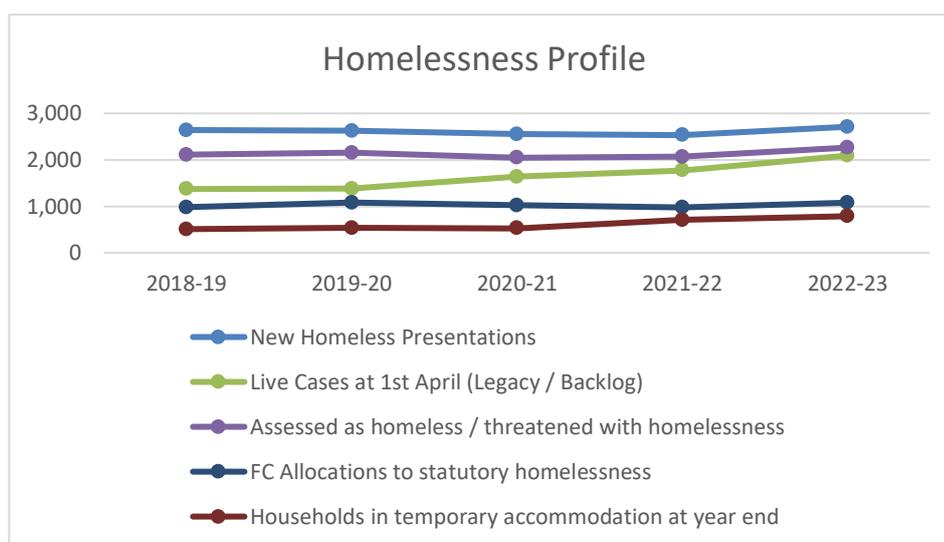
1.0 Introduction

- 1.1 The improvement of homelessness services has been focussed by Fife's Rapid Rehousing Journey, initiated in 2018. Fife's Rapid Rehousing Transition Plan (RRTP) set out five main ambitions and progress has been made. The Strategy aims to build on the RRTP and broaden the focus toward a strongly preventative approach involving other services and partners.
- 1.2 The Homelessness Strategy is written within the context of an increasingly complex world environment and Fife Partners are continuing to support proportionately large numbers of people from Ukraine in insecure hotel, host and sponsor arrangements. There are over 400 individuals in this situation and it is likely that around a quarter may require some form of housing or homelessness assistance utilising the Tariff funding which has been provided and held in Fife Council's budget. The Strategy will help to ensure the use of Homes for Ukraine Grant Funding is maximised and support a scheme to assist Ukrainian Displaced Persons as part of a longer-term strategy to limit impact on allocations and homelessness.

2.0 The Current Fife Position

- 2.1 The October Cabinet Committee report highlighted the housing pressures that exist across the country and provided reference points to a national evidence base. Since then, members have been provided with results of a recent survey by The Association of Lead and Chief Housing Officers (ALACHO) highlighting 15 local authorities reporting 'red' status in meeting homeless duties. Members may also be aware that three local authorities have now formally declared a housing emergency (Argyll and Bute, Edinburgh and Glasgow).
- 2.2 Although Scottish Government remain committed to the Ending Homelessness Together Action Plan, the next stage of the RRTP strategic and resourcing journey remains unclear. While officers are confident that progress is being made, the statistics show that focussed action is required to address the unmet needs and prevent future homelessness presentations. Fife's position is summarised as follows:-

- Reductions in housing supply over the last three years have meant an increase in the number of households assessed as homeless and waiting for a tenancy. At present, this is around 1,900 households.
- Following a period of gradual decline in homelessness presentations, these figures have started to increase with a 7% upturn in homelessness presentations during 2022/23. The cost of living crisis and a range of other factors known to cause and increase homelessness means that concerted action is required to prevent homelessness. This relationship is shown in the Graph below:



- The number of households generally and, specifically households with children, is at an all time high since records began. These numbers are reducing in Fife but there are still around 1,000 households and 380 children in temporary accommodation on a nightly basis in Fife.
- There is a broad range of evidence that confirms the adverse effect of homelessness and housing vulnerability on households which relate to education, employment, mental and physical health as well as a range of other negative impacts. There has been no specific research on this in Fife, but national research confirms that homelessness has implications for a range of council, health and social care as well as other services.
- While the vast majority of households that make a homelessness presentation have no specific needs, there is a number of households that require accommodation and housing support options such as Housing First.

3.0 Strategy Overview

3.1 The Approach is outlined in detail within the appended Strategy. This section highlights the key priorities contained within the document.

While the Ending Homelessness Strategy takes a strategic focus aligned to the other LHS Themes, approval is being sought for specific actions to address the needs of those currently in temporary accommodation or waiting for a permanent home:

- A continued housing allocation focus on homelessness derived from a tenant transfer led approach to generate increased turnover. This would generate around 1,350 housing allocations to statutory homelessness needs, linked to a further 250 allocations through the Fife Housing Register partnership. From a Council perspective, this will require continued focus on the Void Service Improvement Plan to ensure rapid turnover of available properties within existing budget.
- The development of a revised Private Sector Leasing Scheme aiming to generate 100 new temporary tenancies by April 2025, releasing properties to social allocations in 2024/25. This would be upscaled to 300 properties by 2027 as part of the Temporary Accommodation Strategy and would be a hybrid scheme addressing the needs of homelessness and, would be funded through existing Ukrainian funding and an additional £1.6m awaiting approval by Scottish Government.
- A specific commitment within a revised Housing Acquisitions Policy to identify 50 properties for homeless households where needs cannot be met through turnover or there are specific needs.
- An ongoing annual commitment to ‘flip’ 100 temporary tenancies as permanent homes, with replacement temporary tenancies identified to ensure provision reflects local needs. The replacement strategy is estimated to cost around £550k which has been funded by SG funding for the last 4 years, any reduction in homelessness funding nationally would require the Council to find alternative funding sources or review the strategy.
- Develop relationships with Fife Private Rental Solutions, managed by Trust in Fife and the wider sector, to increase and improve access to high quality, secure homes in the Private Rented Sector for 200 homeless households per year which would be managed within the existing core / service commissioning budget.
- Develop further exploratory work to establish a scheme to increase the number of long-term empty private sector homes to be brought into use as affordable homes. While Fife has a positive reputation for work to bring empty homes back into use, it is felt there is more potential in this area should further investment capacity become available, work within the first year of the Strategy will help to scope this gap.
- Focussed case management and systems review to households moving on from temporary accommodation as quickly and sustainably as possible with access to practical help and support where required. This is based on lessons learned from the reaction to the Sheriff Court judgement and will provide an additional focus to address the backlog through the recruitment of 2 additional case management professionals.
- Continuing to increase supply through the Local Housing Strategy ‘More Homes in the Right Places’ and ‘Suitable Homes’ Priority areas. This element of the Strategy will rely on the supply of houses which will be impacted by the continuation of the affordable housing programme. The New Build Affordable Housing: Proposed Phase (2024-29) Programme Options approved by Cabinet on 6th April 2023 noted the issues of the mismatch in supply and demand.

- 3.2 The Strategy sets out a clear performance management framework and indicators to track progress through a dashboard type approach with any exception monitored by the Ending Homelessness Together Board as chaired by the Executive Director (Communities). Progress will be reported annually through the service performance reporting framework. There are currently 1900 homeless households awaiting a home. The table below outlines which element of the Strategy will be used to support a reduction in the current the number of homeless households.

<i>Homeless Households currently awaiting a home</i>	<i>Actions</i>
1350	FC Allocations
250	RSL Allocations
100	Conversions (Temporary Tenancies flipped to permanent homes)
100	Private Sector Leasing as a hybrid response to resettlement and homelessness
100	Private Rented Sector Funding for Deposits / Guarantees
50	National Acquisitions Policy
100	2 x additional FTE Case Management Professionals
1900	

Developing a Homelessness Prevention Approach

- 3.3 While these measures will have a practical impact in the short-term, and will support Fife’s journey to ‘rapid rehousing by default’, there is a wider need to develop a more preventative approach in tandem with meeting statutory duty. This will develop more holistic approach to housing options with specific actions focussed on those most at risk of becoming homeless. Further work required to establish costs and resourcing requirements in relation to a number of these strategic development areas that aren’t being reported to Cabinet at this stage. This is also necessary preparation in advance of the anticipated Public Sector Prevention Duty to be incorporated into a forthcoming Housing Bill in 2024. This needs to take a whole systems approach to homelessness prevention, aligned to the council’s No Wrong Door approach to vulnerability.
- 3.4 Developing an effective prevention and early intervention approach as a Fife Partnership as outlined in the Strategy will enable the following benefits by 2027:-
- Improved housing outcomes for those at risk of homelessness and all of the associated adverse effects on life circumstances and opportunities
 - Pathways which allow individuals and households to exercise choice around their housing journeys with homelessness operating as a safety net
 - Development of a comprehensive temporary accommodation management strategy to manage reduction and response to local and strategic need over time
 - Opportunities to re-balance housing allocations, linked to a revised allocations approach, to ensure policy reflects local needs and makes best use of housing stock
 - Redesigned housing support and commissioned services providing tenure neutral support to vulnerable households
- 3.5 Delivery of the Strategy will be monitored by the Ending Homelessness Together Board using the monitoring dashboard stated in the Strategy document. If any funding sources cease or reduce, the Strategy will be reviewed to ensure best use of available resources and reported to Committee as required.

4.0 Conclusions

- 4.1 Increasing housing supply is critical to responding to the legacy needs of statutory homeless households and improving outcomes for people in fragile housing circumstances in the future. Fife is well placed to build more homes and improve access to a range of housing options through the relevant LHS Themes and the Strategy focusses on the improvement of homelessness and prevention services.
- 4.2 The October report and Members' Workshop highlighted positive progress has been made but development of the Strategy is intended to ensure a strategic partnership approach to preventing homelessness, ensuring any experience of homelessness is short and non-recurring by effectively linking housing and support services.

John Mills
Head of Housing Services

List of Appendices

1. Draft Homelessness Strategy 2024-27

Report Contact:

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Service Manager Housing Access
Email: gavin.smith@fife.gov.uk

Equality Impact Assessment

Part 1: Background and information

Title of proposal	Homelessness Strategy 2024-27
Brief description of proposal (including intended outcomes & purpose)	The Homelessness Strategy recognises the significant pressures on the housing access and homelessness system. The Plan sets out a series of Policy and resourcing positions which will require external support to ensure compliance with statutory duties and improve customer experience.
Lead Directorate / Service / Partnership	Ending Homelessness Together Programme Board
EqIA lead person	Gavin Smith, Service Manager, Housing Access
EqIA contributors	Key Representatives of Fife Partnership including Voluntary Sector representatives
Date of EqIA	November 2023

How does the proposal meet one or more of the general duties under the Equality Act 2010? (Consider proportionality and relevance on p.12 and see p.13 for more information on what the general duties mean). If the decision is of a strategic nature, how does the proposal address socio-economic disadvantage or inequalities of outcome?)

General duties	Please Explain
Eliminating discrimination, harassment and victimisation	Ensuring equality of opportunity for all households in vulnerable and fragile housing circumstances including those that become homeless unavoidably
Advancing equality of opportunity	Recognises that homelessness and housing vulnerability can impact on education, employment and social opportunities. Preventing and resolving homelessness aims to promote life opportunities and mitigate the potentially damaging impacts of homelessness
Fostering good relations	Creating opportunities to promote a no wrong door and case managed approach to those facing homelessness
Socio-economic disadvantage	Similar to Advancing Equality of Opportunity
Inequalities of outcome	Take a targeted approach to recognise that some communities may be more likely to become homeless than others and develop services and approaches that respond to different life circumstances

Having considered the general duties above, if there is likely to be no impact on any of the equality groups, parts 2 and 3 of the impact assessment may not need to be completed. Please provide an explanation (based on evidence) if this is the case.

The Strategy aims to improve access to services and welfare support to all and ensure statutory duties are met. The Strategy recognises that some society groups may be more likely to experience homelessness and the adverse impacts associated with housing vulnerability directly and indirectly. The groups most likely to experience homelessness and housing vulnerability are people experience domestic abuse, care experienced young people, those with a history of offending, veterans and people leaving other institutional settings such as hospitals. There is emerging evidence in the growth of LGBT and gender identity increasing within those at risk of homelessness and this is being monitored.

Part 2: Evidence and Impact Assessment

Explain what the positive and / or negative impact of the policy change is on any of the protected characteristics

Protected characteristic	Positive impact	Negative impact	No impact
Disabled people	X		
Sexual orientation	X		
Women	X		
Men	X		
Transgendered people	X		
Race (includes gypsy travellers)	X		
Age (including older people aged 60+)	X		
Children and young people	X		
Religion or belief	X		
Pregnancy & maternity	X		
Marriage & civil partnership	X		

Please also consider the impact of the policy change in relation to:

	Positive impact	Negative impact	No impact
Looked after children and care leavers	X		
Privacy (e.g. information security & data protection)	X		
Economy	X		

- Please record the evidence used to support the impact assessment. This could include officer knowledge and experience, research, customer surveys, service user engagement.
- Any evidence gaps can also be highlighted below.

Evidence used	Source of evidence
1. Homelessness Prevention Strategy Group Papers and Task and Finish Group Reports – Temporary Accommodation and Prevention	T&F Group Final Reports
2. Homelessness Research	Crisis – 75 Ways to Prevent Homelessness, Crisis Annual Returns, SG Statistical Bulletins and Research Programme, CIH Resources
3. Housing in Scotland – Current Context and Preparing for the Future – July 2023	Housing in Scotland Current Context and Preparing for the Future - July 2023 (solace.org.uk)
Evidence gaps	Planned action to address evidence gaps
1. Housing and Support Needs Assessment of the Homelessness Community was last completed in 2021. Action to update the Research needs to be considered by the Board	Board to consider updating the Strategic Needs Assessment
2. Evidence around the impact of homelessness on the LGBT community is a gap	Work with local providers following Frontline Fife Research

Part 3: Recommendations and Sign Off

(Recommendations should be based on evidence available at the time and aim to mitigate negative impacts or enhance positive impacts on any or all of the protected characteristics).

Recommendation	Lead person	Timescale
1.		
2.		
3.		
4.		
5.		

Sign off

(By signing off the EqIA, you are agreeing that the EqIA represents a thorough and proportionate analysis of the policy based on evidence listed above and there is no indication of unlawful practice and the recommendations are proportionate.

Date completed:	Date sent to Community Investment Team: Enquiry.equalities@fife.gov.uk
Senior Officer: Name	Designation:

FOR COMMUNITY INVESTMENT TEAM ONLY

EqIA Ref No.	
Date checked and initials	



HOMELESSNESS STRATEGY 2024 - 2027



1.0 The Purpose

This Strategy sets out the actions the Ending Homelessness Programme Board will take to reduce homelessness in Fife.

1.1 Scoping the homelessness issue

Fife is currently experiencing significant pressures on homelessness services due to a number of factors:

- Increasing presentations from households in vulnerable housing circumstances within the context of a progressive housing / human rights legislative programme
- Decades of underinvestment in new affordable housing supply and a dynamic housing market environment
- An increase in causal factors driving homelessness, including financial inequality, relationship breakdown (specifically abusive relationship breakdown), links with the criminal justice system and substance misuse have been more clearly evidenced.

1.2 Impact on the Strategy

There are a number of factors which are likely to impact the Strategy:

- Increasing pressures on other public services such as the care system, criminal justice system and hospitals
- Potential impacts of resettlement and humanitarian schemes with a number of households currently residing in fragile and insecure accommodation situations
- Changes to 'protections' and a changing legislative environment within the private rented housing market

The Ending Homelessness Board will maintain an active Risk Register and Risk Management approach with exceptions reported to Scrutiny or Cabinet Committee as required.

1.3 Defining the issue

This Strategy is prepared within the context of a complex social, economic and environmental context with the post pandemic period and other factors continuing to stimulate homelessness. This Strategy does not rehearse the pressures on the housing systems as these were set out in the <https://solace.org.uk/housing-in-scotland/> Report. This was also supported by the Scottish Housing Regulator's Thematic Study and Statement issued in December 2023 highlighting the systemic issues and barriers affecting housing access and homelessness services.

The context in Fife:

- Over 1,800 households assessed as statutorily homeless waiting for a permanent home (known as "backlog or legacy").
- There are around 800 households in temporary accommodation at any time. This includes around 380 children with the number steadily declining post pandemic.
- Homelessness presentations are increasing annually and just over 2,700 households presented to the Council in 2022/23. Around 86% are deemed to be in priority need with 14% helped to remain or assisted to find an alternative housing route. These statistics have been steadily increasing over the years in line with changes to homelessness legislation.
- The collective housing allocations capacity of the Fife Housing Register partnership is around 1,300 tenancies per year. Duty to around 100 households per year is

discharged in the private rented sector with other households losing contact with services or withdrawing in other ways. This creates a crude deficit of 600 statutory housing needs per year.

- The vast majority of households accepted as homeless (around 86%) have no support or specific needs. A minority have very complex needs and there is a spectrum of support and other needs presented by individuals / families claiming homelessness.

2.0 The Vision

Homelessness is prevented where possible, where unavoidable the experience is short with minimum transitions and non-recurring.

The Board will implement the Strategy using a RAG analysis technique to appraise progress and remain agile to emerging trends, funding decisions and other dynamic factors.

Objectives and Milestones

- The backlog of need is reduced to 1,000 by April 2025.
- Homelessness presentations reduce by 10% per year due to more effective early intervention and prevention partnership activity.
- The number of homeless households deemed to be in statutory need is reduced by 10% per year through high quality housing options advice, prevention and alternative priority housing pathways.
- More tenancies are sustained across the social rented and private rented sectors by enhanced tenancy sustainment activity and effective housing support and supported housing options.
- Housing supply is increased by enhancing housing allocations to generate 1,400 housing opportunities per year across the Fife Housing Register Partnership with the Council continuing to pursue a transfer led approach. Housing supply is driven through the SHIP and LHS Theme More Homes in the Right Places.
- Housing supply is further increased by accelerating the Housing Acquisitions Programme to 100 properties per year, increasing focus on long term empty homes in the private sector and increasing access to the private rented sector to enable 200 households to settle in the sector per year.

3.0 Action Plan

While homelessness is a complex and can affect a range of households there are three key areas of focus (Appendix 1).

3.1 Increase Supply to make homelessness short

- Ensuring a range of housing options for a spectrum of housing needs to ensure an adequate supply of housing and housing with support options.
- Fife will remain committed to the Affordable Housing Programme to maximise new build delivery through the Strategic Housing Investment Programme.
- Accelerate acquisitions to provide 100 more units each year subject to annual review.
- Increase access to the Private Rented Sector to promote access for those seeking to access housing as a preventative measure and to discuss duty for 200 households assessed as statutorily homeless.
- Invest in a Private Sector Leasing Scheme to provide temporary accommodation and release 100 units of temporary accommodation back into social rented stock each year of the Strategy. This will be augmented by 100 scatter flat conversions to reduce transitions for homeless households.

- The Fife Housing Partnership will aim to bring 50 long term empty homes in the private sector back into use as social rented housing or affordable housing.

3.2 Maximise Prevention through Partnership

- Developing collaborative partnership arrangements through local multi-disciplinary teams with a focus on prevention and early intervention. This approach is being supported by Turning Point Scotland investment building capacity in local services and a number of test of change projects.
- Enabling housing officers to respond to local needs through delegated budgets to prevent homelessness presentations.
- Preventing homelessness in the private rented sector through early intervention, prevention with support to landlords and tenants.
- Developing priority pathway housing journeys for those most at risk of homelessness from the care system, criminal justice system, health systems and those experiencing abuse or harassment within the home.
- Continuing to upscale the Housing First Programme, providing 115 live tenancies at any time with a focus on those most likely to experience repeat homelessness.

3.3 Track Legislative change and meet statutory duties

- Developing a longer-term temporary accommodation strategy by September 2023 setting out a clear direction of travel for emergency, interim and supported accommodation options which meet local needs.
- Recommissioning accommodation, support and wider services by March 2026 to update and modernise Fife services.
- Replacing buildings that are no longer fit for purpose with modern facilities which fit the Council's aim for no wrong door / whole systems approach to needs assessment and response.
- Carry out regular reviews of frontline services, developing accreditation and quality assurance in line with National Standards.
- Carry out a review of Fife's approach and policy to housing access during 2024 to put customer experience at the heart of service delivery.

4.0 Action Plan & Resource Requirement

To support the Homelessness Strategy priorities there are budget and resource requirements covering the 3 year strategy. This is an agile action plan and review of progress and governance of the action plan is the responsibility of the Ending Homelessness Together Programme Board, feeding into the Local Housing Strategy (2022/27) and Plan for Fife (2017/27), while linking in with the priorities of other key strategies in Fife. Below each priority includes actions which will reduce the backlog, support preventing homelessness, making homelessness short and non-recurring. Some actions have budget requirements and others can be progressed as part of teams workplans (Appendix 1- Route map)

Priority 1 – Preventing Homelessness

Actions (LHS- links to section 5.5 Strategy in Local Housing Strategy)	Expected Funding Source	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)	Total (£m)
Utilise a whole system approach , collaborating to better understand challenges faced by people threatened with homelessness and identify collective actions and make best use of resources available	RRTP & Prevention	0.090	0.090	0.000	0.180
Support provided to those fleeing domestic abuse by funding furniture storage/providing goods needed to set up a home	RRTP & Prevention	0.050	0.050	0.050	0.150
Prevent rent debt evictions in Private Rented Sector by providing funding to individual landlord/tenant to reduce or clear debt. Payment plans set up to recover fund (LHS)	RRTP & Prevention	0.050	0.050	0.050	0.150
Easy to access budget available to area housing teams to prevent homelessness	RRTP & Prevention	0.100	0.100	0.100	0.300
Commissioned Services to prevent homelessness includes providing general housing advice and support, legal support, support to young people, advice & support to migrants	GFH Core Budget & RRTP & Prevention	1.206	1.206	1.206	3.618
Upstream Project in High Schools creates opportunities to reach vulnerable young people and their families before they reach crisis	RRTP & Prevention	0.050	0.050	0.050	0.150
Test of Change – Hospital Navigator (HSCP/ADP) Service based in Victoria Hospital to engage with people before alcohol/drug issues spiral and impact on their ability to maintain their home.	RRTP & Prevention	0.070	0.000	0.000	0.070
Test of Change – Community Link Worker (HSPC/Locality) Providing a pathway for GPs/Health professionals to refer patients with non-clinical concerns that are at risk of or are homeless	RRTP & Prevention	0.023	0.000	0.000	0.023

Actions (LHS- links to section 5.5 Strategy in Local Housing Strategy)	Expected Funding Source	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)	Total (£m)
Test of Change – Dedicated Addiction Worker (HSCP/ADP) Providing integrated addiction services within the current housing support structure e.g Housing First and upskilling current Housing Support Team to recognise and refer tenants	RRTP & Prevention	0.053	0.000	0.000	0.053
Test of change - Mediation Service targeted at non-violent relationship breakdown to help reduce the amount of homeless assessments from this customer group	RRTP & Prevention	0.100	0.100	0.100	0.300
FPRS to engage with homeless households that move into Private Rented Sector to ensure income max, support needs and contact if circumstances change	GFH Core Budget	0.217	0.217	0.217	0.650
Staffing cost supporting business change	RRTP & Prevention	0.875	0.875	0.875	2.625
Future projects or increase capacity	RRTP & Prevention	0.000	0.099	0.189	0.288
Total budget requirement for Priority 1		2.884	2.837	2.837	8.557

Projects and areas of work not requiring specific budget	
Pilot -Section 11 early intervention to prevent evictions	Better use of LIFT (Low Income Family Tracker) data to target campaigns towards tenants on low incomes
Review Membership of EHT Board and develop a resource map of services currently provided to support collaboration of homelessness prevention	Use the 4DX (4 Disciplines of Execution – Focus, act, engagement, accountability) approach to focus on improving customer service (LHS)
Develop Inter-agency Priority Pathway Protocols for all Priority Groups to ensure engagement with all relevant services and organisations	Develop a method to enable engagement with those with lived in experience to be involved in developing homelessness processes/services
Develop an Information Sharing Protocol to enable services to jointly support individuals	Housing Option Hub Module 1 training to be completed by all Housing Option Officers to support their engagement in prevention
Review feasibility of Choice Based Lettings bidding scheme as an alternative to Fife’s current allocation process	Awareness raising across teams/partners/elected members to support the overall vision to end homelessness together
Review and modernise the current Allocation Policy to ensure it meets housing demands and prioritises housing need	Area Letting Plans to be approved by area committees and include Priority Pathway group quotas supporting allocations to these groups (LHS)
Communication Campaign to raise awareness of housing options, reduce stigma related to homelessness and engage with the people of Fife to gain their support	Housing Advice Accreditation across partner services – including training, tools & resources to support employees to improve quality and consistency of advice provided (LHS)
Review the digital offering to customers to ensure that those that choose this method of contact gain quality advice and guidance to make informed decisions	

Priority 2 - Securing that sufficient and range of accommodation is available for people who are or may become homeless

Actions (LHS- links to section 5.5 Strategy in Local Housing Strategy)	Expected Funding Source	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)	Total (£m)
Implement the Voids Service Improvement Plan to support faster turnover of properties and allocation to new households	HRA Core Budget	8.125	8.125	8.125	24.375
Establish Long Term Accommodation Strategy to support resettlement and minimise impacts on homelessness services	Existing Ukraine Tariff Funding	TBC	TBC	TBC	0.000
Continue the Affordable Housing Programme to support the provision of new build properties right size, type and in right places across Fife (LHS Theme)	HRA Affordable Housing Programme	TBC	TBC	TBC	0.000
Property acquisition programme to purchase housing in the open market to support increased supply of social housing	HRA Acquisitions Programme	5.500	5.500	5.500	16.500
Range of initiatives to bring back into use Long Term Empty Homes (LTEH) supporting increased housing supply	GFH Core Budget	0.050	TBC	TBC	0.050
Fife Private Rental Solutions provide an Ethical Letting Agent service to landlords/letting agents to help them address issues with tenants	GFH Core Budget	0.217	0.217	0.217	0.650
Commissioned Services providing supported accommodation and assertive outreach	GFH & HRA Core Budget	2.574	2.574	2.574	7.722
Allocating temporary accommodation that is of the right size/type, location to enable a secure tenancy to be created and reduce tenant moves – rapid rehousing	RRTP & Prevention	0.550	0.550	0.550	1.650
As part of Temporary Accommodation Strategy reprovision Hostels to better support those in temp accommodation (LHS) - Costing to be confirmed through further work with finance.	Mixed Funding Sources - TBC	TBC	TBC	TBC	0.000
Encourage Private Landlords to remain in the private sector, by providing an attractive Private Sector Leasing Scheme that supports affordable rental properties as a housing option	Request pending with Scottish Govt	0.533	0.533	0.533	1.600

Actions (LHS- links to section 5.5 Strategy in Local Housing Strategy)	Expected Funding Source	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)	Total (£m)
Review demand for converting some 2 bedroom properties into shared accommodation with own private room, to make best use of existing 2 bedroom properties	HRA Capital Budget	TBC	TBC	TBC	0.000
Total budget requirement for Priority 2		17.549	17.499	17.499	52.547

Projects and Areas of work not requiring specific budget	
Develop Temporary Accommodation Strategy to better plan to support the needs of those requiring temporary accommodation	Mechanism to record rent pressure zones to enable Fife to inform SG and support localised approaches in areas with high rents (LHS)
Making best use of existing housing stock and reduce the need to move from home, Community OT involvement to support adaptations where possible	Review landlord support requirements to ensure that they know their responsibilities and can support tenants to sustain tenancies
Minimise Children in temporary accommodation by early intervention and preventing homelessness (LHS)	Support needs assessment included as part of Personal Housing Plans to help transition to permanent tenancies and support sustainment (LHS)
Develop Empty Homes Strategic Framework (LHS) to further support using initiatives to bring properties back into use	Investigate the use Compulsory Purchase Orders to enable housing improvements for empty properties (LHS)

Priority 3 - Providing support for people who are or may become homeless, or need support to prevent them becoming homeless again

Actions (LHS- links to section 5.5 Strategy in Local Housing Strategy)	Expected Funding Source	2024/25 (£m)	2025/26 (£m)	2026/27 (£m)	Total (£m)
Housing First for under 25s, with wrap around support for vulnerable people with multiple complex needs (LHS)	RRTP & Prevention	0.436	0.436	0.436	1.308
Housing First for other groups, with wrap around support for vulnerable people with multiple complex needs (LHS)	GFH Core Budget	0.010	0.010	0.010	0.030
Commissioned Services providing Short Term Housing Support (STHS)	GFH Core Budget	1.502	1.502	1.502	4.506
Starter packs provided to new homeless households moving from temporary accommodation to ensure they have the basics to help them settle into their new home -sofa, bed, white goods, floor coverings	RRTP & Prevention	0.050	0.050	0.050	0.150
Fast tracking Community Care Grants to help ensure those eligible have the goods and furniture needed when they move into a tenancy	RRTP & Prevention	0.065	0.065	0.065	0.195
Total budge requirements for Priority 3		2.063	2.063	2.063	6.189

Projects and Areas of work not requiring specific budget	
Pilot – Housing Management Officer completing benefit checker in NEF & Cowdenbeath to support income maximisation	Review how assertive outreach can be developed further linked to WSA and supporting those that are harder to engage with
Pilot – Housing Management Officer calling tenant with arrears to try to find out if any other issues that have resulted in arrears to help support	Further develop the Naumann Initiative to encourage other partner organisations to engage and give a homeless person employment
Review support hours and services provided across all commissioned services as part of the monitoring framework to ensure support needs are met	Development of Strategic Single Shared Assessment to enable one assessment and shared response to support customer Integrate employability into support discussions and a referral as a means to support development, training and employment

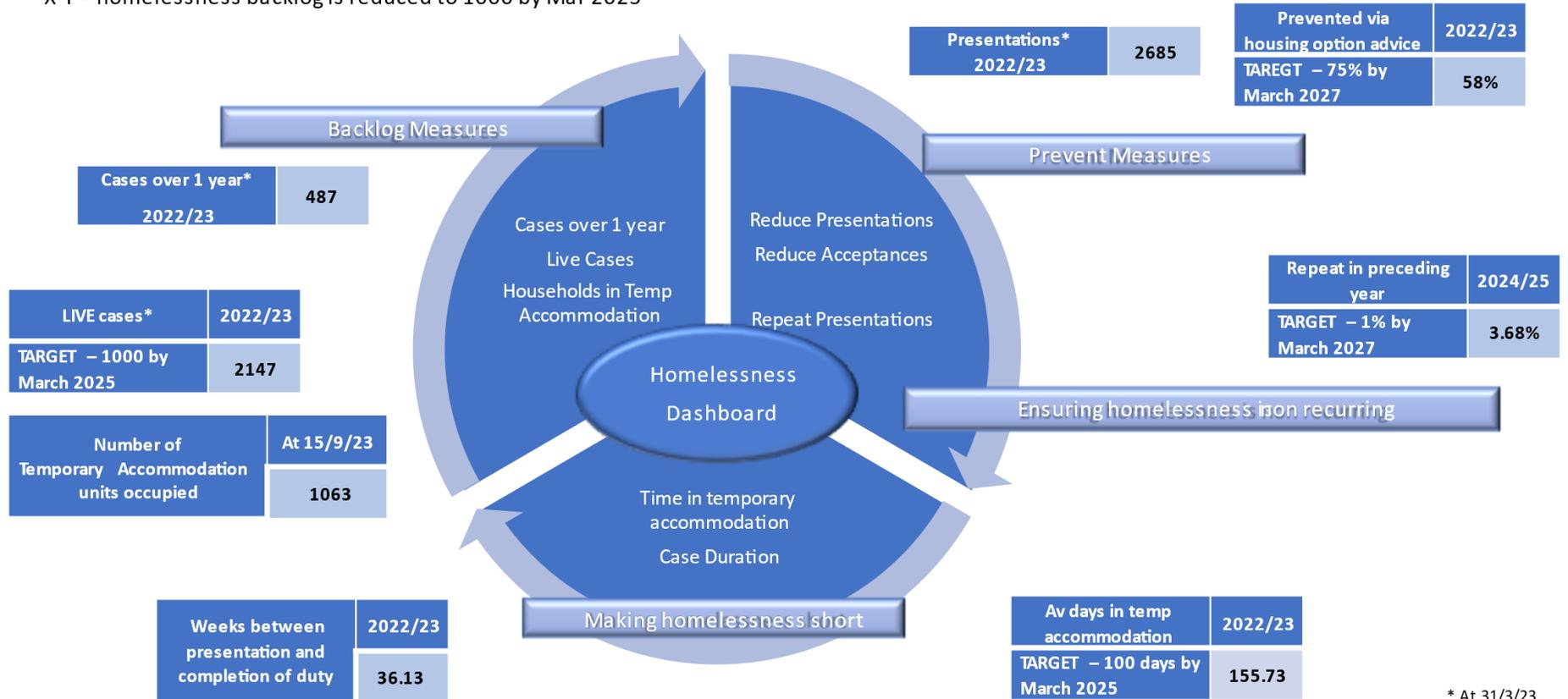
5. Governance and Monitoring

The Ending Homelessness Together Programme Board is responsible for governance of the Strategy. The Board meet every 6 weeks, where risks, challenges or issues will be discussed. Performance reports together with the project plan and budget monitoring are crucial to tracking progress and supporting an agile strategy to prevent homelessness. The performance measures form a dashboard that relate to the three priorities.

Indicators	2022/23	Q2 2023/24	Q1 2023/24 Previous Q	Q2 2022/23 Last year
Homeless Cases Prevented through housing option advice (CDHS 030) TARGET – Increase households prevented from homelessness to 75% by March 2027	58%	61%	68%	49%
Number of new homeless presentations (CDHS 021)	2685	687	628	727
Number assessed as homeless/threatened with homelessness (CDHS LAP F4a)	2144	536	442	563
LIVE Cases (CDHS 029) TARGET - Reduce backlog of homeless cases to 1000 by March 2025	2147	2022	2122	2182
Number of children experiencing homelessness in temporary accommodation (CDHS 023) TARGET - Minimise children in temporary accommodation to 250 at any time	553	414	472	514
Average days spent in Temporary Accommodation (LA only) (CDHS 25) TARGET -Reduce time spent on temporary accommodation to 100 days by March 2025	155.73 (end Q4)	154.9	178.73	142.00
Repeat Homelessness cases in preceding year (CDHS LAP F 4) TARGET – Reduce repeat homeless presentations to 3% by Match 2025 & 1% by March 2027	3.68%	3.63%	3.5%	4.26%
Percentage of households placed in B&B type accommodation (CDHS 034) TARGET -Reduce B&B/Hotel type accommodation to be less than 3% of total Temp accommodation by March 2027	22.68%	24.2%	27.66%	12.37%
Average time taken to relet property (Days) (Power BI)	49.86	51.62	50.66	45.85
Number of new affordable homes provided through phase 3 of Affordable Housing Programme (CDHS 079)	583	124	234	172
Number of property acquisitions (CDHS 106)	113	13	29	17
Number of long term empty homes returned to housing use (CDHS 062)	62	11	9	13
Number of new build house let (CDHS C2h)	102	30	23	10

Homelessness Measurement

X-Y – homelessness backlog is reduced to 1000 by Mar 2025



* At 31/3/23

The Ending Homelessness Together Programme Board will develop the dashboard and keep it under review throughout the period of this strategy.

Appendix 1 – Route Map to Ending Homelessness Together in Fife

Increase Supply to meet existing needs	Increase Prevention
<ul style="list-style-type: none"> • Maintain a transfer led, housing homelessness allocations focus for 2 years – review allocations policy and approach in 2024 • Maximise the Affordable Housing Programme • Implement Private Sector Leasing to release 100 properties back to the allocation pool per year for 3 years • Accelerate Property Acquisitions for unmet homelessness needs and to increase housing options • Continued commitment to flip 100 temporary tenancies per year, minimising transitions for homeless households • Improve access to the PRS through Fife Private Rented Sector Solutions • Focus on improved void management and long term empty homes in the private sector • Focussed case management to improve record management • Re-provision hostels to housing access hubs to improve customer experience and journeys through temporary accommodation 	<ul style="list-style-type: none"> • Whole systems approach promoting collaboration and building capacity to prevent homelessness within public and voluntary services • Improved navigation and information sharing across services • Priority Pathways for those most at risk • Develop partnership best practice models of prevention in preparation for the impending Housing Bill • Enhanced tenancy sustainment - reduce evictions / abandonment • Public Perceptions campaign to promote access to help and support • Promote universal prevention measures with a focus on children in schools <div data-bbox="741 616 1223 823" style="text-align: center; border: 1px solid gray; border-radius: 50%; padding: 10px; background-color: #d3d3d3;"> <p>Homelessness Improvement</p> </div> <ul style="list-style-type: none"> • Upscale Housing First targeting complex needs, providing 115 tenancies at all times • Enhance service commissioning to meet strategic needs subject to annual monitoring, evaluation and review • Update the strategic needs assessment underpinning the strategy in 2024 linked to the General Funding Housing Account Business Plan Review • Enhance links with employability and wider support services • Promote customer engagement, promoting choice and empowerment within housing journeys • Develop a series of Housing Access Hubs and re-provision accommodation units that are not fit for purpose
Make Homelessness short	Ensure homelessness is non-recurring

11 January 2024
Agenda Item No. 11

Review of the Mothballing of Milton of Balgonie Primary School

Report by: Shelagh McLean, Head of Service (Education and Children's Services)

Wards Affected: Wards 14 and 15

Purpose

This report responds to the decision of the Cabinet Committee of 17 November 2022, and information contained within the 22 September 2022 committee report, with the findings of the review of the current information relating to Milton of Balgonie Primary School. This report also responds to the feedback from two engagement sessions held in early November with parents/carers of pupils living in the Milton of Balgonie Primary School catchment area and parent/carers of pupils enrolled in Coaltown of Balgonie Primary School. As a result of the review and the feedback from the engagement sessions, a statutory consultation proposal paper is presented with a proposal to close Milton of Balgonie Primary School and to rezone the catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools. Approval of the content is sought, and the Cabinet Committee is asked to authorise officers to proceed to statutory consultation in respect of the proposal.

Recommendations

The Cabinet Committee is asked to:

1. note the information contained within the report in respect of the current position regarding pupil numbers within the catchment area of Milton of Balgonie Primary School and the current position with planning applications in both the Milton of Balgonie Primary School and Coaltown of Balgonie Primary School catchment areas;
2. approve the content of the statutory Consultation Proposal paper, in terms of the Schools (Consultation) (Scotland) Act 2010, relating to the proposed closure of Milton of Balgonie Primary School and the rezoning of the catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools;
3. authorise officers to proceed to statutory consultation in terms of the Consultation Proposal;
4. authorise officers to make such amendments to the Consultation Proposal paper (including the timeline) as may be necessary;
5. authorise the continued mothballing of Milton of Balgonie Primary School until the outcome of the statutory consultation process is determined and, during the continued mothballing period, to approve the arrangement whereby any child or children wishing to enrol at Milton of Balgonie Primary School will be offered a place at Coaltown of Balgonie Primary School and provided with free transport if they meet the distance criteria; and
6. note that the Consultation Report will be brought forward to a future meeting of the Cabinet Committee of Fife Council.

Resource Implications

There are no direct resource implications relating to finance, people or assets. As requested by Fife Council's Risk Management Team, the Milton of Balgonie Primary School building has been emptied of resources and furniture to comply with the Building Insurance Policy and to reduce risk to the council of vandalism and fire. A significant amount of officer time will be dedicated to the consultation process if approved by committee.

Legal & Risk Implications

The consideration and determination of this report is by the council acting as education authority. There are no risks associated with this paper, however, as noted previously, the statutory consultation to formally close this school would be carried out in accordance with the terms of the Schools (Consultation) (Scotland) Act 2010. Milton of Balgonie Primary School was mothballed formally, by committee decision, on 26 January 2021. The present academic year (2023/24) is the fourth academic year during which the school has been mothballed formally. The period of mothballing will exceed the maximum duration for rural schools referred to in the Scottish Government Schools (Consultation) (Scotland) Act 2010 Guidance from 26 January 2024. Fife Council is required to have regard to the Guidance. Milton of Balgonie Primary School is a rural school, being a school listed on the Rural Schools List maintained by the Scottish Ministers. The Schools (Consultation) (Scotland) Act 2010 includes a presumption against the closure of a rural school.

Impact Assessment

An EqIA (Equalities Impact Assessment) was not required in the preparation of this report. A full impact assessment will be carried out as part of any statutory consultation process.

Consultation

Discussion has taken place with the Headteachers of Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools.

The Education Service has written previously to all parents/carers living in the Milton of Balgonie Primary School catchment area, in July 2019, January 2021 and November 2021, giving them an update on the current position with the school. Parents/carers of pupils enrolled in Coaltown of Balgonie Primary School have continued to be supported by the Headteacher of Coaltown of Balgonie.

There has been no feedback to date to suggest that parents/carers of pupils from the Milton of Balgonie Primary School catchment area are unhappy with the provision offered within Coaltown of Balgonie Primary School. There have been no parent/carer requests to the Education Service to reinstate Milton of Balgonie Primary School as an operational school.

Two parental/carer engagement sessions were held as part of the 2023 annual review of the mothballing, the first on 7 November in Coaltown of Balgonie Primary School and the second on 8 November in the village hall in Milton of Balgonie. At these sessions, the Head of Education and Children's Services gave an overview of the current mothballing position. The presentation given at these sessions is contained in Appendix 15 of the Proposal Document (Appendix A to this report). These engagement sessions do not form part of a formal statutory consultation process.

1.0 Background

- 1.1 As part of the decision of the Cabinet Committee of 22 September 2022, to defer a decision on progressing a statutory consultation with regards to the proposal to close Milton of Balgonie Primary School and rezone the catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary School, a further report was requested by the Cabinet Committee.
- 1.2 This report was submitted to the Cabinet Committee of 17 November 2022, providing information on the legal position regarding the previous decision to mothball Milton of Balgonie Primary School and clarifying the position with regards to any planning applications within the Milton of Balgonie Primary School catchment area.
- 1.3 The Cabinet Committee of 17 November 2022:
 - (a) noted the terms of the report in respect of the matters that the Committee on 22 September 2022 asked to be addressed; those being the legal position regarding the previous decision to mothball Milton of Balgonie Primary School and clarification of any previously approved planning applications within the catchment area;
 - (b) agreed to continue with the existing mothballing arrangements for Milton of Balgonie Primary School;
 - (c) agreed that, during the mothballing period, any children wishing to enrol at Milton of Balgonie Primary School would continue to be offered a place at Coaltown of Balgonie Primary School and provided with free transport if they met the distance criteria; and
 - (d) noted that a further review of the mothballing by the Education Service was to take place in June 2023, reporting the outcomes to the earliest available Committee thereafter.

2.0 The Mothballing of Milton of Balgonie Primary School

- 2.1 As outlined in the 17 November 2022 report, Milton of Balgonie Primary School is a small rural school with capacity for 75 pupils. The school roll steadily declined from 45 pupils in 2003 to 14 pupils in 2018. The individual school rolls, per year, were as follows:

Academic session	School Roll	Academic session	School Roll
2003	45	2013	27
2004	31	2014	24
2005	27	2015	26
2006	30	2016	26
2007	25	2017	23
2008	26	2018	14
2009	30	2019	0
2010	24	2020	0
2011	27	2021	0
2012	29	2022	0

- 2.2 The school roll for academic session 2023/24 is 0 pupils.
- 2.3 As a result of the pupil roll being 0, Milton of Balgonie Primary School was formally mothballed in January 2021. This temporary closure of the school, “mothballing” in terms of the Scottish Government guidance, was recommended as the pupil roll had fallen to zero and remained at zero. Mothballing was recommended, rather than progressing immediately to consultation on closure under the 2010 Act, to provide an opportunity for the school to reopen should circumstances change.

- 2.4 The original reasons for mothballing the school remain and the school roll remains zero pupils.

3.0 Update on Approved Planning Applications

- 3.1 Milton of Balgonie Primary School is set within a small village, currently with 204 residential units.
- 3.2 The adopted Fife Local Development Plan details the housing development sites across Fife, to support housing demand in accordance with the South East Scotland (SES) Plan and Tay Plan requirements.
- 3.3 The Housing Land Audit is produced annually by Business and Employability Services and this report details all the proposed sites with planning permission; sites that are effective but not yet with planning permission and sites which are non-effective i.e. those that may have market constraints.
- 3.4 Milton of Balgonie Primary School catchment area has one development site, planning application reference 23/00231/FULL – Balfour Place/Main Street, detailed within the Local Development Plan. As outlined previously to committee, this site has been listed in the Housing Land Audit for several years. This site has not yet received planning permission and, therefore, no construction has commenced. However, even though the site has not received planning consent, as this is an effective site contained within the Housing Land Audit, it is included in school roll projections.

Application Ref No.	Site Name	Qty	Status
23/00231/FULL	Main Street, Milton of Balgonie	63	No consent

- 3.5 Within the Coaltown of Balgonie Primary School catchment area, there are three sites contained within the Local Development Plan. All three are contained within the Housing Land Audit (2022), with one listing at Main Street North proposed as effective housing supply, one site at Coaltown East listed as having “marketing constraints (therefore non-effective) and the third site, Pytree Road North, listed as non-effective. These three sites have been listed in the Housing Land Audit since 2014. The details of the three sites are:

Ref No.	Site Name	Local Plan Capacity	Status
22/04156/FULL	Main Street North (HLA listed effective)	50	Planning consent for 80 units
23/00997/FULL	Coaltown East (HLA listed non effective)	88	No consent
GLE099	Pytree Road North (HLA listed non effective)	23	No consent

- 3.6 An application for 80 units at Main Street North/Queens Meadow (22/04156/Full) has been consented and is 30 units over the local plan site capacity. A section 75 legal agreement has been signed and the developer will provide, through planning obligations, contributions towards a one classroom extension at Coaltown of Balgonie Primary School. This application has been included in the school roll projections. An application for 102 units, 14 over the local plan site capacity, is progressing through the planning process, at land to the south of Millburn Avenue, Coaltown of Balgonie (23/00997/FULL). This site was not included in the roll projections as it was classed as having “marketing constraints” within the Housing Land Audit 2022. However, 102 houses have been included within revised school roll projections. This site has not yet received planning

consent. This developer would also be expected to contribute to the one classroom extension at Coaltown of Balgonie Primary School. No application has been received, to date, for Pytree Road North. Therefore, this site is not included in the roll projections.

- 3.7 The pupil projection methodology indicates that the pupil product expected from the 2 effective sites (i.e. those at Main Street, Milton of Balgonie and Main Street North, Coaltown of Balgonie), over a five year period, will be around 64 primary aged pupils, based on the Fife area average of 0.354 pupil product per house.
- 3.8 The Education Service has reviewed all housing developments within the Coaltown of Balgonie Primary School and Milton of Balgonie Primary School catchment areas. Whilst it is not possible to include non-allocated sites in our pupil projections, all available information has been utilised for the purpose of this exercise.
- 3.9 The school roll projections showing Coaltown of Balgonie Primary School with projected pupils from Milton of Balgonie Primary School and including the projected new pupils from the three effective housing developments i.e. Main Street, Milton of Balgonie; Main Street North, Coaltown of Balgonie and Coaltown East, Coaltown of Balgonie, are shown below. These figures include the pupils (Lochtyview area) currently within the Coaltown of Balgonie Primary School catchment that would, should the proposed catchment review be approved, move out of the Coaltown of Balgonie Primary School catchment area to Pitteuchar East and Thornton Primary Schools.

Year	2023	2024	2025	2026	2027	2028
Roll	99	119	125	142	152	154
Capacity	100	100	100	100	100	100

- 3.10 Whilst the roll projections for Coaltown of Balgonie Primary School, shown above, highlight that the school roll is projected to exceed the current maximum capacity of four classes, the multi-purpose room and the planned one classroom extension would provide the accommodation required to manage pupil numbers. The Education Service is confident that the collaboration between the Planning Service and the Education Service, to analyse and respond to planning applications, is robust. School capacity risks are reviewed whenever the Housing Land Audit is renewed and when every new planning application is received and the roll projections reflect current pupil numbers, school capacity, class organisation and other relevant legislation and policies. These assessments are, and will continue to be, based on school data that is updated annually e.g. Pupil Census, School Estate Core Facts, and the Housing Land Audit.

4.0 2023 Review of the Mothballing of Milton of Balgonie Primary School

- 4.1 The Primary 1 enrolment process for all schools in Fife commences in January each year, with parents/carers asked to submit an online application for their catchment school. Using the same online process, parent/carers can also make a placing request at the same time.
- 4.2 From those residing within the catchment area of Milton of Balgonie Primary School, there was one application for a primary place in August 2023. The parent/carer of the pupil made a placing request to another school and the place at this alternative school was approved, in accordance with placing request legislation. There are no pupils from the Milton of Balgonie Primary School catchment area enrolled in Milton of Balgonie Primary School for session 2023/24.

- 4.3 Milton of Balgonie Primary School has not been in operation since June 2019 and four academic sessions have passed without a significant increase in pupils in this catchment area. There have been fewer than five births for the past seven years in this catchment area.
- 4.4 Current information shows that both the number of births in the catchment area and the number of school age children residing in the area have not increased sufficiently to warrant the school reopening.
- 4.5 The school has been mothballed formally since January 2021 and there has been no attempt by parents/carers to seek the reopening of Milton of Balgonie Primary School for academic sessions 2019/20, 2020/21, 2021/22, 2022/23 and for 2023/24. For 2023/24, all 12 primary aged pupils living in the Milton of Balgonie Primary School catchment area have either enrolled at Coaltown of Balgonie Primary School, the catchment denominational primary school or made placing requests to attend other schools.
- 4.6 As outlined in the 17 November 2022 report, if the school were operational and all the primary age pupils living in the Milton of Balgonie catchment area had chosen to attend there, the school would be operating as a single class school with children from primary 1 to primary 7 being taught in the same class.
- 4.7 At 26 January 2024, Milton of Balgonie Primary School will have been mothballed formally for three years, although the school has not been operational since August 2019, which is a period covering five academic years. Continuing to mothball the school for a further period, without progressing with a full stakeholder Consultation process, is contrary to the statutory guidance referred to above.
- 4.8 Mothballing schools for lengthy periods is discouraged as it is viewed as a way of undermining the authority's obligation to conduct a statutory consultation on school closure. Continual mothballing can make closure inevitable and denies the current parents/carers and other stakeholders, including Education Scotland HM Inspectors, an opportunity to have their say on the closure.
- 4.9 The reasons for the extant decision to mothball remain and it continues to appear unlikely that there will be any meaningful change that would result in the school reopening in the near future. The proposed housing within the Milton of Balgonie Primary School has not yet received planning consent and, therefore, it is unknown when this development will start.
- 4.10 As the school is not "very remote" (nearest village of Coaltown of Balgonie is 1.7 miles away), the council must have regard to the three-year time limit referred to in the Scottish Government guidance and ensure that a decision on the future of the school is made to allow, for example, a closure proposal to proceed or for the school to reopen.
- 4.11 In light of the Scottish Government guidance regarding the three-year time limit for mothballing, and to consider the impact for the small number of pupils living within the catchment area, this review concludes that a statutory consultation should be undertaken, proposing the closure of Milton of Balgonie Primary School.
- 4.12 Whilst reviewing the information in respect of the proposal to close Milton of Balgonie Primary School, the Education Service also appraised the school occupancy, catchment boundaries, births and proposed housing development sites in Milton of Balgonie, Coaltown of Balgonie, Pitteuchar East and Thornton Primary School catchment areas. In light of that, this paper also details the proposal to rezone the catchment areas of Pitteuchar East and Thornton Primary Schools. Taking the opportunity to review this alongside the proposed closure of Milton of Balgonie Primary School will allow the Education Service an opportunity to realign the school catchment areas, whilst maximising occupancy at Thornton and Pitteuchar East Primary Schools based on existing and future housing development plans.

- 4.13 The Milton of Balgonie Primary School empty building continues to be monitored and is managed by Orbis, through Property Services, to ensure it is wind and watertight. The school resources were removed in November 2021 to ensure compliance with Fife Council's insurance.
- 4.14 If the closure proposal is approved by the Cabinet Committee, consideration will be given to other educational uses for the site. If none can be identified other uses by the Council will be considered. If no alternative uses can be identified in this way the site will be disposed of. No decision can be made on the future use of the site unless the closure proposal is approved by the Cabinet Committee, but there are potential educational uses for the site that could be explored at that stage.
- 4.15 Including the pupils residing in the Milton of Balgonie Primary School catchment area, Coaltown of Balgonie Primary School has a school roll of 99 pupils for academic session 2023/24, across four classes. The multi-purpose room, used last year as a teaching space, has reverted to a multi-purpose area for academic session 2023/24.

5.0 Outcome of the 2023 Review

- 5.1 Milton of Balgonie Primary School has remained formally mothballed since January 2021. Reviews of the decision to mothball the school were carried out in November 2021 and June 2022 and were based on the current school roll, the projected roll and any feedback received from stakeholders. Any new catchment pupils have been offered a place at Coaltown of Balgonie Primary School, in accordance with the mothballing decision.
- 5.2 The review in June 2023 has highlighted that:
- (a) no parents/carers of pupils living in this area have formally requested that Milton of Balgonie Primary School should be reopened for the August 2023/24 session;
 - (b) birth information shows that the births in the Milton of Balgonie catchment area have not significantly increased in the last year and there is no other significant increased growth in pupil population anticipated in this area;
 - (c) the one development site, contained within the local development plan for this catchment area has not yet received planning consent and, therefore, no guarantee can be given that the housing will commence soon;
 - (d) this is the fifth academic session where the school within the Milton of Balgonie village has had no pupils on the roll. All parents living in the catchment area have accepted a place in Coaltown of Balgonie Primary School, the catchment denominational school or have made placing requests to alternative schools.
- 5.3 Engagement sessions were held on the evenings of 7 and 8 November in Coaltown of Balgonie Primary School and the Village Hall, Milton of Balgonie, respectively. Parents/carers of all Milton of Balgonie Primary School catchment area primary aged pupils and nursery aged pupils were invited to attend, as well as parents/carers of pupils enrolled in Coaltown of Balgonie Primary School. The session in the village hall, Milton of Balgonie, was also attended by other residents in the community. (The feedback received can be found in Appendix 14 within Appendix A to this report i.e. para 1.31 of the Consultation Proposal.) Additionally, an opportunity was provided for parents/carers to contribute to the engagement feedback via an online form. The information from this is noted in para 1.32 in the Consultation Proposal. It is evident from the feedback received that the community of Milton of Balgonie should have an opportunity to have their views heard on the future of Milton of Balgonie Primary School.

- 5.4 Therefore, the 2023 review of the mothballing arrangement concludes that, considering the above, and the extant decision to mothball the school, the Education Service should undertake a consultation with stakeholders on a proposal to close Milton of Balgonie Primary School. The reasons for mothballing remain and there is unlikely to be any meaningful change.
- 5.5 The Education Service has prepared a proposal paper for the closure of Milton of Balgonie Primary School and the rezoning of the catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools.
- 5.6 If approval is given by committee to proceed to statutory consultation, the school will continue to be mothballed until the outcome of the statutory consultation process is determined.
- 5.7 Any new pupil who moves into the catchment area should contact Coaltown of Balgonie Primary School where they will be offered a place, subject to the normal enrolment process in terms of class organisation.
- 5.8 For any primary one pupil due to start in August 2024, they will be able to enrol for primary education in January 2024. The online system will verify catchment area and any pupil living in the Milton of Balgonie Primary School will be contacted by staff within Coaltown of Balgonie Primary School, where a place will be offered.

6.0 Consultation Documents

- 6.1 The Schools (Consultation) (Scotland) Act 2010, as amended, provides for the publication of a proposal paper that:
- Sets out the details of the relevant proposal
 - Proposes a date for the implementation of the proposal
 - Contains the educational benefits statement for the proposal
 - Refers to such evidence or other information in support of the proposal as the council considers appropriate.
- 6.2 The proposal paper is attached as an Appendix to this report. The document will form the basis of the statutory consultation. Copies of the proposal document will be made available to all the relevant statutory consultees.
- 6.3 The statutory consultees are:
- The parent council of any affected school,
 - The parents of the pupils at any affected school,
 - The parents of any children expected by the Education Authority to attend any affected school within two years of the date of publication of the proposal paper,
 - The pupils at any affected school (in so far as the Education Authority considers them to be of suitable age and maturity),
 - The staff (teaching and other) of any affected school,
 - Any trade unions which appear to the Education Authority to be representative of the staff (teaching and other) of any affected school,
 - The community council (if any),
 - The Community Planning Partnership,
 - Any other Community Partnership the Education Authority considers relevant,
 - Any other education authority the Education authority considers relevant,
 - The users of any affected school that the Education authority considers relevant.

6.4 The proposed timeline for the consultation on the proposal to close Milton of Balgonie Primary School and rezone the catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary School is as follows:

Thursday 11 January 2024	Consultation proposal considered by Fife Council 's Cabinet Committee
Tuesday 23 January 2024	Parents and other statutory consultees issued with Consultation Notice informing them of relevant dates and information about the statutory consultation
Wednesday 24 January 2024 – Tuesday 12 March 2024	Consultation live
Wednesday 14 – Friday 16 February 2024	School INSET and School holidays
	<p>Public meetings held on:</p> <ul style="list-style-type: none"> • Village Hall, Milton of Balgonie on Monday 5 February 2024 from 6-7 pm • Thornton PS on Monday 12 February 2024 from 6-7 pm • Pitteuchar East PS on Wednesday 28 February 2024 from 6-7 pm <p>Drop-in sessions at:</p> <ul style="list-style-type: none"> • Pitteuchar East PS on Tuesday 30 January 2024 from 8.45-9.30 am • Coaltown of Balgonie PS on Monday 5 February 2024 from 2.30-3.30 pm • Village Hall, Dickson Lane, Milton of Balgonie on Monday 5 February 2024 from 5-6 pm • Thornton PS on Monday 12 February 2024 from 8.45-9.30am • Thornton PS on Monday 12 February 2024 from 5-6 pm • Pitteuchar East PS on Wednesday 28 February from 5-6 pm
Tuesday 12 March 2024	Consultation Close
Friday 15 March 2024	Report on consultation process is submitted to Education Scotland
Monday 18 March 2024 – Friday 19 April 2024	Education Scotland three week review
Friday 29 March – Friday 12 April 2024	School holidays
Tuesday 23 April 2023	Education Service receives report from Education Scotland
Friday 26 April 2024	Sign off Education Scotland report
Tuesday 14 May 2024	Consultation Report published three weeks before the Cabinet Committee
Thursday 6 June 2024	Report submitted to the Cabinet Committee
Thursday 13 June 2024	End of Fife Council Call-In Period
Friday 16 August 2024	End of Scottish Government Call-In Period
Monday 19 August 2024	Proposed date of implementation

7.0 Summary

7.1 This report provides the detailed proposal paper relating to the proposal to close Milton of Balgonie Primary School and to rezone the catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools.

List of Appendices

Appendix A - Proposal to close Milton of Balgonie Primary School and rezone the primary catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools.

Background Papers

The following was relied on in the preparation of this report in terms of the Local Government (Scotland) Act, 1973:

- Schools (Consultation) (Scotland) Act 2010
<https://www2.gov.scot/Resource/0047/00477028.pdf>
- Scottish Government Schools (Consultation) (Scotland) Act 2010 Guidance
<https://www.gov.scot/publications/schools-consultation-scotland-act-2010-statutory-guidance/>

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FIFE COUNCIL EDUCATION & CHILDREN'S SERVICES DIRECTORATE

THE CONSULTATION PROCESS

The following schools are affected by this Proposal Document:

- Milton of Balgonie Primary School
- Coalton of Balgonie Primary School
- Pitteuchar East Primary School
- Thornton Primary School

This document has been issued by Fife Council as a proposal paper in terms of the Schools (Consultation) (Scotland) Act 2010.

DISTRIBUTION

A copy of this document is available on the Fife Council website:

<http://www.fife.gov.uk/miltonofbalgonieprimary>

A link to this document, published on the website, will be provided to:

- The Parent Council or Combined Parent Council of any affected school
- The parents of the pupils at any affected school
- The parents of any children expected by the education authority to attend any affected school within two years of the date of publication of the proposal paper
- The pupils at any affected school (in so far as the education authority considers them to be of a suitable age and maturity)
- The staff (teaching and other) at any affected school
- any trade union which appears to the education authority to be representative of the persons mentioned in sub-paragraph (e) trade unions representatives of the
- The Community Council (if any) (Milton & Coalton of Balgonie, Pitteuchar, Stenton & Finglassie and Thornton)
- The community planning partnership (within the meaning of section 4(5) of the Community Empowerment (Scotland Act 2015) for the area of the local authority in which any affected school is situated,
- Any other community planning partnership that the education authority considers relevant
- Any other users of any affected school that the education authority considers relevant
- Elected Members for the area (Wards 14 and 15 - Cllr John Beare, Cllr Peter Gulline, Cllr Lynn Mowatt, Cllr Jan Wincott, Cllr Derek Noble, Cllr Ross Vettraino, Cllr Daniel Wilson)
- MSPs for the area (Jenny Gilruth, Murdo Fraser, Alex Rowley, Liz Smith, Claire Baker, Mark Ruskell, Alexander Stewart, Roz McCall)
- The Constituency MP (Peter Grant)

A copy of this document is also available for inspection at and collection from:

- Main Reception, Fife Council, Fife House, North Street, Glenrothes KY7 5LT
- Online at www.fife.gov.uk/miltonofbalgonieprimary
- The primary schools affected by the proposal:
 - Coalton of Balgonie Primary School, School Road, Coalton of Balgonie, KY7 6HY
 - Pitteuchar East Primary School, 1 Glamis Avenue, Glenrothes, KY7 4NU
 - Thornton Primary School, 65 Station Road, Thornton, KY1 4AY
- Auchmuty High School, Dovecot Road, Glenrothes, KY7 5JL
- Or via email to sustainablechoolestate.enquiries@fife.gov.uk

This document can be made available, on request, free of charge, in alternative formats, or in translated form for readers whose first language is not English. Please apply in writing to: Education & Children's Services Directorate, 4th Floor, Fife House North Street, Glenrothes or by email to: avril.graham@fife.gov.uk (Telephone 03451 555555 ext. 444204). Page 56 of this document provides additional contact numbers, in different languages.

SUMMARY OF PROCESS FOR THIS PROPOSAL DOCUMENT

1. Consideration by the Cabinet Committee

This Proposal Document has been issued as a result of a decision taken by the Cabinet Committee of Fife Council on Thursday 11 January 2024. Views are now sought in formal consultation on the proposals in this document.

2. Notice of Consultation and Publication of the Proposal Document

Statutory consultees will be given notice of the proposal. The proposal document will be published on the council website (www.fife.gov.uk). Copies will be available for inspection at and collection from:

- Main Reception, Fife Council, Fife House, North Street, Glenrothes, KY7 5LT
- The schools affected by the proposal (between the hours of 9 am and 3 pm):
 - Coaltown of Balgonie Primary School, School Road, Coaltown of Balgonie, KY7 6HY
 - Pitteuchar East Primary School, 1 Glamis Avenue, Glenrothes, KY7 4NU
 - Thornton Primary School, 65 Station Road, Thornton, KY1 4AY
 - Auchmuty High School, Dovecot Road, Glenrothes, KY7 5JL
- Online at www.fife.gov.uk/miltonofbalgonieprimary
- Or via email to sustainableschoolestate.enquiries@fife.gov.uk

3. Advertisement of the Proposal

The proposal will be advertised through Fife Council's social media accounts e.g. Facebook and Twitter. An advertisement will also be placed in local newspapers, week commencing Monday 22 January 2024. The schools impacted by the proposal will also publicise the consultation process in newsletters, school bag mail and email.

4. Length of Consultation period

The consultation will commence on Wednesday 24 January 2024 and will, thereafter, run until close of business on Tuesday 12 March 2024. This meets the statutory requirement for a minimum period of 6 weeks, that runs continuously and includes 30 school days.

5. Public meetings

Although only one public meeting is required, the Education Service will hold 3 public meetings, on the respective dates listed below:

- Village Hall, Dickson Lane, Milton of Balgonie on Monday 5 February 2024 from 6-7 pm
- Thornton Primary School on Monday 12 February 2024 from 6-7 pm
- Pitteuchar East Primary School on Wednesday 28 February 2024 from 6-7 pm

where there will be opportunities to:

- hear more about the proposal and any alternatives to the proposal considered by the Council
- ask questions about the proposal and the alternatives
- have your views recorded so that they can be considered as part of the consultation process, including views on any alternatives to the proposal.

In addition to the public meetings offered above, informal drop-in sessions have been arranged at:

- Pitteuchar East Primary School on Tuesday 30 January 2024 from 8.45-9.30 am
- Coaltown of Balgonie Primary School on Monday 5 February 2024 from 2.30-3.30 pm
- Village Hall, Dickson Lane, Milton of Balgonie on Monday 5 February 2024 from 5-6 pm
- Thornton Primary School on Monday 12 February 2024 from 8.45-9.30 am
- Thornton Primary School on Monday 12 February 2024 from 5-6 pm
- Pitteuchar East Primary School on Wednesday 28 February from 5-6 pm

At the informal drop-in sessions there will be opportunities for parents/carers/pupils and other stakeholders to:

- hear more about the proposal and any alternatives to the proposal considered by the Council
- ask questions about the proposal and the alternatives
- complete a Consultation Response Form.

6. Responding to the Proposal

Interested parties can also respond to this proposal document by making a written representation (by letter, email or completion of a Consultation Response form) on the proposal, before close of business Tuesday 12 March 2024, to any of the following:

- sustainableschoolestate.enquiries@fife.gov.uk
- Milton of Balgonie Primary School Proposal, Education & Children's Services Directorate, Fife Council, 4th Floor (West), Fife House, North Street, Glenrothes KY7 5LT
- via submission of a completed online Consultation Response Form at ([Managing Our School Estate | Fife Council](https://forms.office.com/Pages/DesignPageV2.aspx?subpage=design&FormId=L6Vp-cBC8UCYutrBEMlfK473OCZXzVBgl3xTQFBcvhUNjBWSDFTU0Y4RFJXUIBYM0xBTIJVMVpPNi4u))
(<https://forms.office.com/Pages/DesignPageV2.aspx?subpage=design&FormId=L6Vp-cBC8UCYutrBEMlfK473OCZXzVBgl3xTQFBcvhUNjBWSDFTU0Y4RFJXUIBYM0xBTIJVMVpPNi4u>)

7. Involvement of Education Scotland HM Inspectors

A copy of the proposal paper will be sent to Education Scotland by Fife Council. Education Scotland will also receive a copy of any relevant written representations that are received by the Council from any person during the consultation period or, if Education Scotland agrees, a summary of them. Education Scotland will further receive a summary of any oral representation made to the Council at the public meetings and, as available (and so far as otherwise practicable), a copy of any other relevant documentation. Education Scotland will then prepare and submit a report on the educational aspects of the proposal within a 3-week period (unless the Council and Education Scotland agree a longer period) after the Council has sent them all representations and documents mentioned above. However, for the avoidance of doubt, the 3-week period will not start until after the consultation period ends. Education Scotland may make such reasonable enquiries of such people at the school (e.g. Headteacher, staff, pupils) as they consider appropriate and may make such reasonable enquiries of such other people as they consider appropriate.

8. Preparation of Consultation Report

The Council will review the proposal having regard (in particular) to the Education Scotland Report and written representations that it has received. In addition, oral representations made at the public meetings will form part of that review. It will then prepare a Consultation Report. The report will include a record of the total number of written representations made during the consultation period, a summary of the written representations and a summary of the oral representations made at the public meetings as well as a copy of the Education Scotland Report and any other relevant information, including details of any alleged inaccuracies and how these have been handled. The report will also contain a statement explaining how it complied with the requirement to review the proposal in light of the Education Scotland Report and representations (both written and oral) that it received. The Consultation Report will be published and available for further consideration for a period of 3 weeks before a decision can be made on the proposal. The report will be published, made available for inspection and where reasonable required, made available without charge in other forms. It will also explain the opportunity that may arise for making representations to Scottish Ministers in respect of call-in of the proposal. The publication of the report will be advertised and any person who made written representations during the consultation period will be advised of its publication.

9. Decision

The Consultation Report, together with any other relevant documentation, will be considered by the Cabinet Committee of Fife Council, which will come to a decision whether to implement the proposal, in whole or in part, or not. The decision of the Cabinet Committee will be subject to the Council's internal governance procedures before it becomes final. If the Council decides to implement the proposal, in whole or in part, the decision will be notified to the Scottish Ministers.

10. Scottish Ministers Call-in

Fife Council will notify the Scottish Ministers of the decision and give them a copy of the Proposal Paper and Consultation Report within 6 days of the Council making a decision to implement the proposal in whole or in part. The Council will also publish the fact it has done so on its website together with details on how to make representations to Scottish Ministers. The Scottish Ministers have an 8-week period, from the date of the Council's decision, to decide if they will call-in the proposal. Any call-in by the Scottish Ministers will only apply to the closure of Milton of Balgonie Primary School. Within the first 3 weeks of that 8-week period, the Scottish Ministers will take account of any relevant representations made to them by any person. Unless the Scottish Ministers inform the Council that they do not intend to call-in the proposal before the end of the 8-week period, the Council will not proceed to implement any proposal during the 8-week period. If the Scottish Ministers decide to call in a closure proposal, they must refer it to the Convener of the School Closure Review Panels for determination by a School Closure Review Panel. The authority may not implement the proposal in whole or in part unless the Panel has granted consent to it (with or without conditions) and either the period for making an appeal to the sheriff has expired or, if an appeal has been made, it has either been abandoned or the sheriff has confirmed the Panel's decision.

Until the outcome of any call-in has been notified to the Council, it is unable to proceed to implement the proposal.

The Scottish Ministers can issue a call-in notice if they consider that the Council has failed in a significant regard to comply with the requirements of the Schools (Consultation) (Scotland) Act 2010, which are relevant to the closure proposal or if they consider that the Council has failed to take proper account of a material consideration relevant to the decision to implement the closure proposal.

11. Note on Corrections

If during the consultation period any inaccuracy or omission is discovered in this proposal document, either by the Council or by notification from any other person, the Council will determine whether relevant information has in its opinion been omitted, or whether there is in fact an inaccuracy, and whether the omission or inaccuracy relates to a material consideration relevant to the education authority's decision as to the implementation of the proposal. It will then take appropriate action in respect of the inaccuracy or omission which may include deciding to take no further action, issuing a notice in respect of the inaccuracy or omission, extending the consultation period or publishing a correct proposal document and giving revised notice of the consultation. Where applicable, the notifier of the inaccuracy or omissions will be advised of the determination, the reasons for that determination and the action (if any) it is taking and of the reasons why it is or is not taking such action and the notifier will be invited to make representations to the Council if they disagree with the determination or decision whether to take action. Where the notifier makes representations, the education authority can make a fresh determination and decision in respect of the inaccuracy or omission and must inform the notifier if it does so.

Fife Council

Education & Children's Services Directorate

THE CONSULTATION PROPOSAL

**PROPOSAL TO CLOSE MILTON OF BALGONIE PRIMARY SCHOOL
AND TO REZONE THE CATCHMENT AREAS OF COALTOWN OF
BALGONIE, PITTEUCHAR EAST AND THORNTON PRIMARY
SCHOOLS**

Format of the Proposal Document

1. Introduction
2. The Proposal
3. Contextual Analysis
4. Milton of Balgonie Primary School - The Case for Closure
5. Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools - The Case for Rezoning the Catchment Areas
6. Educational Benefits Statement
7. Transport Arrangements
8. Nursery Provision
9. Secondary School Implications
10. Cost Per Pupil Calculation
11. Financial Implications
12. Grant Aided Expenditure (GAE)
13. Future Use of The Site
14. Community Impact of the Closure
15. Summary of Proposal
16. Proposed Date for Implementation
17. Statutory Consultation Process – Proposed Timeline

Appendices

- | | |
|-------------|---|
| Appendix 1 | Map of existing catchment areas – Coaltown of Balgonie and Milton of Balgonie |
| Appendix 2 | Map of existing catchment areas including Pitteuchar East and Thornton Primary Schools |
| Appendix 3 | Map of existing Milton community and wider community |
| Appendix 4 | Map of proposed Coaltown of Balgonie Primary School catchment area |
| Appendix 5 | Map of proposed Pitteuchar East Primary School catchment area |
| Appendix 6 | Map of proposed Thornton Primary School catchment area |
| Appendix 7 | Map showing proposed catchment areas with the A92 regional road |
| Appendix 8 | Travel route currently in use by pupils being transported from Milton of Balgonie village to Coaltown of Balgonie Primary School. |
| Appendix 9 | Core Facts |
| Appendix 10 | Financial analysis |
| Appendix 11 | Glossary of terms |
| Appendix 12 | Consultation Response Form |
| Appendix 13 | Housing Sites across the 4 catchment areas |
| Appendix 14 | Feedback from Engagement Sessions held in November 2023 |
| Appendix 15 | Presentation from Engagement Sessions held in November 2023 |

1 Introduction

- 1.1 This consultation paper sets out the rationale and implications in respect of the proposal to close Milton of Balgonie Primary School and to rezone the primary catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools.
- 1.2 This paper also sets out the consultation process, the timescales and the ways by which parents/carers and stakeholders can make representations on the proposal.
- 1.3 To ensure that the school estate provides best value, the Education and Children's Services Directorate must ensure that the number of pupil places is matched as efficiently as possible to the numbers of pupils living in each school catchment area.
- 1.4 In Fife, the Education Authority discharges its duty to secure adequate and efficient education for the local authority area by operating a "catchment" system, to enable parents/carers to comply with their duty to provide efficient education for their child(ren). Postcodes for each address in Fife are associated with a denominational (Roman Catholic) and non-denominational primary and secondary school, known as catchment schools. Parents can check their catchment area at [Check school catchment areas | Fife Council](#).
- 1.5 There are no proposed changes to the denominational primary school, nor either denominational or non-denominational secondary school catchment areas relevant to the proposal.
- 1.6 This paper details the closure proposal for Milton of Balgonie Primary School and the rezoning of the catchment area for Coaltown of Balgonie Primary School. Whilst reviewing the information in respect of the proposal to close Milton of Balgonie Primary School, the Education Service also appraised the school occupancy, catchment boundaries, births and proposed housing development sites in Milton of Balgonie, Coaltown of Balgonie, Pitteuchar East and Thornton Primary School catchment areas. In light of that, this paper also details the proposal to rezone the catchment areas of Pitteuchar East and Thornton Primary Schools. However, parents will continue to have the right to exercise parental choice and to make placing requests to alternative schools, subject to the normal constraints of school capacity.
- 1.7 The catchment areas of all 4 primary schools were established before the A92 regional road was constructed. The A92 now bisects these catchment areas. This has resulted in catchment boundary anomalies for housing development sites situated on the west of the A92. For example, part of the new housing site at Westwood Park (which is currently under construction) and the entire completed site of Lochtyview Way currently lie within the Coaltown of Balgonie Primary School catchment area.
- 1.8 Taking the opportunity to review this alongside the proposed closure of Milton of Balgonie Primary School will allow the Education Service an opportunity to realign the school catchment areas, whilst maximising occupancy at Thornton and Pitteuchar East Primary Schools based on existing and future housing development plans.
- 1.9 Several additional factors have been considered in the development of this proposal. These include projected pupil numbers from effective local plan development sites in Milton of Balgonie and Coaltown of Balgonie. One of these development sites has planning consent and a signed section 75 legal agreement for the provision of additional accommodation at Coaltown of Balgonie Primary School.

- 1.10 There is one housing development site in the Milton of Balgonie Primary School catchment area and this is currently being considered by statutory planning consultees. This site has not yet received planning consent. As this is a local plan site, this has been included in school roll projections.
- 1.11 Also included in the review, was analysis of the latest placing request statistics and trends, and potential opportunities to realign catchments geographically. In including these factors, the Education Service is anticipating future housing development, building capacity and resilience, ensuring that school occupancy levels now, and in the future, can be managed.
- 1.12 During academic session 2018/19, Milton of Balgonie operated as a one class, single teacher primary school, covering all primary stages. At the end of academic session 2018/19 the expected school roll for August 2019 was one pupil. The Headteacher advised the parent of the pupil that this would be the case, after which the parent decided to move their child to Coaltown of Balgonie Primary School. For session 2019/20, all Primary 1 pupils living in the Milton of Balgonie Primary School catchment area had enrolled within Coaltown of Balgonie Primary School or made a placing request to other primary schools.
- 1.13 Due to this unanticipated situation, the Education Service wrote to all parents, in June 2019, and arranged free school transport to Coaltown of Balgonie Primary School for those distance entitled pupils living in the Milton of Balgonie Primary School catchment area, commencing from August 2019. In session 2022/23 there were fewer than 10 primary aged pupils living in the Milton of Balgonie Primary School catchment receiving free transport to Coaltown of Balgonie Primary School. Of those travelling last session, fewer than 5 pupils travelled in one taxi, with collection points near to their home addresses, while another vehicle had fewer than 5 pupils who travelled with pupils from the existing Coaltown of Balgonie catchment area. For academic session 2023-2024, again there are fewer than 10 pupils from the Milton of Balgonie Primary School catchment area attending Coaltown of Balgonie Primary School, all travelling together in one vehicle, with pick up points close to their home addresses. Pupils are escorted to/from the school building and to/from the transport provided.
- 1.14 During session 2018/19, the last year the school was operational, Milton of Balgonie Primary School had one teacher, one Pupil Support Assistant (PSA) and one Clerical Assistant. A Catering Assistant was also employed by Fife Council's Facilities Management Service. These members of staff accepted transfer to alternative schools, to suit their own individual circumstances. The PSA from Milton of Balgonie joined the staff at Coaltown of Balgonie Primary School, which supported the transition process for pupils who had previously known the staff member at Milton of Balgonie Primary School.
- 1.15 Engagement has continued with the parents/carers within the Milton of Balgonie Primary School catchment area. The Education Service invited nursery parents, with children due to start Primary 1 in August 2020, to a meeting in Coaltown of Balgonie Primary School on 28 January 2020. Two families attended this meeting with the Head of Service and the Coaltown of Balgonie Primary School Headteacher. This meeting was held to allow parents an opportunity to ask questions about education provision.
- 1.16 In January 2020, the Education Service was aware that all the expected Primary 1 pupils living in the Milton of Balgonie Primary School catchment area had either enrolled at Coaltown of Balgonie Primary School or made placing requests to other primary schools, for session 2020/21. The Milton of Balgonie school roll remained 0 for session 2020/21.

- 1.17 The Education Service wrote to parents in January 2021 advising them of the decision to request approval of the mothballing of Milton of Balgonie Primary School and asked parents to provide any feedback if they were unhappy with this approach. No feedback was received by the Education Service or through direct contact with the Headteacher.
- 1.18 Therefore, as Milton of Balgonie Primary School was again expected to have no pupils for session 2021/22, the Education Service sought permission to mothball the school, through a report to the Education & Children's Services Sub-Committee on 26 January 2021.
- 1.19 The Education & Children's Services Sub-Committee, on 26 January 2021, considered the recommendation to mothball Milton of Balgonie Primary School as the school had had no pupils enrolled for any academic session from August 2019 onwards. The Committee Decision of 26 January 2021 was:
- (a) to Mothball Milton of Balgonie Primary School with immediate effect.
 - (b) that during the mothballing period, any children wishing to enrol at Milton of Balgonie Primary School will be offered a place at Coaltown of Balgonie Primary School and provided with free transport if they meet the distance criteria.
 - (c) that the resources and furniture within the school be offered to surrounding schools; and
 - (d) that a further report reviewing the decision be considered by the Sub-Committee in September 2021.
- 1.20 The Education Service wrote to all parents of pupils living in the Milton of Balgonie Primary School catchment area, on 1 November 2021, advising that an update paper regarding Milton of Balgonie Primary School would be submitted to the Education & Children's Services Sub-Committee on 9 November 2021. The Committee on the 9 November agreed:
- (1) to continue with the existing mothballing arrangements for Milton of Balgonie Primary School;
 - (2) that, during the mothballing period, any children wishing to enrol at Milton of Balgonie Primary School would continue to be offered a place at Coaltown of Balgonie Primary School and provided with free transport if they met the distance criteria; and
 - (3) that a further review by the Education Service would take place in June 2022, reporting the outcomes to the earliest relevant and available Committee of the Council thereafter.
- 1.21 Following this decision, the Education Service has continued to monitor both the number of pupils living in the Milton of Balgonie Primary School catchment area and local housebuilding and anticipated housebuilding.
- 1.22 On 22 September 2022, the Education Service presented a report to the Cabinet Committee of Fife Council, seeking authority to proceed with a statutory consultation under the Schools (Consultation) (Scotland) Act 2010 to close Milton of Balgonie Primary School and to rezone the catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools. The decision of the committee on 22 September 2022 in relation to Milton of Balgonie Primary School was:

- (a) to defer a decision on the Statutory Consultation Proposal paper, in terms of the Schools (Consultation) (Scotland) Act 2010, relating to the proposed closure of Milton of Balgonie Primary School and rezoning of the catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools until the next scheduled meeting of the Cabinet Committee on 20th October, 2022 and, in relation to the proposed closure of Milton of Balgonie Primary School, agreed that the report would outline the legal position regarding the previous decision to mothball the school and would clarify the position regarding any previously approved planning applications.

1.23 Due to the timing of the October Committee, the first available date that the Cabinet Committee could consider the report providing information on (a) above was the Cabinet Committee of 17 November 2022. Within the report officers:

- (a) provided the legal position to the current mothballing status of Milton of Balgonie Primary Schools;
- (b) detailed background information on the lead up to the mothballing decision;
- (c) presented information on the latest review of the mothballing of Milton of Balgonie Primary School;
- (d) provided information on previously approved planning applications within the Milton of Balgonie Primary School catchment area;
- (e) presented statistical information from the school roll census and roll projections; and
- (f) provided a summary and a next steps for elected members to consider.

1.24 The Cabinet Committee on 17 November 2022:

- (1) noted the terms of the report in respect of the matters that the Committee on 22nd September 2022 asked to be addressed; those being the legal position regarding the previous decision to mothball Milton of Balgonie Primary School and clarification of any previously approved planning applications within the catchment area; and
- (2) agreed to continue with the existing mothballing arrangements for Milton of Balgonie Primary School;
- (3) agreed that, during the mothballing period, any children wishing to enrol at Milton of Balgonie Primary School would continue to be offered a place at Coaltown of Balgonie Primary School and provided with free transport if they met the distance criteria; and
- (4) noted that a further review of the mothballing by the Education Service was to take place in June 2023, reporting the outcomes to the earliest available Committee thereafter.

1.25 In March 2023, the Education Service wrote to all parents, including those catchment pupils attending other primary schools, updating them on these decisions of the Committees.

1.26 The school has been mothballed since January 2021. The school building is currently being maintained by Property Services, to ensure it is wind and watertight. There has been no enrolment of any pupils in Milton of Balgonie Primary School for academic sessions 2020/21, 2021/22, 2022/23 or 2023/24. For session 2023/24, no pupils of primary one age from the Milton of Balgonie Primary School catchment area have enrolled at Milton of Balgonie Primary School.

- 1.27 This proposal paper reflects the outcome of the June 2023 review of the decision to mothball the school, which concluded that the Service should proceed with development of a proposal to close Milton of Balgonie Primary School and rezone the catchment area of Coaltown of Balgonie Primary School, to include the rezoning of the catchment areas of Pitteuchar East and Thornton Primary Schools. As Milton of Balgonie Primary School is a rural school, as required by Section 12A (2) (a), of the Schools (Consultation) (Scotland) Act 2010, this proposal identifies the reasons for formulating the proposal. These are:
- (a) Milton of Balgonie Primary School has had no pupils enrolled for academic sessions 2019/20, 2020/21, 2021/22, 2022/23 and 2023/2024.
 - (b) Milton of Balgonie Primary School has been mothballed since January 2021. The school building is currently being maintained by Property Services to ensure it is wind and watertight.
 - (c) There have been no enrolments of pupils in Milton of Balgonie Primary School since August 2019.
 - (d) Updated birth information has shown that the births in the catchment area have not increased in the last year and there is no other anticipated significant increased growth in pupil population in the catchment area from, for example, large scale housing development of over 100 units.
 - (e) Milton of Balgonie Primary School does not meet 2 of the Fife Council guiding principles as outlined in para. 3.1
 - (f) The pupil roll for session 2023/2024 is 0. The possible new primary one aged pupil living in the Milton of Balgonie Primary School has not enrolled at either Milton of Balgonie or Coaltown of Balgonie Primary Schools but was granted a place at another school through a placing request application.
- 1.28 On 1 November 2023, the Education Service wrote to parent/carers of pupils living in the catchment area of Milton of Balgonie Primary School; pupils attending Coaltown of Balgonie Primary School and nursery aged pupils living in the Milton of Balgonie Primary School catchment area, to invite them to 2 engagement sessions. There are fewer than 15 pupils living in the Milton of Balgonie Primary School catchment area and there are approximately 100 pupils attending Coaltown of Balgonie Primary School.
- 1.29 Two engagement sessions were held in the local communities. The first on Tuesday 7 November in Coaltown of Balgonie Primary School and the second on Wednesday 8 November in Milton of Balgonie village hall. The session held in Milton of Balgonie village hall was also attended by residents in the community. The feedback from these sessions is contained within Appendix 14.
- 1.30 A presentation was given by the Head of Education (Appendix 15) which detailed the current status of Milton of Balgonie Primary School; the reasons for the engagement sessions, information around the catchment area, the existing decisions made by Fife Council Committees; house building in the area and the next steps.
- 1.31 The areas raised during the engagement sessions are summarised below:
- Impact of housebuilding on schools rolls in both Coaltown of Balgonie Primary School and Milton of Balgonie Primary School
 - Loss of a community asset.

- Consideration, by the council, of births in the Milton of Balgonie catchment area
- Benefits to the community from extra-curricular activities provided at the school
- Financial implications as a result of the school not being in operation
- Milton of Balgonie PS catchment pupils are now settled within Coaltown of Balgonie Primary School and have friendship groups and more opportunities for social activities within a larger school
- Option of repurposing of Milton of Balgonie Primary School for another educational purpose
- Concern that all P1-P7 pupils could be in one class
- Mothballing has not been a fair process as pupils enrolled at Coaltown of Balgonie Primary School may not leave
- Costs incurred as a result of transporting pupils from Milton of Balgonie to Coaltown of Balgonie
- Pupils from Milton of Balgonie are unable to walk to school
- Smaller class sizes support better learning opportunities
- The process for making a placing request to Milton of Balgonie
- Why extend at Coaltown of Balgonie Primary School when a school is available in the next village
- Planning contributions being requested for Coaltown of Balgonie Primary School and not Milton of Balgonie Primary School
- Children should go to the school in the village they live in.

1.32 An opportunity was also provided for participants to feedback via an online form, or in writing, by 30 November 2023. 12 responses were received:

The results were as follows:

1	I am (choose one of the categories below):	Total
	Parent/carer of a child living in the Milton of Balgonie Primary School catchment area attending Coaltown of Balgonie Primary School	1
	Parent/carer of a child living in the Milton of Balgonie Primary School catchment area attending another primary school	0
	Parent/carer of a child living in the Coaltown of Balgonie Primary School catchment area attending Coaltown of Balgonie Primary School	5
	Staff member working at Coaltown of Balgonie Primary School	0
	Grandparent of a child attending Coaltown of Balgonie Primary School	0
	Member of the Community Council	
	Resident in the community	4
	Other	2
2	Do you understand the term 'mothballing'?	
	Yes	11
	No	1
3	Are you aware Milton of Balgonie Primary School is currently 'mothballed'?	
	Yes	11
	No	1
4	Are you aware that since August 2019, primary aged pupils in the Milton of Balgonie Primary School catchment area have been offered places at Coaltown of Balgonie Primary School as their alternative catchment area school and offered free school transport?	
	Yes	12
	No	0

5	For pupils from Milton of Balgonie Primary School catchment area, enrolled in Coaltown of Balgonie Primary School, are you happy with current arrangements that catchment Milton of Balgonie Primary pupils are offered a place within Coaltown of Balgonie Primary School?	
	Yes	4
	No	7
	This question was answered by participants that were not parents/ carers of pupils from Milton of Balgonie catchment i.e. residents in the community or other categories	

6	<p>Please share your views on the current 'mothballing' arrangements at Milton of Balgonie Primary School.</p> <ul style="list-style-type: none"> • School needs to be closed • I am a parent living in Milton of Balgonie with a nursery aged child who currently attends Markinch Nursery, if Milton of Balgonie Primary was an option my child would be enrolled there for school year 2024/25 • It's a shame that more small schools are closing when these villages have young families within them that can use the settings not only that with proposed and developing housing schemes coming to Coaltown it's going to create a greater demand on the stretched space and class size at Coaltown and compromise the quality of learning. It's unfair on our children and their development and if the council really cared about that they'd open up Milton and ease the pressure on both villages/surrounding areas in catchment. It will give job opportunities to newly qualified teachers and other roles involved. • The children at Coaltown had their library taken away to accommodate the rise in school roll. There was also a significant increase in the number of children with additional support needs who attended the school. This was challenging for both the staff and the children. The children of Milton should be in the school at Milton to allow them to develop a sense of belonging and community. The children already attend nursery outwith their village and now may attend schools in different areas - coaltown and Markinch- if the numbers go up. • I understand the "why" of the current mothballed state, however I don't believe this state should remain • It would be great to get the school open again if enough kids was to join • With new housing in the surrounding areas and more planned within Coaltown and potentially also Milton, this will impact capacity within schools. Milton is a community in its own right and children are not being afforded the same opportunities as their peers due to being schooled outside of this community. This has a detrimental impact of friendships, social opportunities and children's sense of inclusion and belonging. • I feel that as a community the school should not have been mothballed
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7	Did you attend an update information session on 7 or 8 November about the current 'mothballing' arrangements?	
	Yes	2
	No	10
8	<p>Following the information shared, what are your views on reopening or closing Milton of Balgonie Primary School on a permanent basis?</p> <ul style="list-style-type: none"> • I would like to see the school reopened. • I firmly believe the school should be reopened. Children should attend school in their own community. 	
9	<p>What are your views on reopening or closing Milton of Balgonie Primary School on a permanent basis?</p> <ul style="list-style-type: none"> • The school should have be originally been left open but the then headteacher in 2019 pressurised parents to take their children out of Milton and send them to coaltown or other schools, children from other areas like windygates and Kennoway were stopped by her from trying to attend, with the amount of houses that are getting build at markinch and Thornton opening up Milton would probably help in taking in some children • Should not re-open and children should remain at Coaltown • I am a formal Milton of Balgonie Pupil, as were my two older children, it saddens me that my youngest may never get the opportunity to attend our wee village school which was once a hive of busyness with a fun, relaxed learning environment • It should be reopened since surrounding schools are teaching capacity and new houses are being built in the area. There are also a number of teaching professionals sitting without jobs so opening a school would help with this well. • As pupil numbers at Coaltown are increased perhaps Milton should be reopened. • Positive. As per previous answer. It will allow continued quality of education, open up employment opportunities and help a sense of community in both the Coaltown and the Milton. • I think it will be a great loss. There a number of housing developments planned both in Milton and Coaltown of Balgonie. This has to have an impact on the number of children attending Coaltown Primary School. Over time the population changes and the school will become needed. • I firmly believe the school should be reopened and remain open • Should be reopened due to the amount of kids attending other schools • Milton Primary school has always been the heart of the community. It is incredibly sad that future generations may not be able to attend their local school when there is a perfectly viable option available for them within the village. • I think it should be considered to stay open due to the village and surrounding areas having future plans for more houses to be built which will increase the population in the village and also surrounding areas which will see an impact on the schools • Closing and repurpose the building for other uses, or sell. 	

1.33 In summary, fewer than 15 parent/carers or other stakeholders attended the 2 engagement sessions and 12 stakeholders completed the online questionnaire with responses shown above. 2 of those that completed the response form also attended the information sessions. In addition, one comment was received in writing from a stakeholder, outwith the Milton of Balgonie Primary School catchment area, wishing to submit a placing request to Milton of Balgonie Primary School should the school be reopened.

2 The Proposal

2.1 The proposal is to:

- a) close Milton of Balgonie Primary School on Monday 19 August 2024.
- b) rezone the catchment area of Coaltown of Balgonie Primary School to incorporate all the current catchment area of Milton of Balgonie Primary School, from Monday 19 August 2024.
- c) rezone the catchment areas of Pitteuchar East and Thornton Primary Schools, to realign these primary school catchments from 28 June 2024.

2.2 This proposal will also require Fife Council to consider/seek alternative uses for the Milton of Balgonie Primary School site.

2.3 After the consultation, a consultation report will be submitted to a future meeting of the Cabinet Committee. If approved, the closure and changes to the catchment areas would be implemented from the dates outlined in 2.1. Nursery aged pupils transferring to Primary 1 in August 2024 would enrol in their existing catchment primary school in January 2024. The new primary catchment areas would take effect from Monday 19 August 2024 for Coaltown of Balgonie Primary School and from 28 June 2024 for Pitteuchar East and Thornton Primary School pupils.

2.4 The existing mothballing arrangements will continue until the outcome of the statutory consultation process is decided.

2.5 Any new pupil who moves into the catchment area should contact Coaltown of Balgonie Primary School where they will be offered a place, if there is space within the current class organisation.

2.6 For any primary one pupil due to start in August 2024, they will be able to enrol for primary education in January 2024. The online system will verify catchment area and any pupil living in the Milton of Balgonie Primary School catchment area will be contacted by staff within Coaltown of Balgonie Primary School.

3 Contextual Analysis

3.1 Guiding Principles

3.1.1 The Council has set a number of guiding principles for reviewing the school estate, which were agreed by the Council's Executive Committee on 2 October 2012, following a Fife school review, and more recently at the Education & Children's Services Committee on 28 August 2018:

- (a) Every school should be rated as 'A' or 'B' for both condition and suitability, to include a number of accessible schools in each geographical area.

- (b) Schools should have an occupancy rate greater than 60% of capacity and, in order to ensure equity in provision, schools should be operating within an optimal occupancy and efficiency range of 80-100%. Consideration should be given to establishing a minimum number of pupils in any school which is less than 5 miles from another school; therefore, schools should have a minimum of 3 classes, recognising that effective learning requires interaction between pupils. This group activity is most effective when children are of a similar age and, to enable this, where possible schools should have a minimum roll of 50 pupils.
- (c) A strategy for a sustainable school estate should support the progressive reduction in the overall carbon footprint for the Council.

3.2 **Review Factors**

3.2.1 The factors considered in the review of the school estate include:

- Educational benefits
- Condition surveys
- Suitability assessments
- Recent investment in school buildings
- Energy performance data
- School roll projections and capacities
- Catchment areas, including impact of Strategic Development Allocations and Local Development Plans
- Cost per pupil
- Distance to nearest school
- Best Value model for existing Public Private Partnership (PPP) contracts i.e. increasing occupancy.

3.3 **New Housing Developments within Milton of Balgonie, Coaltown of Balgonie, Pitteuchar East and Thornton Primary School Catchment Areas**

3.3.1 Fife Council adopted the Fife Local Development Plan (FIFEplan) on 21 September 2017, following a review by the Scottish Government. This plan sets out the planning policies and proposals for the development and use of land across Fife.

3.3.2 The roll projection model includes methodology to identify pupil numbers from new housing development sites that are included in the Housing Land Audit (HLA). The HLA report is published annually and provides the most up to date information on site status, including whether sites have planning consent, are under construction, have no consent or indeed whether there are any constraints such as marketing or no interest demonstrated by a developer.

3.3.3 The latest publication of the Housing Land Audit, dated 2022, presents the Balfour Place/Main Street site in Milton of Balgonie as a non-effective site. This site had previously been shown within the Housing Land Audit 2021 publication, with projected phasing of 6 units built within 2025 and 51 units built post 2026. The site has an estimated capacity of 63 units in the Milton of Balgonie Primary School catchment area. Subsequently, a planning application has been received for this site (ref. 23/00231), however, no planning consent has been granted. The planning application has suggested that construction would commence in the latter part of 2023, for 30 units, with the remaining 33 units in 2024/25.

- 3.3.4 In the Coaltown of Balgonie Primary School catchment area there are 3 sites listed in the local development plan. One of these sites, Queens Meadow, (ref. 22/04156/Full) has received planning permission for 80 units, and the S75 agreement has been signed. A planning application for the second site, which is land to the south of Millburn Avenue (ref. 23/00997/Full), has been submitted for 102 units and is currently being assessed by statutory consultees. This site has not yet received planning consent and it is not currently included in the Housing Land Audit; however, it has been included in updated school roll projections. There has been no planning application received for the remaining site, at Pytree Road North, for 23 units. This site is non effective and is therefore not included in school roll projections. The two effective sites (i.e. Queens Meadow and Millburn Avenue) have submitted planning applications which total 44 units above the site capacity detailed in the Local Development Plan.
- 3.3.5 Westwood Park (GLE102) is a strategic development area for 420 units, which currently extends into both Pitteuchar East and Coaltown of Balgonie Primary School catchment areas. Due to the geographical location of the site, it is anticipated that all the pupils from this new housing development should be accommodated within Pitteuchar East Primary School. This site is under construction, with a phasing of 24 units per year over a 15-year period (2022-2039). A number of these new homes have been completed and are occupied.
- 3.3.6 A planning application for the first 300 units of a Strategic Development Area (SDA) site within the Thornton Primary School catchment area has been received (ref. 20/01156/PPP). Although new pupils from the first 300 units can be accommodated, together with the pupils from the Lochtyview development, an extension to Thornton Primary School is required for the pupils from the additional 600 units, for which an education solution has been developed, to be fully funded by the developers. There is no planning consent for either of these applications to date.

4 Milton of Balgonie Primary School - The Case for Closure

4.1 Milton of Balgonie - Background Information

- 4.1.1 Milton of Balgonie Primary School is a small rural school with a maximum capacity for 75 pupils. The school roll for Milton of Balgonie Primary School steadily declined over a period of 9 years and for the last 4 academic sessions no pupils have enrolled in the school. There are approximately 204 residential homes in the Milton of Balgonie catchment area. The previous rolls and occupancy rates were as follows:

School Year	School Roll	Capacity	Occupancy
2023	0	75	0%
2022	0	75	0%
2021	0	75	0%
2020	0	75	0%
2019	0	75	0%
2018	14	75	19%
2017	23	75	31%
2016	26	75	35%
2015	26	75	35%
2014	24	75	32%
2013	27	75	36%
2012	29	75	39%

- 4.1.2 For academic session 2018/19 the school roll at Milton of Balgonie Primary School, of 14 pupils, consisted of 9 catchment pupils and 5 placing requests. There were 3 pupils who had no peers at the same primary stage. At the end of that academic session, 3 primary 7 pupils moved to secondary school and the remainder of the pupils moved to other primary schools for session 2019/20 as a result of parental choice. Therefore, in academic session 2019/20 there was one catchment pupil, due to start Primary 1, who would attend the school. Following the enrolment discussion with the Headteacher, this family enrolled at Coaltown of Balgonie Primary School. At that point it was accepted that the school would not be operational in August 2019.
- 4.1.3 The analysis of the September 2022 pupil census data highlights there were 12 pupils living in the Milton of Balgonie Primary School catchment area. 7 of these 12 were enrolled within Coaltown of Balgonie Primary School and the other 5 chose alternative primary schools in the area, including denominational provision. The one expected primary 1 pupil for session 2023/24 has not enrolled at Coaltown of Balgonie Primary School, submitting a placing request for an alternative school.
- 4.1.4 From the nursery information, there are fewer than 5 pupils enrolled in nursery provision from the Milton of Balgonie Primary School catchment area.
- 4.1.5 Information provided by the NHS (Community Health Index record of births up to 28 February 2023) has been used to identify the number of births in the Milton of Balgonie Primary School catchment area, showing those pupils who would be due to start school in the next 4 years. This figure is a snapshot of residence at birth and is subject to change, where families may relocate into and out of a school catchment area. These are listed below:

August 2023	Fewer than 5 pupils
August 2024	Fewer than 5 pupils
August 2025	Fewer than 5 pupils
August 2026	Fewer than 5 pupils
August 2027	Fewer than 5 pupils

- 4.1.6 Prior to mothballing the school, the Education Service held a meeting with parents/carers, in January 2020, to outline the position. The Education Service monitored the school roll and reviewed the number of nursery pupils eligible to commence P1 in August 2020. None of the parents of nursery pupils formally requested a place for Primary 1 in Milton of Balgonie Primary School. The Education Service subsequently wrote to parents/carers of pupils living in the Milton of Balgonie Primary School catchment area to advise moving forward with a formal committee paper seeking approval to mothball the school. The Education Service did not receive any concerns in writing by parents.
- 4.1.7 Milton of Balgonie Primary School has been mothballed formally since January 2021 and has not been operational with staff and pupils since July 2019. The school building is currently being maintained by Property Services, to ensure it is wind and watertight and all resources have been removed from the building, to comply with Risk Management guidance. There has been no formal request from parents to enrol any pupils in Milton of Balgonie Primary School for academic session 2020/21, 2021/22, 2022/23 or 2023/24.
- 4.1.8 The transfer of existing pupils to Coaltown of Balgonie Primary School, prior to academic session 2019/2020, was managed appropriately by Education and Children Service's Directorate staff, school staff and parents/carers, to ensure that children were supported through their transition of moving from one school to another. School staff supported the pupils, who moved from Milton of Balgonie Primary School to Coaltown of Balgonie Primary School in August 2019, to integrate into their new class setting and establish new friendships.

- 4.1.9 To date, the current Headteacher has not received any concerns from parents regarding the learning experience of Milton of Balgonie pupils within Coaltown of Balgonie Primary School. Parents of pupils from Milton of Balgonie have been very supportive and are happy with the current arrangement, as the small number of pupils have a larger peer group within each of the primary stages.
- 4.1.10 Although Milton of Balgonie Primary School had a small area used for pupil dining, the school was not used for any (non-school) community activities during academic sessions 2016/17, 2017/18 and 2018/19. During the time the school was operational, Milton of Balgonie Primary school did not run a breakfast or after school club for pupils.
- 4.1.11 A community centre is situated on Dickson Lane, which is used by local residents for community activities, as well as used for voting during local elections. This is located 0.16 miles (250 metres) from Milton of Balgonie Primary School.

4.2 **Milton of Balgonie – A Rural School**

- 4.2.1 Milton of Balgonie Primary School is classified as an accessible rural school, based on the criteria applied by the Scottish Government. As a result of this classification, and because fewer than 70 children were attending the school up until August 2019, the local authority received additional funding of £2900 per pupil per annum as a contribution to the higher cost of educating children in such settings.
- 4.2.2 As Milton of Balgonie Primary School is a rural school, when formulating this proposal the Council is required to:
- i. Identify the reasons for formulating the proposal, and
 - ii. Consider whether there are any reasonable alternatives to the proposal as a response to those reasons.
- 4.2.3 In addition, to para 4.2.2, in the proposal the Council must also give special regard to:
- i. The likely effect on the local community in consequence of the proposal (if implemented), and
 - ii. The likely effect caused by any different travelling arrangements that may be required in consequence of the proposal (if implemented).

4.3 The reasons for formulating the proposal

- 4.3.1 The Schools (Consultation) Scotland Act 2010 states that education authorities must identify the reasons for formulating a proposal to close a rural school. This proposal was formulated for the following reasons:
- (a) Milton of Balgonie Primary School has had no pupils enrolled for academic sessions 2019/20, 2020/21, 2021/22 and 2022/23.
 - (b) There are no pupils enrolled in Milton of Balgonie Primary School for session 2023/24. The one pupil due to enrol for primary 1, living in the catchment area, has chosen to attend an alternative school following a placing request application. Overall, the current number of primary age pupils living in the Milton of Balgonie catchment area is less than 10.
 - (c) Milton of Balgonie Primary School has been mothballed since January 2021. The school building is currently being maintained by Property Services to ensure it is wind and watertight.

- (d) Updated birth information has shown that the births in the catchment area have not significantly increased in the last year and there is no other anticipated significant increased growth in the pupil population in the catchment area from, for example, large scale housing development of over 100 units.
- (e) Milton of Balgonie Primary School does not meet two of the Fife Council guiding principles as outlined in para. 3.1.

4.4 Reasonable alternatives to the proposal as a response to those reasons

4.4.1 The Education Service is required to consider whether there are any reasonable alternatives to the proposal when considering the reasons for the proposal provided above.

4.4.2 Continued Mothballing of Milton of Balgonie Primary School

4.4.3 As contained within the Schools (Consultation) (Scotland) Act 2010 Statutory Guidance, mothballing is an alternative to closure for local authorities. The term 'mothballing' is used to refer to a temporary decision to close a school where the roll has fallen to zero. Mothballing, rather than closing a school, gives the opportunity for it to reopen should circumstances change. The decision to mothball the school was taken in January 2021, as a temporary measure, as an alternative to full closure. Full closure would require statutory consultation in accordance with the Schools (Consultation) (Scotland) Act 2010 and a decision following the consultation.

4.4.4 In circumstances where a school is mothballed rather than closed and some children and young people remain in the catchment area, this decision should be taken in consultation with parents involved, and the possibility should be raised as early as possible.

4.4.5 The Education Service arranged a meeting for any parent affected by the declining school roll in January 2020 and subsequently wrote to all parents advising them that as no pupils had requested to enrol at Milton of Balgonie Primary School for session 2020/21, the Education Service would take forward a paper to the Education & Children's Services Sub-Committee (on 26 January 2021) to seek approval to mothball the school.

4.4.6 The Education & Children's Services Sub-Committee, on 26 January 2021, considered the recommendation to mothball Milton of Balgonie Primary School as the school had had no pupils enrolled for the academic session from August 2020. The Committee Decision of 26 January 2021 was:

- (a) to Mothball Milton of Balgonie Primary School with immediate effect.
- (b) that during the mothballing period, any children wishing to enrol at Milton of Balgonie Primary School will be offered a place at Coaltown of Balgonie Primary School and provided with free transport if they meet the distance criteria.
- (c) that the resources and furniture within the school be offered to surrounding schools; and
- (d) that a further report reviewing the decision be considered by the Sub-Committee in September 2021.

- 4.4.7 The school has been mothballed since 26 January 2021. The school building is currently being maintained by Property Services to ensure it is wind and watertight. There has been no attempt by parents to seek the reopening of Milton of Balgonie Primary School for academic sessions 2020/21 or 2021/22, 2022/23 or 2023/24. All pupils in this area have enrolled at Coaltown of Balgonie Primary School or other schools.
- 4.4.8 The decision to mothball in January 2021 was reviewed in November 2021, June 2022 and November 2022. This proposal paper reflects the outcome of the further review of the decision to mothball the school, which is to proceed with this proposal to close Milton of Balgonie Primary School and rezone the catchment area of Coaltown of Balgonie Primary School.
- 4.4.9 The Statutory Guidance provides, at paragraph 64, “Mothballing is only appropriate for a temporary period and should be subject to regular review, at least annually, against the same requirements which led to the original decision to mothball the school. The maximum length of its duration is likely to depend on the location of the school and the desirability of maintaining capacity to re-open a school there, but it is unlikely that it should exceed 3 years in areas that are not very remote.”
- 4.4.10 The Education Service does not consider that continuing with the current mothballing arrangements is a reasonable alternative to the proposal as a response to the reasons for formulating the proposal. It would not be in the interests of the pupils and wider community to continue with the existing mothballing arrangements. To retain a building, which is empty and not in operation, for another year, would require Fife Council to continue to ensure security, undertake repairs and sustain maintenance contracts. Where there are no anticipated enrolments of pupils, continued mothballing of the school is not justified.**
- 4.4.11 Milton of Balgonie Primary School to reopen
- 4.4.12 Pupil enrolment trend data demonstrates that the parent/carers within the Milton of Balgonie village have chosen to make placing requests to other schools over the last number of years and therefore the parents have chosen their preferred primary provision. The school roll at September 2018 census was 14 pupils (19% occupancy). Fife Council believes that whilst the school was in operation with 14 pupils, the educational experience would be different to other schools with a higher occupancy and larger peer group and that the Milton of Balgonie Primary school catchment pupils are now benefitting from being part of a larger school. There is no mechanism available to Fife Council to increase the school roll.
- 4.4.13 The parents who attended the parents’ meeting in January 2020 were disappointed that the school roll could not be sustained in Milton of Balgonie Primary School. However, the parents/carers have acknowledged that at Coaltown of Balgonie Primary School there is a larger peer group to support pupils. The current Headteacher has advised that there is no suggestion by parents that they are not happy with the education provision on offer within Coaltown of Balgonie Primary School. Parents have advised that their children are thriving within this learning environment.
- 4.4.14 Based on the school roll, from September 2022 census, there were fewer than 10 pupils living within the Milton of Balgonie Primary School catchment area attending Coaltown of Balgonie Primary School.

- 4.4.15 The table below shows the school roll, year on year, if all the projected pupils from the Milton of Balgonie Primary School catchment area attended the school. (This does not include the current catchment pupils who are enrolled in another primary schools). This projection does not include pupils from new housing and has been determined by a trend of births in the catchment area.

2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
1	2	5	6	8	10	12	13	14	13	13	13

- 4.4.16 The following table details the projected roll, year by year, for Milton of Balgonie Primary School with new pupils from the one development site of Balfour Place/Main Street for 63 units, if all the catchment pupils attended and the births materialised at the existing Fife average rate per housing unit. The house build has been factored in for 2023, with new pupils joining in 2024.

2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
1	12	24	25	25	25	25	24	22	19	19	19

- 4.4.17 Pupil enrolment trend data indicates that it is highly unlikely that all projected pupils would actually enrol in Milton of Balgonie Primary School, if it were to reopen.

- 4.4.18 Should a decision be made to reopen Milton of Balgonie Primary School, there would be no requirement for current primary age pupils living in the Milton of Balgonie Primary School catchment area, currently enrolled in Coaltown of Balgonie Primary School or any other primary school, to enrol at Milton of Balgonie Primary School. As outlined in para 4.3.1 (c), there has been no formal communication to suggest that parents would move back should the school be reopened. If the school were to reopen for during session 2023/24, there would be:

- (a) 11 pupils living in the catchment area for session 2023/24, including those currently attending denominational primary school
- (b) no pupils at primary 6 stage
- (c) one class with all pupils taught in a composite class ranging from P1 to P7.
- (d) this would be at the cost of a minimum of £105,000 to the council to reopen the school, excluding ICT, education resources and furniture to support the flexible design of learning spaces to meet the differing needs of all learners.

- 4.4.19 **The Education Service does not consider that the reopening Milton of Balgonie Primary School is a reasonable alternative to the proposal as a response to the reasons for formulating the proposal. It would not be in the interests of the pupils and wider community to reopen because the projected pupil roll (based on birth rates and known pupils living in the catchment area) falls short of one of the guiding principles.**

- 4.4.20 Consideration of the rezoning of the nearest primary schools' catchment areas

- 4.4.21 There are 2 other schools in close proximity to Milton of Balgonie Primary School, where consideration could be given to rezoning their catchment areas to increase the occupancy of Milton of Balgonie Primary School. The closest primary schools to Milton of Balgonie Primary School are:

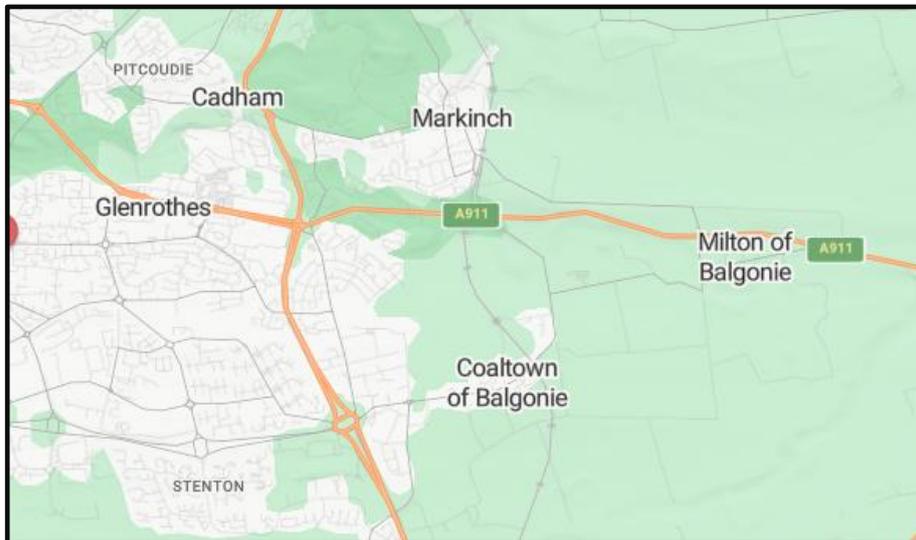
- (a) Coaltown of Balgonie Primary School (1.7 miles)
- (b) Balcurvie Primary School PS (1.8 miles)

- 4.4.22 (a) Coaltown of Balgonie Primary School
- 4.4.23 Coaltown of Balgonie Primary School is located 1.7 miles from Milton of Balgonie Primary School, with a published capacity for 100 pupils. In accordance with the committee decision of 26 January 2021, any pupil of school age currently living in the Milton of Balgonie Primary School catchment area, or any new pupils to the village, are advised Coaltown of Balgonie is their local school. The small number of pupils currently living in the Milton of Balgonie Primary School catchment area have been accommodated in Coaltown of Balgonie and integrated within the school.
- 4.4.24 To increase the occupancy of Milton of Balgonie Primary School to meet our guiding principles, at least 51 pupils would need to enrol at the school, to increase the occupancy to more than 2 classes. This would result in the closest school, Coaltown of Balgonie, then reducing to 2 classes. By reducing the catchment area of Coaltown of Balgonie Primary School in this way, this could result in the operation of 2 small schools, neither of which would meet the guiding principles set out in para. 3.1 above.
- 4.4.25 Reducing the catchment area of Coaltown of Balgonie Primary School, by rezoning part of the catchment to Milton of Balgonie Primary School, would, therefore, affect the long-term sustainability of Coaltown of Balgonie Primary School. It would not be practicable to rezone properties from Coaltown of Balgonie Primary School catchment area to Milton of Balgonie Primary School, as this could result in a declining school roll and occupancy for Coaltown of Balgonie in the long term, based on the current trends.
- 4.4.26 In addition, an increased number of pupils would require transport to Milton of Balgonie Primary School. This scenario would result in an increased revenue cost for the Education Service, by procuring a larger vehicle to transport pupils from Coaltown of Balgonie to Milton of Balgonie Primary School. At present the vehicle(s) transport fewer than 10 pupils from Milton of Balgonie to Coaltown of Balgonie. It would also take away the opportunity to build independence for those Coaltown of Balgonie Primary School pupils who currently walk to school.
- 4.4.27 The Education and Children Service's Directorate believes that being part of a larger school will enable both the existing pupils living in the Coaltown of Balgonie Primary School catchment area and those pupils from Milton of Balgonie catchment area attending Coaltown of Balgonie Primary School to continue to benefit from an enhanced range of curricular experiences, providing more opportunities to become successful learners, confident individuals, effective contributors and responsible citizens.
- 4.4.28 Decreasing the pupil population for Coaltown of Balgonie Primary School will, over both schools, increase the number of pupils educated in classes organised in a broader range of school years (e.g. P1 - P4 instead of P1/2). This will limit the ability for targeted teacher planning, taking account of the 7 principles of Curriculum for Excellence design, ensuring learner's experience a coherent curriculum across all 4 contexts (opportunities for personal achievement, interdisciplinary learning, ethos and life of the school and Curriculum areas and subjects). It will also reduce the opportunities for children to collaborate during planned learning activities and reduce the ability to adapt the learning environment to more closely reflect the age and stage of the pupils learning within it.
- 4.4.29 Composite class organisation spanning 3 or more primary year groups provides fewer opportunities for planned and focused collaborative and cooperative learning activities, undermining a more rigorous development and progression of pupils' skills and knowledge. Importantly, pupils will have fewer opportunities to learn with and from their similar age peers. They will have fewer opportunities to consolidate and extend their learning, articulate arguments, explore new ideas and find creative solutions to problems within groups of their peers.

- 4.4.30 **The Education Service does not consider rezoning part of the catchment area of Coaltown of Balgonie Primary School to Milton of Balgonie Primary School a reasonable alternative to the proposal as a response to the reasons for formulating the proposal. It would not be in the interests of the pupils and wider community to rezone pupils from another community to sustain Milton of Balgonie Primary School. It would not provide any educational benefits to the children living in the catchment areas of either Milton of Balgonie Primary School or Coaltown of Balgonie Primary School.**
- 4.4.31 (b) Balcurvie Primary School
- 4.4.32 Balcurvie Primary School has a maximum capacity of 217 pupils, distributed across 7 classrooms, and could also accommodate the small number of catchment pupils from Milton of Balgonie Primary School. However, there is temporary modular accommodation on site. It would be the intention of the Education Service to remove this accommodation once the school roll declines to 5 classes. This would remove the long-term requirement to sustain temporary modular accommodation and reduce the accommodation footprint on site, thus providing a saving on energy for the Council.
- 4.4.33 Balcurvie Primary School is part of a different secondary school cluster and is associated with Levenmouth Academy. For this reason alone, it would not be an appropriate option to rezone pupils from the Balcurvie Primary School catchment area to Milton of Balgonie Primary School catchment area.
- 4.4.34 Balcurvie Primary School is located 1.5 miles from Milton of Balgonie and can be accessed off the busy A911. The A911 to and from Milton of Balgonie village to Balcurvie is a main commuter route from Glenrothes to Leven and the speed limit is 60 mph with no pedestrian footpaths.
- 4.4.35 Rezoning some of the properties within this catchment area would result in additional revenue expenditure for the Education Service. At present there are very few pupils transported to Balcurvie Primary School, as most residential houses are within the one-mile criterion and therefore pupils will be walking to school. This would result in additional revenue expenditure for the Education Service, to provide free transport, whilst currently most Balcurvie Primary School pupils are able to walk to their primary school.
- 4.4.36 This option would result in a number of pupils travelling past Balcurvie Primary School to attend Milton of Balgonie Primary School. This option would also take away the opportunity to build independence for those Balcurvie Primary School pupils who currently walk to school.
- 4.4.37 **The Education Service does not consider rezoning part of the catchment area of Balcurvie Primary School to Milton of Balgonie Primary School a reasonable alternative to the proposal as a response to the reasons for formulating the proposal. It would not be in the interests of the pupils and wider community to rezone pupils from another community to sustain Milton of Balgonie Primary School. It would not provide any educational benefits to the children living in the catchment areas of either Milton of Balgonie Primary School or Balcurvie Primary School.**
- 4.5 The likely effect on the local community
- 4.5.1 The local community has been defined in three ways, as demonstrated in Appendix 3.

- 4.5.2 The first community considered is the school community. The existing school community of Milton of Balgonie has already become part of a larger, sustainable school community and as such brings together all the children within the Coaltown of Balgonie community. The Parent Council of Milton of Balgonie Primary School was made up of a number of parents/carers of the last P7 stage, whilst in operation. As the P7 pupils moved on to Secondary School, the number of parents reduced. Coaltown of Balgonie Parent Council would welcome more parents onto the Parent Council. This Parent Council meets regularly over the course of an academic session. Neither school community has previously had any significant engagement or links to the joint Coaltown of Balgonie and Milton Community Council, however links are made with the community hall where activities have been undertaken. The Headteacher of Coaltown of Balgonie now regularly attends any Community Council meetings.
- 4.5.3 As stated above, the school community made no use of the school building for activities involving the local community, and no impact in this respect is anticipated.
- 4.5.4 The second community considered is the Milton of Balgonie village community. This community makes no use of the school building for community activities. The community can make use of a village hall situated on Dickson Lane, approximately 250 metres from the school, and implementation of the proposal would therefore not affect the holding of community events in the village. It is the view of the Council that the loss of the school premises would not adversely affect the community. The school, prior to mothballing, did not have any links with the Community Council.
- 4.5.5 If the proposal is implemented, it is the view of Fife Council that the sustainability of the Milton of Balgonie village community will not be affected and the community will continue. Children will continue to live in the community and will attend a school fewer than 2 miles from their existing school. In August 2018, the Headteacher of Coaltown and Milton of Balgonie Primary Schools worked to enhance the link between the two communities. Combined activities such as woodland visits, school excursion to Ardoy for P7 pupils, special assemblies once a term, where Milton of Balgonie pupils would join pupils at Coaltown of Balgonie, and peer mediation training, commenced. This allowed pupils and parents/carers an opportunity to hear about the joint activities and provided the pupils a broader school experience.
- 4.5.6 It is also the view of Fife Council that there will be no significant impact on the desire for housing in the area. The expected number of pupils, from new housing and natural births in this catchment area, is likely to have no significant impact for the Education Service and would not be likely to lead to refusal of support for any planning application. The proposed extension to Coaltown of Balgonie Primary School is as a direct result of the new housing in the Coaltown of Balgonie Primary School catchment area. The one site within Milton of Balgonie Primary School and the existing pupils living in the area from births, can be accommodated in Coaltown of Balgonie Primary School, prior to this the housing in Coaltown of Balgonie coming forward. However, with the new housing consented in the Coaltown of Balgonie Primary School catchment area, the number of pupils from all the new housing sites will require to be monitored.
- 4.5.7 A more detailed analysis of local community impact is provided in section 12.
- 4.5.8 Finally, the wider community of which Milton of Balgonie village is a part, will benefit from the development of a more sustainable school estate, with a reduction in the revenue costs due to under-occupation and maintenance of a council asset. The longevity of the remaining schools will be improved, providing stability to the area. There will be no impact on the use of shops, services and facilities in this wider community by residents of the Milton of Balgonie community because of the closure of Milton of Balgonie Primary School.

- 4.5.9 If the proposal is implemented, Fife Council does not consider that there will be any adverse effect on the local community, whether defined as the school community, the village community or the wider rural community surrounding the village of Milton of Balgonie. Overall, Fife Council considers that there will be a positive effect on the local community.
- 4.5.10 The picture¹ below demonstrates the close proximity of Milton of Balgonie to other communities in the Glenrothes area.



4.6 The likely effect caused by any different travelling arrangements

- 4.6.1 Coaltown of Balgonie Primary School is situated 1.7 miles from Milton of Balgonie Primary School. Primary age pupils who live more than one mile from their catchment school are entitled to free transport under the present Fife Council policy. As a result of pupils moving at the end of session 2018/19, Fife Council offered all parents residing in the Milton of Balgonie Primary School catchment area, who were already attending Coaltown of Balgonie Primary School because of a placing request, and any new pupils, free transport to Coaltown of Balgonie Primary School. For those pupils who meet the distance criteria, this arrangement will continue for their school duration. The journey time from Milton of Balgonie Primary School to Coaltown of Balgonie Primary School is less than 10 minutes by mini-bus or car, and whilst there will be variations in this for some pupils, Fife Council does not consider that there will be any significant adverse effects as a result of this proposal. There will be a small environmental impact of bussing all the Milton of Balgonie pupils who may have previously walked to school.
- 4.6.2 It is unlikely that the arrangements school staff make to get to school will change in any significant way. There is unlikely to be any environmental impact arising from the arrangements staff make to get to school.
- 4.6.3 Other users of the school premises or facilities will not be affected in relation to transport arrangements. The village hall is approximately 250 metres from the school. There were no other users of the school premises prior to the mothballing of Milton of Balgonie Primary School and therefore there is no effect on transport.
- 4.6.4 **Therefore, the Education Service has concluded that there is no reasonable alternative to the proposal to close Milton of Balgonie Primary School and rezone the catchment area to Coaltown of Balgonie Primary School. The rezoning of**

¹ Map courtesy of Bing Maps

Coaltown of Balgonie Primary School catchment area will sustain the long-term school roll at Coaltown of Balgonie Primary School, as well as meet the occupancy rate of above 60% and allow Coaltown of Balgonie Primary School to continue to operate with more than 3 Primary classes. Implementation of the proposal to close Milton of Balgonie Primary School is the most appropriate response to the reasons for this proposal as outlined above at paragraph 1.27 and 4.3.1.

5. Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools - The Case for Rezoning the Catchment Areas

5.1 Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools are not classified as rural schools in accordance with the Scottish Government Rural Schools Classification dated October 2021.

5.2 Coaltown of Balgonie Primary School

5.2.1 Coaltown of Balgonie Primary School is the nearest primary school to the Milton of Balgonie village and is also located in a small village. Coaltown of Balgonie Primary School is situated 1.7 miles from the Milton of Balgonie Primary School building and the journey from school to school takes less than 10 minutes by mini-bus or car. There are currently approximately 731 residential homes in the Coaltown of Balgonie catchment area. Pupils from the Milton of Balgonie Primary School catchment area, who have attended Coaltown of Balgonie Primary School in the last 3 academic sessions, have helped sustain the roll at Coaltown of Balgonie. The school has also accepted approximately 20 placing requests across P1-P7 (excluding the pupils from Milton of Balgonie). There have also been 18 pupils across all primary stages who have chosen to attend other schools.

Academic Year	School Roll	Academic Year	School Roll
2023	99	2017	75
2022	102	2016	79
2021	95	2015	83
2020	89	2014	88
2019	83	2013	96
2018	81	2012	96

5.2.2 There are 3 development sites within the Coaltown of Balgonie Primary School catchment area listed in the local development plan. One of these sites has planning consent with a signed S75 legal agreement. The other site has no planning consent and the remaining site is classed as non-effective.

5.2.3 A one classroom extension is a requirement to accommodate the projected increase pupil roll as a result of planned housing development. This extension would still be required with or without the small number of pupils from the Milton of Balgonie catchment area.

5.2.4 The accommodation for Coaltown of Balgonie Primary School is situated in 2 separate buildings in close proximity to each other. The infant building has one classroom and a dining/gym hall, while the main building has 4 classroom spaces, with one currently allocated as a multi-purpose room, as well as office accommodation. The published pupil capacity within Coaltown of Balgonie Primary School is 100 pupils, consisting of 4 composite classes of 25 pupils. However, there is a 5th (multi-use) space which can be used to accommodate an increase to the pupil roll if required, up to 125 pupils. This was the case in session 2022-23.

- 5.2.5 The school roll at Coaltown of Balgonie Primary School was recorded as 102 pupils in the September 2022 census, with an occupancy of 102%. The figures above include pupils from the Milton of Balgonie Primary School catchment area who made placing requests to Coaltown of Balgonie Primary School prior to session 2019/20, when the school was last operational. The school roll for Coaltown of Balgonie Primary School for session 2023/24 is 99 pupils, accommodated within 4 teaching spaces. This allows the multi-use area to be used flexibly, to deliver aspects of the curriculum, for session 2023/24.
- 5.2.6 For session 2022/2023, there were 28 nursery aged pupils living in the Coaltown of Balgonie Primary School catchment area attending nursery provision across the Glenrothes area. For session 2023/24 there are 26 nursery aged pupils living in the Coaltown of Balgonie Primary School catchment area due to attend nursery provision across this area. The figures included N4 and N5 pupils.
- 5.2.7 The addition of Milton of Balgonie Primary School catchment pupils into the Coaltown of Balgonie Primary School catchment area would help to ensure the continued sustainability of this school roll, with more than 50 pupils, 3 classes and an occupancy over 60%, thus continuing to meet the guiding principles as set out in para 3.1.
- 5.2.8 School roll projections for Coaltown of Balgonie Primary School, based on the 2022 pupil census, indicate that Coaltown of Balgonie Primary School is expected to decline over a 10-year period to an occupancy of 65% in 2033 (without any additional pupils from new housing sites or Milton of Balgonie pupils).

Year	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Roll	98	100	88	87	83	75	69	70	66	65	65	63
Capacity	100	100	100	100	100	100	100	100	100	100	100	100
Classes	4	4	4	4	4	4	4	4	4	4	4	4

- 5.2.9 The projected school roll (based on the 2022 pupil census) of Coaltown of Balgonie Primary School (excluding new Milton of Balgonie pupils) is as follows. This projection includes the following housing sites:
 Queens Meadow – 80 units (planning consent granted May 2023)
 Millburn Avenue – 102 units (no planning consent)
 Main Street, Milton of Balgonie – 63 (no planning consent)

Year	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Roll	98	117	120	136	144	144	130	123	112	103	96	92
Capacity	100	100	100	100	100	100	100	100	100	100	100	100
Classes	4	5	5	6	6	6	6	5	5	5	4	4

- 5.2.10 Although the roll projection shown above illustrates that Coaltown of Balgonie Primary School will exceed the 4 classes and 100% occupancy, this is based on an average pupil product across Fife. Based on new housing within the Milton of Balgonie Primary School catchment area previously, it is not expected that the average pupil product would manifest from this development site.
- 5.2.11 As a result of additional units that have been consented, over and above the local plan threshold, the Education Service has requested contributions to mitigate the capacity risk at Coaltown of Balgonie Primary School. This capacity risk is purely associated with these new housing developments. The contributions will be used to provide a one classroom permanent extension to the building. The recent application for housing at Millburn Avenue is also in excess of the Local Plan Development capacity and, therefore, this application would also be expected to contribute to a permanent solution at Coaltown of Balgonie Primary School.

5.2.12 Although the above table in 5.2.8 demonstrates that the school is expected to exceed the maximum capacity of 100 pupils, the multi-purpose room and a planned extension to the school would ensure that all pupils from the Coaltown of Balgonie Primary School and Milton of Balgonie Primary School catchment areas can be accommodated within the accommodation at Coaltown of Balgonie Primary School. These figures do not show the projected number of pupils that would potentially move out from Coaltown of Balgonie Primary School catchment area to Pitteuchar East and Thornton Primary Schools should the proposal be approved.

5.2.13 The school roll projections showing Coaltown of Balgonie Primary School, with projected pupils from Milton of Balgonie Primary School, and include the projected new pupils from the 3 housing developments listed in 5.2.7 are shown below. These figures do not show the projected number of pupils, from the Lochtyview area, that would potentially move out from Coaltown of Balgonie Primary School catchment area to Pitteuchar East and Thornton Primary Schools should the overall proposal be approved. Whilst the projections show the small possibility of children being required to be taught by 7 class teachers, this would not require 7 different learning spaces due to the learning spaces being able to accommodate 30 pupils. This would be an acceptable short-term solution.

Year	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Roll	99	119	125	142	152	154	142	136	126	116	109	105
Capacity	100	100	100	100	100	100	100	100	100	100	100	100
Classes	4	5	5	6	7	7	6	6	6	5	5	5

5.2.14 The proposed extension to Coaltown of Balgonie Primary School for August 2025, is as a direct result of the new housing in the Coaltown of Balgonie Primary School catchment area. The one site within Milton of Balgonie Primary School and the existing pupils from births, could have been accommodated in Coaltown of Balgonie, prior to this housing coming forward.

5.2.15 However, these projected pupil numbers included in 5.2.7 and 5.2.11 include all projected pupils currently within the Coaltown of Balgonie and Milton of Balgonie catchment areas, while the full proposal includes the option to realign the primary school catchment areas of Pitteuchar East and Thornton Primary Schools. This option will remove some addresses from the Coaltown of Balgonie projected numbers, allowing the occupancy of this school to be managed within the proposed accommodation.

5.2.16 There is planned housing development within the Local Development Plan within Milton of Balgonie Primary School catchment area, which may have reversed a declining school roll should this site have come forward at the time, it was included in the 2015 Housing Land Audit. An application for 63 units has been received (ref. 23/00231/Full) with construction due to commence in the later part of 2023 and 2024/25. This site does not have planning consent. As detailed in section 3.3, this housing site has been available for construction since 2015 and phasing detailed within the Housing Land Audit 2021 is highlighted as 2025/2026 for the development. This site was not included in the Housing Land Audit 2022. As outlined in section 5.2.11, the new pupils from the Milton of Balgonie Primary School would have been able to be accommodated within Coaltown of Balgonie Primary School, prior to the 2 new applications.

5.2.17 There is no nursery provision on site at Coaltown of Balgonie Primary School. The local nurseries for pupils living in Milton of Balgonie are situated at either: Carleton Nursery, Ladybird Nursery and within the primary schools of Pitteuchar East, Pitteuchar West, Collydean, Pitcoudie or Markinch. In addition, there are a number of private nursery providers in this geographical area. Most pupils from the catchment areas of Milton of Balgonie and Coaltown of Balgonie have chosen to attend Carleton nursery.

- 5.2.18 Coaltown of Balgonie Primary School does not operate a morning or after school childcare service. The nearest childcare club is run from Carleton Primary School, which is situated 2.4 miles from Milton of Balgonie Primary School and 1 mile from Coaltown of Balgonie Primary School. The school currently has Stephen's foundation providing a breakfast provision for all pupils between 9.00 and 9.30 am each day. There is discussion with the Community Council to provide an alternative breakfast opportunity in the Decimal Hall.
- 5.2.19 Coaltown of Balgonie Primary School does have its own separate dining/ assembly hall located a short walk from the main school. However, on occasions such as school performances or a Christmas Fayre, the school has used the Victoria Hall on Rosebine Gardens, which is situated 320 metres away from the school. This building is less than a 10-minute walk from the school and classes are accompanied by the correct ratio of adults to pupils to ensure pupil safety.
- 5.2.20 The school has access to the public park which is located approximately 60 metres from the Coaltown of Balgonie Primary School playground.
- 5.2.21 The proposed new catchment area for Coaltown of Balgonie Primary School, from 28 June 2024, is shown within Appendix 4.
- 5.2.22 Coaltown of Balgonie Primary School was visited by a team of inspectors from Education Scotland in September 2022. A report was published on 22nd November 2022, providing an evaluation of the quality indicators for both Learning, teaching and assessment and Raising attainment and achievement as very good, following the gathering of evidence.
- 5.2.23 The inspection team found the following strengths in the school's work:
- The school is a warm and caring community. The learning needs of all children are identified clearly and well met. Staff work well with children and parents to plan learning, set targets for children and evaluate their success. Staff and children make good use of digital approaches to support learning. Partners and parents are well involved in supporting children's learning. Children enjoy learning at Coaltown of Balgonie and are proud of their school.
 - The school is very successful in achieving positive outcomes for children. Attainment is high in key areas such as literacy and numeracy. Children make good progress in their learning across the school. The achievements of all children are encouraged, supported and celebrated throughout the work of the school.
 - Staff work well together very well as a team. They support each other to learn and develop professionally. As a result, they focus their work on effectively meeting the needs of children as best as they can. Staff ensure that all children are well supported to achieve to the best of their abilities.
 - The following areas of improvement were identified and discussed with the Headteacher and a representative from Fife Council:
 - As planned, staff should continue to develop the extensive grounds to more fully extend outdoor learning and explore how best to track the skills children develop across their learning. This will help them ensure that children build on their prior learning and skills.

- Staff should continue to develop regular opportunities to work with others to ensure a clear, agreed understanding of standards.

5.2.24 Whilst the roll projections for Coaltown of Balgonie Primary School, highlight that the school roll is projected to exceed the current published capacity of 4 classes, the multi-purpose room and the one classroom extension planned would provide the required accommodation to manage pupil numbers. The Education Service is confident that the collaboration between the Planning Service and the Education Service, to analyse and respond to planning applications, is robust. School capacity risks are reviewed whenever the Housing Land Audit is renewed and when every new planning application is received and the roll projections reflect current pupil numbers, school capacity, class organisation and other relevant legislation and policies. These assessments are, and will continue to be, based on school data that is updated annually e.g. Pupil Census, School Estate Core Facts, and Housing Land Audit.

5.3 Pitteuchar East Primary School

5.3.1 The projected school roll at Pitteuchar East Primary School, at census 2022, was 249 pupils, with a maximum pupil capacity of 367 pupils (13 classes). There are currently approximately 2283 residential homes in the Pitteuchar East Primary School catchment area.

5.3.2 Without the new development in the Pitteuchar East Primary School catchment area, the school roll, as shown below (based on the 2022 census), would decline over a 10-year period to 57%, which is lower than the 60% guiding principle, detailed in para 3.1.

Year	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Roll	237	226	235	243	233	233	220	225	221	215	210	210
Capacity	367	367	367	367	367	367	367	367	367	367	367	367
Classes	9	9	9	10	9	9	9	9	9	8	8	8

5.3.3 The projected roll (based on the 2022 census) of Pitteuchar East Primary School can accommodate the projected new pupils from the following developments at:

GLE102 Westwood Park (420 units)
GLE167 Viewfield (48 units)

which has been modelled below as follows:

Year	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Roll	237	235	247	265	262	265	261	267	266	260	262	265
Capacity	367	367	367	367	367	367	367	367	367	367	367	367
Classes	9	9	9	10	10	10	10	10	10	10	10	10

5.3.4 The school roll projection, as shown above, demonstrates the housing development at Westwood Park can be accommodated within Pitteuchar East Primary School and will help sustain the pupil roll of Pitteuchar East Primary School in the long term. Planning consent has been granted and construction is under way. The occupancy of the school at census 2022 was 68% and with any new pupils, the school roll is not expected to exceed 75% occupancy for the 20-year period of school roll projections.

5.3.5 Pitteuchar East Primary School does have an out of school club (afternoon only) to support childcare for parents/carers in this catchment area.

5.3.6 The Headteacher of Pitteuchar East manages the nursery annex which is located approximately 2 minutes' walk from the main school building. This nursery

accommodates up to 122 pupils (4- and 5-year-olds) on a term time model (9am-3pm, 39 weeks per year) and has a nursery room to accommodate 2-year-old pupils. The nursery is not expected to be at capacity for session 2023/24.

5.3.7 As illustrated in Appendix 5, it is proposed that the partial site of GLE102 Westwood Park, that is currently within the Coaltown of Balgonie Primary School catchment area, be rezoned to Pitteuchar East Primary School. This will mean that all new pupils from this development site will be zoned to the same primary school.

5.3.8 The proposed new catchment area for Pitteuchar East Primary School, from 28 June 2024, is shown within Appendix 5.

5.4 Thornton Primary School

5.4.1 The school roll at Thornton Primary School, at census 2022, was 158 pupils, with a maximum pupil capacity of 261 pupils (9 classes). The projected roll of Thornton Primary School can accommodate the projected number of pupils from the Lochtyview Way development, as well as the pupils projected from the following sites:

- GLE161 Thornton West 2 (300 of the 900 units of the SDA)
- GLE164 Middlefield Row (15 units)
- GLE155 Dormitory House (5 units)
- GLE163 South of Riverside (5 units)
- GLE150 Strathore Road (4 units)

Year	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Roll	153	157	152	168	191	210	221	241	232	220	210	197
Capacity	261	261	261	261	261	261	261	261	261	261	261	261
Classes	7	7	7	7	8	8	9	10	9	9	9	8

5.4.2 For August 2023, the projected numbers used above is based on the known enrolments declared by the Headteacher on the annual staffing return which shows pupils organised over 7 classes, rather than the 6 classes projected. Although there is one year where the projected school roll increases to 10 classes, due to the distribution of pupils across the different stages impacting on class organisation, the multi-purpose room could be used short term as a teaching space, should this be the case in year 2030.

5.4.3 There are currently 27 pupils from the Lochtyview area in our primary schools. 74% attend Coaltown of Balgonie and 26% attend other schools, including Thornton Primary School. The Education Service would not expect parents to move their children to Thornton Primary School unless parents wished to do so. As illustrated in Appendix 6, it is proposed that the housing within the Lochtyview development is rezoned, in full, from Coaltown of Balgonie Primary School to Thornton Primary School. This means that any new pupil that moves into this catchment area after 28 June 2024 would be zoned to Thornton Primary School.

5.4.4 There is a nursery on site within Thornton Primary School, located in a separate building in the playground. This nursery can accommodate 60 pupils within a full year model of 30 pupils in the morning and 30 pupils in the afternoon. The full year model is open during most of the school holiday periods (49 weeks). There are currently places in both sessions for any new nursery aged pupils.

5.4.5 A review of out of school childcare provision is considering delivering this provision within the existing accommodation at Thornton Primary School, to support parents/carers who require childcare before or after school.

- 5.4.6 The Lochtyview housing site has been established for several years and is expected, in the future, to result in very few new pupils. However, the likely numbers from this development will be able to be accommodated within Thornton Primary School.
- 5.4.7 A proposed new catchment area for Thornton Primary School, from 28 June 2024, is shown within Appendix 6.

6. Educational Benefits Statement

6.1 The Schools (Consultation) (Scotland) Act 2010 provides that where an education authority has formulated a relevant proposal in relation to any school, it must comply with the requirements of the Act before proceeding with the proposal. The education authority must prepare an educational benefits statement which includes:

- (a) the authority's assessment of the likely effects of a relevant proposal (if implemented) on:
 - (i) the pupils of any affected school,
 - (ii) any other users of the school's facilities,
 - (iii) any children who would (in the future but for implementation) be likely to become pupils of the school,
 - (iv) the pupils of any other schools in the authority's area,
- (b) the authority's assessment of any other likely effects of the proposal (if implemented),
- (c) an explanation of how the authority intends to minimise or avoid any adverse effects that may arise from the proposal (if implemented),
- (d) a description of the benefits which the authority believes will result from implementation of the proposal (with reference to the persons whom it believes will derive them).

6.2 The Authority's assessment of the likely effects of a relevant proposal (if implemented on:

6.2.1 The pupils of any affected school

6.2.2 Benefits for the pupils of Milton of Balgonie Primary School catchment area

6.2.3 In making this proposal, the Education and Children Service's Directorate believes that being part of a larger school will enable both the existing pupils living in the Coaltown of Balgonie Primary School catchment area, and those pupils from Milton of Balgonie catchment area attending Coaltown of Balgonie Primary School, to continue to benefit from an enhanced range of curricular experiences, providing more opportunities to become successful learners, confident individuals, effective contributors and responsible citizens.

6.2.4 An increased pupil population (less than 20 moving to more than 90) will enable Milton of Balgonie catchment pupils to be educated in classes organised in a narrower range of school years (e.g. P1 - P2 instead of P1 - P7). This allows for more targeted teacher planning, taking account of the 7 principles of Curriculum for Excellence design, ensuring learner's experience a coherent curriculum across all 4 contexts (opportunities for personal achievement, interdisciplinary learning, ethos and life of the school and Curriculum areas and subjects). It also provides more opportunities for children to collaborate during planned learning activities as well as the learning environment more closely reflecting the age and stage of the pupils learning within it.

6.2.5 Composite class organisation spanning 3 or fewer primary year groups provides greater opportunities for planned and focused collaborative and cooperative learning activities, supporting a more rigorous development and progression of pupils' skills and knowledge. Importantly, pupils will have opportunities to learn with and from their similar age peers.

They will have more opportunities to consolidate and extend their learning, articulate arguments, explore new ideas and find creative solutions to problems within groups of their peers.

- 6.2.6 Pupils from Milton of Balgonie village are thriving within Coaltown of Balgonie Primary School and the advantage for Milton of Balgonie catchment pupils is that they now have a bigger peer group at each primary stage. It is no longer the case where a single pupil from one primary stage is now playing with pupils from an older or younger year group, as previously there were no other pupils at the same age. This has reduced the risk of social isolation as a result of having no other peer group of same age. This has also reduced the lack of uncertainty with new pupils as Coaltown of Balgonie has 4 classes (for the past 13 years) which are organised in composite classes. When possible, there has always been a minimum of at least 4 pupils of each stage which provides greater peer support in each class setting.
- 6.2.7 Within the larger school, learners will have the opportunity to develop wider relationships and friendships which will see them better prepared to meet the social and learning opportunities and challenges ahead in the large context of secondary school. This is important in terms of developing their learner journey from 3 to 18 years of age.
- 6.2.8 Attending a larger school provides pupils from Milton of Balgonie with the opportunity to undertake a wider range of leadership and team roles during a wider variety of planned pupil experiences.
- 6.2.9 It is anticipated that the larger occupied school will provide more flexible support to children with additional support needs and will provide opportunities for these children to be supported by a range of adults over time. A greater pool of adults can help facilitate the development of children's independence and their capacity to interact with others.
- 6.2.10 A larger school roll at Coaltown of Balgonie Primary School offers children from the Milton of Balgonie Primary School catchment area an increased possibility of participating in teams in a range of local and national competitions and events. These educational, cultural, and sporting activities provide a number of benefits for children in terms of both academic and social development, whilst also supporting the process of transition towards the larger and more varied educational setting of secondary school.
- 6.2.11 Pupils currently transitioning from Nursery to Coaltown of Balgonie Primary School Primary 1 are more likely to have attended Nursery with a child who is also transitioning to the same primary school. This will provide peer familiarity and reassurance for pupils. Similarly, a greater number of children transitioning from P7 at Coaltown of Balgonie to Auchmuty High School will ensure similar benefits for young people.
- 6.2.12 There are 30 nursery aged pupils living in the Coaltown of Balgonie and Milton of Balgonie Primary School catchment areas attending Fife Council nurseries or partner providers. 14 of the 30 attend Carleton nursery, 11 attend other Fife Council nurseries and 5 attend partner providers.
- 6.2.13 It was previously exceptionally difficult to facilitate any after school activities at Milton of Balgonie, with a single teacher working within the school (in 3 of the last 10 years) as well as small numbers making some activities non-viable. Alongside a larger pool of teachers, partners offer a range of more viable opportunities for children in Coaltown of Balgonie, with activities taking place at lunchtime and after school.

6.3 **Benefits for the pupils of Coaltown of Balgonie Primary School**

- 6.3.1 The gradual move of children from Milton of Balgonie Primary School has resulted in no negative impact for pupils attending Coaltown of Balgonie Primary School from the Milton of Balgonie catchment area.

- 6.3.2 Coaltown of Balgonie Primary School pupils will have increased opportunities to develop relationships and friendships with peers from a wider geographical area. They will also have greater opportunities to participate in co-operative and shared learning experiences with more peers of a similar age.
- 6.3.3 An increased school roll supports the sustainability and viability of the school, offering greater certainty to learners within the Coaltown of Balgonie Primary School community. There will be a narrower age range of pupils in each composite class.
- 6.3.4 Pupils within Coaltown of Balgonie will continue to have access to any lunchtime and after school clubs on offer which are managed by school staff or Active Schools. The addition of pupils from Milton of Balgonie will provide an enhanced number of pupils to take part in teams organised by age.
- 6.3.5 There may be opportunities in future for pupils to get involved with any evening activities run by outside agencies. There is currently no demand for the school to be open in the evening for community events or activities, with the exception of school events such as Parent Council meetings.
- 6.3.6 As a result of an increased school roll, the overall staffing allocation would be reviewed.

6.4 Benefits for the pupils of Pitteuchar East Primary School

- 6.4.1 Re-zoning the Westwood Park area currently part zoned to Coaltown of Balgonie, will ensure that as the site is developed, pupils will be associated with an established school community that they are living in, being educated with peers living in close proximity.
- 6.4.2 Allocating all 420 units to the Pitteuchar East catchment area will sustain the school roll and ensure the projected occupancy remains above 60%.
- 6.4.3 Pupils attending Pitteuchar East Primary School have access to an after-school club operating at the close of the school day.
- 6.4.4 Pupils from the Westwood Park area will have increased opportunities to develop friendships with others from a wider geographical area.
- 6.4.5 As a result of an increased school roll, the overall staffing allocation would be reviewed.

6.5 Benefits for the pupils of Thornton Primary School

- 6.5.1 Pupils living at the housing development at Lochtyview will benefit from being able to walk to school with peers living in the local community.
- 6.5.2 Pupils currently living in the Lochtyview area are bused to Coaltown of Balgonie. While there is an available footpath on the B9130 (Blackwood Route), the route is longer than 1 mile to Coaltown of Balgonie Primary School. This road is 40 mph until the beginning of Main Street, Coaltown of Balgonie and the footpath on B9130 has the A92 underneath. The pupils will benefit by being able to develop their independence by walking using an available walk route. providing an opportunity to socialise with peers who live nearby before and after school.
- 6.5.3 Pupils from the Lochtyview area would more than likely be part of a single stream class based on the higher numbers of pupils at the same age, rather than a small number of pupils from a variety of stages within a composite class. For example, in session 2022/2023 at Thornton Primary School, there were 5 classes of straight primary classes and 2 composite classes. Therefore, pupils are more likely to have only 2 primary stages in their class at any one term of their education provision within Thornton Primary School.

6.5.4 As the nursery is located within Thornton Primary School, parents/carers have the opportunity of reducing their travel by walking both nursery and primary age children to school, where applicable.

6.5.5 As a result of an increased school roll, the overall staffing allocation would be reviewed.

6.6 **Effect on Staff as a result of the closure and rezoning proposal**

6.6.1 The number of pupils in Milton of Balgonie, for the last 2 academic sessions it was operational, resulted in a single class school. Operating as a single class for an academic session, results in limited opportunities for staff collaboration. As a result of an increased pupil roll at Coaltown of Balgonie Primary School there will be a larger staff team who will have opportunities to work in collaboration with additional peers for a variety of different purposes. These opportunities include self-evaluation for self-improvement activities, developing and implementing school improvement priorities, as well as assessment and moderation activities to ensure consistent standards and expectations for all pupils.

6.6.2 At Coaltown of Balgonie Primary School, there will be a greater number of staff than previously located within Milton of Balgonie Primary School. This will result in an increased range of staff specialism, knowledge, expertise, skills and talent as well as increased scope in the deployment of staff to meet the needs and respond to the differing interests and curricular choices of individuals.

6.6.3 Increased opportunities for collaborative working between a larger number of teachers and pupil support staff will provide a wider range of learning and teaching approaches, develop a consistency of expectations and opportunities to share good practice, leading to better outcomes for children. Furthermore, collective professional learning activity will offer increased opportunities for moderation and curriculum development which will directly impact on school improvement. This will support the national and Fife-wide empowerment agenda.

6.6.4 The larger occupied school will provide a progressive and coherent curriculum, based on an enhanced range of planned learning and teaching approaches, which will have a potential positive impact on the quality of pupils' wider achievements. More teachers and more Pupil Support Assistants will help ensure high quality staff interaction through joint planning and shared career-long professional learning opportunities.

6.6.5 This rezoning proposal is expected to sustain the existing school roll at both Pitteuchar East and Thornton Primary Schools. As a result, the number of staff required in both schools is expected to remain the same level supporting constituency across all aspects of school life.

6.7 **Effect on Facilities as a result of the closure and rezoning proposal**

6.7.1 Milton of Balgonie Primary school comprises 3 classrooms smaller than the 57 sqm standard size. The school hall is considerably smaller than the size recommended by Sport Scotland.

6.7.2 Pupils who previously attended Milton of Balgonie Primary school will benefit from the enhanced facilities available at Coaltown of Balgonie Primary School. This will provide staff with greater flexibility of opportunities to use different types of learning environments that better support a range of learning activities and opportunities for all learners.

6.7.3 Outdoor physical education facilities at Coaltown of Balgonie can deliver the recommended 2 hours of physical education per week, to all pupils, throughout the year. This is crucial to the physical and emotional wellbeing of the children. The school has a

larger dining hall which can also accommodate different types of physical activity. The local park is a 2-minute walk from the school and provides plenty of outdoor space. The available greenspace at Milton was located 290 metres away from the school on Dickson Lane. A greater adult to pupil ratio would be required to take pupils to this greenspace for physical activity.

6.7.4 It is not expected that this proposal will have any significant impact on the facilities of Pitteuchar East or Thornton Primary Schools. Both of these schools have a variety of learning spaces to allow all pupils to receive the full breadth of the curriculum and meet learners needs.

6.8 **Effect on Parents as a result of the closure and rezoning proposal**

6.8.1 In the session 2018/19, Milton of Balgonie Primary School did have a Parent Council comprising of parents from the Primary 7 cohort which looked unlikely to continue after the P7 pupils transferred to secondary school.

6.8.2 The increased number of pupils attending Coaltown of Balgonie Primary School provides all parents from the Milton of Balgonie catchment area the opportunity to be part of a larger parent forum of the school and wider geographical community area.

6.8.3 An active Parent Council at Coaltown of Balgonie gives the opportunity for parents from Milton of Balgonie catchment area to become a member of a supportive group which has regular meetings and fundraising events. All parents of Coaltown of Balgonie and Milton of Balgonie pupils are invited to join every meeting.

6.8.4 Parents from the Milton of Balgonie catchment area will be able to attend a wider range of events on offer at Coaltown of Balgonie, as a result of the enhanced curricular opportunities made available to pupils during and beyond the school day. The benefits of parental involvement in their children's education are clearly recognised and any increase in parental involvement has the potential to directly benefit children in their learning.

6.8.5 For parents of pupils currently living in the new housing at Westwood Park that is zoned to Coaltown of Balgonie Primary School, this will result in the entire site being zoned to one primary school catchment area. Parents of this new housing development will all be included in the community of Pitteuchar East Primary School and have the opportunity to be involved in the life of the school including their Parent Council.

6.8.6 For parents of pupils currently living in the Lochtyview area, this will allow them to be involved in the school within the community that they live. This would also allow parents an opportunity to walk their child to school and connect with families on route.

6.9 **Effect on the Community as a result of the closure and rezoning proposal**

6.9.1 Due to the number of community facilities in Milton of Balgonie, pupils had limited opportunities to be active members of the immediate school community. However, this contrasts with the experience available in Coaltown of Balgonie Primary School, where pupils are an integral part of the community. Litter picks in the community, links with the Milton and Coaltown Community Council, links with the bowling club and football club continue. The local shops and businesses at the retail park continue to support the school.

6.9.2 Pupils from Milton of Balgonie catchment area will also benefit from links with the local convenience store, which has supported Coaltown of Balgonie Primary School through their generous donations for sports days and donations for McMillan coffee mornings. Pupils will also benefit from partnerships with businesses located at the local retail area at Bankhead roundabout. These include excellent links with McDonalds who provide opportunities to enhance pupil's learning experiences.

6.10 **(ii) Benefits for any other users of the school's facilities**

6.10.1 Milton of Balgonie Primary School has not been used by the community in the last 3 academic sessions prior to mothballing. The nearby village hall is available for wider community use. Should this proposal be implemented, any new community activities could be staged in the nearby village hall which is less than 275 metres from the existing school building.

6.10.2 This proposal seeks to sustain 3 school communities long term and resolve the existing catchment anomalies. This proposal will ensure the school estate is managed long term as the current information will future proof the provision required in these catchment areas. The proposal will meet the guiding principles around occupancy and enables communities to be brought together with housing situated in close proximity.

6.10.3 For those pupils attending Coaltown of Balgonie, Pitteuchar East or Thornton Primary Schools, the schools may deliver community events in the evenings and there would not be any negative effect on any community activity continuing as a result of this proposal.

6.11 **(iii) Benefits for any children who would (in the future but for implementation) be likely to become pupils of the school**

6.11.1 The closure of Milton of Balgonie Primary School from 19 August 2024 will alleviate uncertainties for current and future pupils and their families and will provide long term stability.

6.11.2 The rezoning of Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools will ensure that housing is associated with primary schools in a geographical location and ensure long term stability for these communities.

6.11.3 At Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools all pupils and parents will benefit from a sustained school roll which will support continuity in school leadership team allocations, along with support for learning and admin support. These positions are allocated to schools based on the size of the school roll.

6.12 **(iv) Benefits for the pupils of any other schools in the authority's area**

6.12.1 The formal closure of Milton of Balgonie Primary School would reduce inefficient operating expenditure, thus allowing redirection of resources to support pupils across Fife. The more efficient use of resources will result in a more equitable and "best value" model for deployment of resources across Fife schools. This has implications for the school estate, resources and staffing, all of which are considered to impact positively on children's learning. The financial operating costs of Coaltown of Balgonie have not increased from the time of Milton of Balgonie Primary School being mothballed.

6.12.2 The school catchment reviews at Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools will benefit other pupils in the local authority because those living in the same communities as them will be able to attend school alongside them, strengthening peer relationships both in and out of school.

- 6.12.3 As outlined in Appendix 10, the long term a transport saving will be achieved as the transport costs of £59,622 for pupils travelling from Lochtyview to Coaltown of Balgonie Primary School will be offset against the costs to transport for pupils from the Milton of Balgonie Primary School catchment area to Coaltown of Balgonie Primary School. This ensures that revenue funding can be directed towards learning and teaching.
- 6.13 **The authority's assessment of any other likely effects of the proposal (if implemented)**
- 6.13.1 As all the Milton of Balgonie Primary School catchment area pupils live more than 1 mile from Coaltown of Balgonie Primary School, free transport will continue to be provided for all, in line with current Fife Council policy.
- 6.13.2 If the proposed changes to the catchment areas are implemented, any pupil who remains at their enrolled school for the duration of their primary school that currently receives transport to school, this would continue until they leave this education setting.
- 6.14 **How the Authority intends to minimise or avoid any adverse effects that may arise from the proposal (if implemented)**
- 6.14.1 Milton of Balgonie Primary School catchment pupils are well established within the Coaltown of Balgonie Primary School community, following successful transition prior to mothballing. Comprehensive transition arrangements continue to be in place at Coaltown of Balgonie to welcome children from a variety of nursery settings.
- 6.14.2 The school catchment reviews at Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools may result in siblings attending different schools, however, every effort will be made to support families to attend the same school. Where necessary, families will be supported to move to their new catchment school with enhanced transition arrangements in place to minimise impact.
- 6.14.3 Priority will be given to ensuring continuity and support for children with additional support needs.
- 6.15 **Description of the benefits which the authority believes will result from implementation of the proposal (with reference to the persons whom it believes will derive them).**
- 6.15.1 The education of current and future pupils from Milton of Balgonie village and the surrounding area will take place in a larger setting which will facilitate delivery of improved educational opportunities in a more sustainable context. Broadly, the Council believes the larger setting of Coaltown of Balgonie Primary School provides an increased range of opportunities to deliver Curriculum for Excellence for existing Coaltown of Balgonie pupils and to enable any new and future Milton of Balgonie catchment pupils to benefit from an educational setting organised to meet their identified needs.
- 6.15.2 The expenditure currently required to maintain Milton of Balgonie Primary School will be redirected to the benefit of all learners in schools across Fife. This redirection can positively impact directly on staffing, resourcing and school estate management, and enhance educational opportunities for a larger group of children and young people. Taking account of the financial constraints which apply to all local authorities currently, and in the foreseeable future, this intention is consistent with prudent and efficient management of public funds.

6.16 **Benefits the Authority believes will result from implementation of the proposal**

- 6.16.1 This proposal will ensure better alignment of communities and catchment areas to enable housing building to progress and neighbourhoods and communities to be enhanced.
- 6.16.2 This proposal will ensure a best value approach to the management of the school estate, as capacity exists in Pitteuchar East and Thornton Primary School to manage potential increased pupil rolls as a result of new housing developments.
- 6.16.3 This proposal will utilise capacity available within Pitteuchar East and Thornton Primary Schools, ensuring the occupancy of both schools remains over 60%.
- 6.16.4 For a number of pupils, this proposal will ensure that pupils could walk to their catchment school, building relationships, resilience and independence for our young people.

7. **Transport Arrangements**

- 7.1 Included in this proposal paper is the opportunity to rezone part of the Coaltown of Balgonie Primary School catchment area to Thornton and part of the Coaltown of Balgonie Primary School catchment area to Pitteuchar East. The rezoning of these parts will ensure that the catchment areas are balanced and will ensure that pupils are not situated on the opposite side of the A92 from their catchment area primary school.
- 7.2 A pupil is legally entitled to free transport to school if:
- they're under 8 and live more than 2 miles from their catchment school or
 - they're over 8 and live more than 3 miles from their catchment school
- 7.3 However, in terms of the current school transport policy, Fife Council currently provides free school transport to all primary pupils living more than one mile and all secondary pupils living more than two miles from their catchment area school. Any distance entitled pupils will be entitled to free school transport according to the policy in place at that time.
- 7.4 Where there are spare seats on existing school buses or suitable commercial bus services, pupils can pay a fare or use their NEC card (with the travel entitlement loaded) to travel free. The availability of school transport for pupils attending a school as a placing request is not guaranteed and if an offer of a place is accepted, parents would be responsible for getting their child to and from school.
- 7.5 Milton of Balgonie Primary School Catchment Pupils
- 7.5.1 There is no available walking route from Milton of Balgonie village to Coaltown of Balgonie Village.
- 7.5.2 For the last academic session (2022/23), all pupils living in the Milton of Balgonie Primary School catchment area who were attending Coaltown of Balgonie Primary School were offered free transport. This applied to the new pupils who commenced Primary 1 in August 2022 and those pupils who previously attended Coaltown of Balgonie Primary School following their placing request applications (prior to academic session 2019/20).
- 7.5.3 Whilst Milton of Balgonie Primary School was in operation, there was no school transport provided for academic sessions 2016/17, 2017/18 and 2018/19 as none of the pupils qualified for free transport in accordance with the transport policy. Several previously enrolled pupils within Milton of Balgonie Primary School were placing requests to Milton of Balgonie Primary school and were not entitled to transport.

- 7.5.4 Should the proposal to close Milton of Balgonie Primary School be implemented, free transport will continue to be provided for pupils living in the Milton of Balgonie Primary School catchment area who are living more than 1 mile from Coaltown of Balgonie Primary School, in line with current Council policy.
- 7.5.5 The current arrangement has resulted in pupils being pick-up in close proximity to their homes. Pupils are then dropped off in the car park situated 50 metres from the school. Pupils at the end of the day are escorted to the taxi or minibus.
- 7.6 Coaltown of Balgonie Primary School Catchment Pupils
- 7.6.1 In relation to the proposal to rezone the Lochtyview Way part of the Coaltown of Balgonie Primary School catchment area, this area is currently provided with free transport to Coaltown of Balgonie. Should the proposal be implemented, transport will be provided for existing pupils who continue to attend Coaltown of Balgonie Primary School.
- 7.7 Pitteuchar East Primary School Catchment Pupils
- 7.7.1 There are pupils within the existing Pitteuchar East Primary School catchment area who are entitled to receive free transport as they are living more than one mile away from the school. Following the completion of new housing units within the Westwood Park area, when footpath infrastructure is in place, a walking route assessment will be carried out to assess available walking routes. Should the proposal be implemented, free transport will be provided for any pupil in accordance with the current policy.
- 7.8 Thornton Primary School Catchment Pupils
- 7.8.1 A walking route assessment will be carried out to establish any available walking route from the Lochtyview area to Thornton Primary School. Should the proposal be implemented, and the area of Lochtyview is rezoned from Coaltown of Balgonie Primary School, most pupils from this area will be able to walk to Thornton Primary School as the distance is less than one mile. Should the proposal be implemented, free transport will be provided for any pupil in accordance with the current policy.
- 8. Nursery Provision**
- 8.1 The closure of Milton of Balgonie Primary School, the transferring of the catchment to Coaltown of Balgonie, the catchment rezoning of Pitteuchar East and the catchment rezoning Thornton Primary Schools have no impact on nursery provision available.
- 8.2 In addition to the nursery settings managed by the Education Service, there are a number of private nursery providers/childminders in this geographical area. These nurseries will offer a variety of operational models to enable parents/carers to select their choices for nursery provision to suit their own individual family circumstances.
- 8.3 There is sufficient capacity across the wider local nursery area to accommodate all the nursery aged pupils from the Milton of Balgonie Primary School catchment area.
- 9. Secondary School Implications**
- 9.1 In terms of the School Admissions Policy for Primary and Secondary Schools in Fife, enrolment at a secondary school is based on the catchment area in which a pupil's home address is situated. No changes to secondary school catchments are being proposed as part of this consultation.

- 9.2 The policy also provides that standard enrolment for transfer from primary to secondary are organised annually between the secondary school and its associated primary schools.
- 9.3 Milton of Balgonie Primary School, Coaltown of Balgonie Primary School, Pitteuchar East and Thornton Primary Schools are all associated primary schools for Auchmuty High School.
- 9.4 The denominational schools associated with these primary schools are St Paul's Roman Catholic Primary School in Glenrothes and St Andrew's Roman Catholic High School in Kirkcaldy. As indicated in para 1.5, there are no proposed changes to the denominational primary and secondary catchment areas associated within the proposal.
- 9.5 Parents have the right to request that their child attend a school other than their designated catchment school (or to their designated catchment school if the child has not been offered a place there). Any such request is called a placing request and is governed by the Education (Scotland) Act 1980. In most circumstances placing requests will be granted where pupil places are available, but the pupil will not be entitled to free or subsidised school transport. Further information on placing requests and the procedure involved can be found in the School Admissions Policy for Primary and Secondary Schools in Fife which can be found at [Apply for a school place | Fife Council](#).

10. Cost per Pupil Calculation

- 10.1 The cost per pupil equates to the total expenditure for all running costs associated with a primary or secondary school, divided by the number of pupils enrolled in the school at the September census.
- 10.2 The cost per pupil for the schools was as follows:

	Financial Year 2018/19	Financial Year 2021/22	Financial Year 2022/23
Milton of Balgonie PS	£7,302 *	-	-
Coaltown of Balgonie PS	£4,767	£5,005 **	£5,349
Pitteuchar East PS	£3,616	£4,689 **	£5,072
Thornton PS	£3,840	£5,066 **	£5,248

* based on the budgets from 2019-2020 and excludes any Pupil Equity Funding (PEF).

** which excludes any Pupil Equity Fund (PEF) and additional teachers funding as part of any Scottish Government initiative to increase teacher posts through the COVID-19 pandemic.

11. Financial Implications

- 11.1 No savings has been realised as no budgetary savings have been taken. The budget associated with Milton of Balgonie Primary School has become part of the overall primary budget. Some savings have been realised as a result of the mothballing of Milton of Balgonie Primary School. If Milton of Balgonie Primary School were to close on 19 August 2024, and the building is disposed of, a detailed financial breakdown of the savings proposals, including transport, is contained within Appendix 10.
- 11.2 There have been increased travel costs to Coaltown of Balgonie for Milton of Balgonie pupils, amounting to £5,700. These costs can be offset against the £59,622 that may be saved in the long term from transporting pupils from the Lochtyview area to Coaltown of Balgonie Primary School.

11.3 If it was determined that the school should reopen, approximately £105,000 would be required to staff the school, and in addition, costs to fully equip the school with ICT, furniture and resources, to meet the needs of learners. It will be necessary to redecorate the school, provide new floor coverings and provide enhancement to the dining facilities. This could equate to approximately £70,000.

12. Grant Aided Expenditure (GAE)

12.1 Milton of Balgonie is currently mothballed and the proposed closure of the school will have no impact on GAE allocations. GAE allocations are determined by school roll numbers and the school currently has no pupils. Any decrease in the number of pupils in rural schools does not necessarily result in a decrease in total GAE flowing to Fife. Any decrease is calculated relative to the movement over the other 31 authorities. GAE figures do not represent budgets, targets or expenditure guidelines but are simply a distribution method of determining each local authority's share of total revenue budget funding based on relative need. The GAE process is complex and the implications of one school closure cannot be calculated based on the overall allocation of GAE.

13. Future Use of the Site

13.1 Milton of Balgonie Primary School is situated on Main Street, Milton of Balgonie. The school is currently maintained by our Property Services Team and Orbis to ensure it is wind and watertight and is regularly checked by Janitorial Services. The school resources were removed in November 2021 to ensure compliance with Fife Council's insurance.

13.2 If the closure proposal is approved by the Cabinet Committee, consideration will be given to other educational uses for the site. If none can be identified other uses by the Council will be considered. If no alternative uses can be identified in this way the site will be disposed of.

13.3 No decision can be made on the future use of the site unless the closure proposal is approved by the Cabinet Committee, but there are potential educational uses for the site that could be explored at that stage.

14. Community Impact of the Closure

14.1 In preparing this proposal the Council has considered then ways in which the closure of Milton of Balgonie Primary School might impact on the community, taking account of research published by the Scottish Government in 2012 (Robinson and Whittaker, EAS Learning Research). This research identifies a number of key areas for consideration.

14.2 On the basis of this proposal all children from the Milton of Balgonie community would be educated within Coaltown of Balgonie Primary School. Coaltown of Balgonie Primary School already has a small number of Milton of Balgonie Primary School catchment area pupils enrolled, following successful placing requests. As no pupils are currently enrolled at Milton of Balgonie Primary School, in practical terms, no pupils will require to transfer to Coaltown of Balgonie Primary School, upon closure of the school.

14.3 Loss of social resource and community resource

Milton of Balgonie Primary School has not been used by other community users during the last 3 academic sessions (2018/19, 2019/20 and 2021/22 or 2022/23). The community of Milton of Balgonie has access to a Community Centre, managed by Fife Council's Community Services less than 500 metres from the existing school building. The committee of the village hall issue a regular newsletter on clubs/activities that use the hall and they have a current Facebook page. Closure of the school would have no impact on this aspect of village life.

14.4 **Economic impact**

Milton of Balgonie Primary School is not a major employer within the community and in this respect the closure of the school will not have any significant economic impact. In addition, there are currently no large retail or service facilities located within Milton of Balgonie village whose continued viability might be dependent on the school. From a google maps search it appears there is a Gift Shop and Kilt Hire shop listed as local businesses and a number of self-employed businesses that operate from residential addresses. The pub/restaurant is currently closed and on the open market for sale. More retail and service facilities are located in Coaltown of Balgonie (1.7 miles) and within Glenrothes at the Bankhead Roundabout (petrol station, McDonalds, nearby restaurants 3.8 miles) and in the Carleton Primary School area a selection of local shops (hairdresser, pub, post office and food shop/takeaways - 3.1 miles). There is no evidence to suggest that the proposed school closure will have any impact on the desirability of houses for purchase or let, and comparable Fife communities without schools continue to flourish.

14.5 **Community and parental involvement**

The education of children at Coaltown of Balgonie Primary School has not impacted on parents' desire to be involved in their children's education.

14.6 **Impact on pupils**

During academic session 2018/19, the Headteacher started to increase the educational and social links between Milton of Balgonie and Coaltown of Balgonie Primary Schools and this continues with the current headteacher and pupils/parents/carers. Currently, all children within Coaltown of Balgonie are benefitting from having access to larger peer groups, increased friendships and the increased social opportunities which this offers, such as Christmas Fayres and movie nights.

14.7 **Attitudes to school closure**

Prior to the decision to mothball Milton of Balgonie Primary School, all parents/carers of those pupils from the Milton of Balgonie Primary School catchment area attending Coaltown of Balgonie Primary School or any other primary school in Fife were invited to provide feedback on the Council's proposal to mothball the school. However, to date there has been no formal feedback from parents to suggest any concern with mothballing Milton of Balgonie Primary School. It is unfortunate that the school roll has declined in previous years, but in practical terms, parents understand the decisions that have been made.

14.8 **Loss of close relationship between headteachers/teachers and the local community**

In August 2019, there were no pupils enrolled in Milton of Balgonie Primary School. In the previous session, staff at Milton of Balgonie Primary School had established good communication and strong links with parents/carers from the Milton of Balgonie school community. To support the transition to Coaltown of Balgonie Primary School in August 2019, the Pupil Support Assistant transferred from Milton of Balgonie Primary School to Coaltown of Balgonie Primary School. This member of staff was able to maintain the link with pupils which provided continuity for the pupil being supported, as well other former pupils from Milton of Balgonie Primary School. In session 2018/19, the Headteacher at Coaltown of Balgonie was also the Headteacher for Milton of Balgonie, providing continuity of leadership for the transition of pupils. There was also a class teacher who worked in Milton of Balgonie Primary School covering non-class contact time who became a Principal Teacher within Coaltown of Balgonie Primary School. Arrangements have been in place to ensure that these links are maintained with parents/carers, and it is anticipated that there will be no impact on such relationships.

- 14.9 **Pupils' sense of community identity**
The current participation of children in activities in the wider community would indicate that this does not represent an area of significant impact. Links were already being established in 2019/20. The staff within Coaltown of Balgonie Primary School do not make any pupils feel any different and all pupils are part of the same school community. Milton of Balgonie pupils have integrated into the school community and the school continues to reinforce links back to community groups to ensure all pupils from Coaltown of Balgonie Primary School are included.
- 14.10 **Loss of community confidence and a general decline in quality of life**
The potential impact of the closure of the school in terms of community confidence and quality of life, while limited, is recognised. However, there is a Community Council in operation for the Milton and Coaltown of Balgonie settlements and this should continue to maintain the community aspect for both small villages
- 14.11 In summary, if the proposal is implemented the Council does not consider that there will be any adverse effect on the local community, whether defined as the school community, the village community or the wider rural community surrounding the village of Milton of Balgonie. Overall, the Council considers that there will be a positive effect on the local community. The Council considers that any adverse impact is unlikely to be significant, but where identified, this will be addressed through a range of measures.

15. **Summary of Proposal**

- 15.1 The proposal is to:
- (a) Close Milton of Balgonie Primary School on Monday 19 August 2024.
 - (b) Rezone the catchment area of Coaltown of Balgonie Primary School to incorporate all the current catchment area of Milton of Balgonie Primary School from Monday 19 August 2024
 - (c) Seek alternative uses for the Milton of Balgonie Primary School site.
 - (d) Rezone the catchment areas of Pitteuchar East and Thornton Primary Schools, to realign these primary school catchments from 28 June 2024.
- 15.2 The school roll of Milton of Balgonie Primary School was 0 pupils for academic session 2019/20, 2020/21, 2021/22 and 2022/23 and with a maximum pupil capacity of 75 this represents 0% occupancy. There were no requests for primary one enrolment for session 2022/23 or 2023/24, representing an occupancy level of 0%. The school does not meet the guiding principles of being more than 60% occupied, having more than 50 pupils or 3 classes or more. The school roll is unlikely to increase with the current demographic profile of the catchment area and there are no housing sites with approved planning consent within the school catchment area, which will support a declining school roll, expected to start in the near future. The school was formally mothballed, following the decision by the Education & Children's Services Sub-Committee on 26 January 2021, with no formal feedback being received from parents in the Milton of Balgonie catchment area to request that the school remains open.
- 15.3 **Having identified the reasons for this proposal and considered whether there are any reasonable alternatives to the proposal, as a response to those reasons, the Council considers closure would be the most appropriate response to those reasons.**

15.4 The reasons for formulating this proposal:

The Schools (Consultation) Scotland Act 2010 states that education authorities must identify the reasons for formulating a proposal to close a rural school. This proposal was formulated for the following reasons:

- a) Milton of Balgonie Primary School has had no pupils enrolled for academic sessions 2019/20, 2020/21, 2021/22 and 2022/23.
- b) Milton of Balgonie Primary School has been mothballed since January 2021. The school building is currently being maintained by Property Services to ensure it is wind and watertight.
- c) There has been no attempt by parents living in the Milton of Balgonie Primary School catchment area to seek to enrol pupils in Milton of Balgonie Primary School since August 2019.
- d) Updated birth information has shown that the births in the catchment area have not significantly increased in the last year and there is no other anticipated increased growth in pupil population in the catchment area from, for example, large scale housing development of over 100 units.
- e) Milton of Balgonie Primary School meets two of the Fife Council guiding principles as outlined in para. 3.1.
- f) The pupil roll for session 2023/2024 is 0. The one pupil living in the Milton of Balgonie Primary School has not enrolled at Coaltown of Balgonie Primary School and was granted a place at an alternative primary school.

15.5 Coaltown of Balgonie, Pitteuchar East and Thornton Primary Schools are not classified as rural schools in accordance with the Scottish Government Rural Schools Classification dated October 2021.

15.6 Pupils from the Milton of Balgonie Primary School catchment area can be accommodated within the existing accommodation at Coaltown of Balgonie Primary School, however, these projected pupil numbers include all pupils currently within the Coaltown of Balgonie and Milton of Balgonie catchment areas, while the full proposal includes the option to realign the primary school catchment of Thornton Primary School. This option will remove some addresses from the Coaltown of Balgonie projected numbers, allowing the occupancy of this school to remain below the published capacity of 100. This will provide continued flexibility in the use of the accommodation.

15.7 The Education Service acknowledge that the school roll projections shown in para. 5.2.12 indicate that Coaltown of Balgonie Primary School will increase to 6 or 7 classes. At present 2 of the 3 sites have not yet received planning consent and therefore the phasing of development differs to that included in school roll projections. The school roll projections will also change if the pupil product is not manifested across this area. The extension to Coaltown of Balgonie Primary School is as a direct result of the 2 housing sites within the Coaltown of Balgonie Primary School catchment area, and an additional 44 units over the local plan threshold. Regardless of the outcome of the consultation, an extension would be required to Coaltown of Balgonie Primary School.

15.8 The school roll at Pitteuchar East Primary School, at census 2022, was 249 pupils, with a maximum pupil capacity of 367 pupils (13 classes). Without the new development in the Pitteuchar East Primary School catchment area, the school roll would decline over a 10-year period to 57%, which is lower than the 60% guiding principle. The latest school roll projection demonstrates the housing development at Westwood Park for 420 units can be accommodated within Pitteuchar East Primary School and this will help sustain the school roll in the long term. Therefore, it is proposed that the partial site of GLE102 Westwood Park, that is currently within the Coaltown of Balgonie Primary School catchment area, will be rezoned to Pitteuchar East Primary School from 28 June 2024. This will mean that all new pupils from this development site will be zoned to the same school.

15.9 The school roll at Thornton Primary School, at census 2022, was 158 pupils, with a maximum pupil capacity of 261 pupils (9 classes). The projected roll of Thornton Primary School can accommodate the projected number of pupils from the Lochtyview Way development, as well as the pupils projected from 300 of the 900 units of the Strategic Development Area (SDA) development for Thornton and the other small housing developments. Therefore, it is proposed that the housing within the Lochtyview development is rezoned, in full, from Coaltown of Balgonie to Thornton Primary School. This means that all new pupils from this development site from 28 June 2024 will be zoned to this school.

16 Proposed Date for Implementation

16.1 It is intended that the proposal, if approved by the Cabinet Committee of Fife Council, would be implemented on Monday 19 August 2024 for pupils from Coaltown of Balgonie and Milton of Balgonie. The catchment area changes for Pitteuchar and Thornton Primary Schools would be implemented from 28 June 2024. Nursery aged pupils transferring to Primary 1 in August 2024 would enrol in their existing primary school in January 2024. If the proposal is approved in full, all catchment areas would be implemented in time for the new session starting Wednesday 21 August 2024 for all enrolments, including placing requests, from this date.

17 Statutory Consultation Process – Proposed Timeline

Thursday 11 January 2024	Consultation proposal considered by Fife Council 's Cabinet Committee
Tuesday 23 January 2024	Parents and other statutory consultees issued with Consultation Notice informing them of relevant dates and information about the statutory consultation
Wednesday 24 January 2024 – Tuesday 12 March 2024	Consultation live
Wednesday 14 – Friday 16 February 2024	School INSET and School holidays
	<p>Public meetings held on:</p> <ul style="list-style-type: none"> • Village Hall, Dickson Lane, Milton of Balgonie on Monday 5 February 2024 from 6-7 pm • Thornton Primary School on Monday 12 February 2024 from 6-7 pm • Pitteuchar East Primary School on Wednesday 28 February 2024 from 6-7 pm <p>Drop-in sessions at:</p> <ul style="list-style-type: none"> • Pitteuchar East Primary School on Tuesday 30 January 2024 from 8.45-9.30 am • Coaltown of Balgonie Primary School on Tuesday 6 February 2024 from 2.30-3.30 pm • Village Hall, Dickson Lane, Milton of Balgonie on Monday 5 February 2024 from 5-6 pm • Thornton Primary School on Monday 12 February 2024 from 8.45-9.30am • Thornton Primary School on Monday 12 February 2024 from 5-6 pm • Pitteuchar East Primary School on Wednesday 28 February from 5-6 pm

Tuesday 12 March 2024	Consultation Close
Friday 15 March 2024	Report on consultation process is submitted to Education Scotland
Monday 18 March 2024 – Friday 19 April 2024	Education Scotland 3-week review
Friday 29 March – Friday 12 April 2024	School holidays
Tuesday 23 April 2023	Education Service receive report from Education Scotland
Friday 26 April 2024	Sign off Education Scotland report
Tuesday 14 May 2024	Consultation Report published 3 weeks before the Cabinet Committee
Thursday 6 June 2024	Report submitted to the Cabinet Committee
Thursday 13 June 2024	End of Fife Council Call-In Period
Friday 17 August 2024	End of Scottish Government Call-In Period
Monday 19 August 2024	Proposed date of implementation

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BT Text phone number for Deaf people 18001 01383 441177

LANGUAGE LINES

এ নথিতে যেসব তথ্য আছে তা 03451555599 এ নাম্বারে ফোন করে অনুরোধ করলে বড় ছাপা, ব্রেইল, ওডিও সিডি/টেইপ ও ব্রিটিশ সাইন ল্যাংগুয়েজ ইত্যাদি মাধ্যমে পাওয়া যাবে।

কলের জন্য ইউকে ল্যান্ডলাইন থেকে খরচ হবে প্রতি মিনিটে ৩পি থেকে ৭পি, মোবাইলের খরচ ভিন্ন হতে পারে।

عند الطلب، يمكن توفير المعلومات الواردة في هذا المستند في صورة مستندات مطبوعة بأحرف كبيرة ومستندات بطريقة برايل وعلى أشرطة/أقراص مضغوطة صوتية مع الترجمة بلغة الإشارة البريطانية من خلال الاتصال بالرقم 03451 55 55 77 تتراوح تكلفة المكالمات بين 3 إلى 7 بنسات في الدقيقة من أي خط أرضي في المملكة المتحدة، وقد تختلف أسعار المكالمات بالهاتف المحمول.

如果你需要以大字體印刷、盲人點字、光碟/錄音帶格式或英國手語傳譯說明這份文件的內容，請致電 03451 55 55 88 提出要求。

用英國電訊固定座機撥打上述電話號碼收費每分鐘 3 至 7 便士，以手機撥打收費各異。

Informacje zawarte w tym dokumencie mogą zostać udostępnione w wersji drukowanej dużą czcionką, w alfabecie Braille'a, w wersji dźwiękowej na płycie CD/taśmie lub w tłumaczeniu na brytyjski język migowy – prosimy o kontakt pod numerem 03451 55 55 44.

Koszt połączenia wynosi 3-7p za minutę z brytyjskich telefonów stacjonarnych, koszty połączeń z telefonów komórkowych mogą być różne.

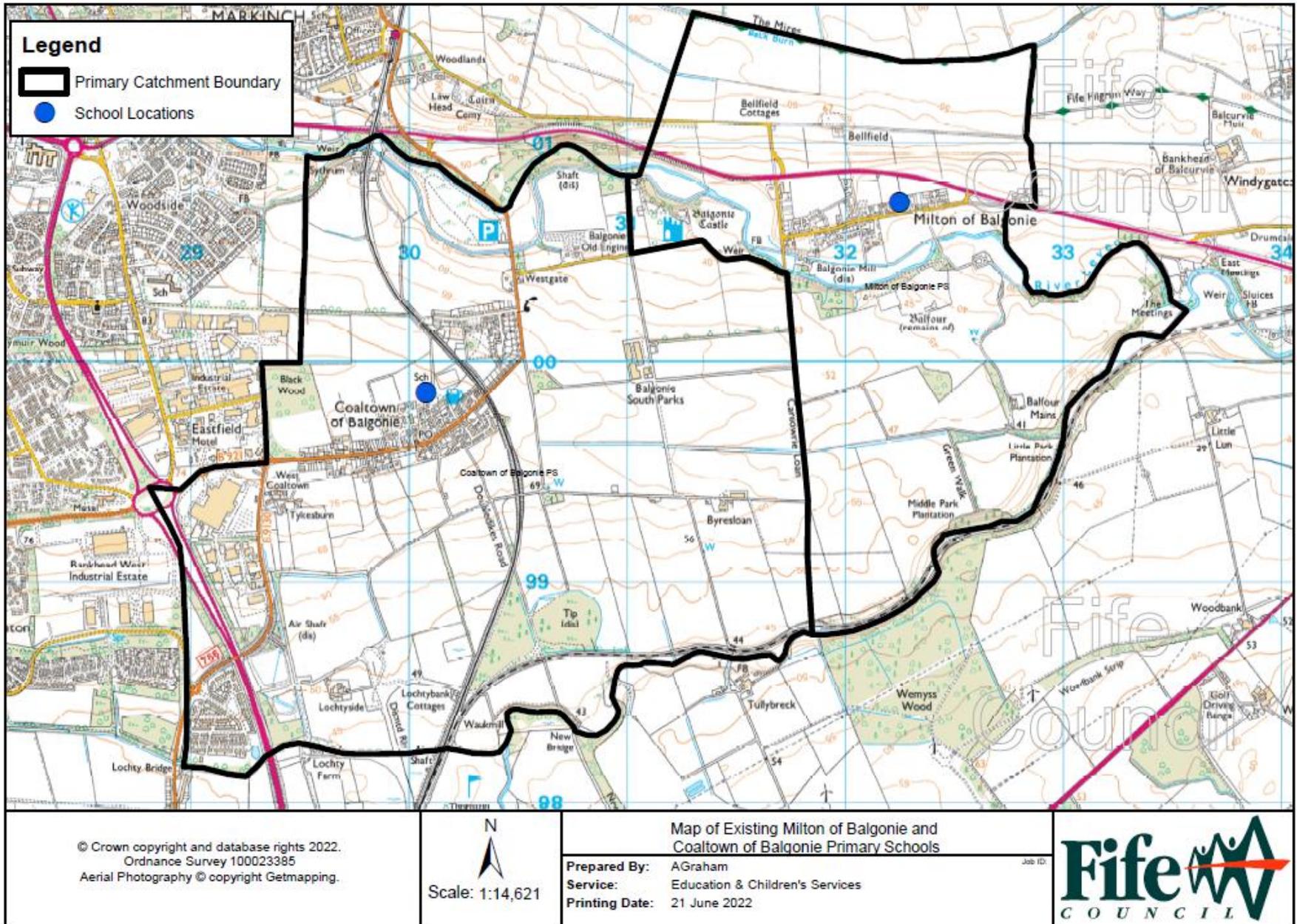
ਇਸ ਦਸਤਾਵੇਜ਼ ਵਿਚਲੀ ਜਾਣਕਾਰੀ ਟੈਲੀਫੋਨ ਨੰਬਰ 03451 55 55 66 ਰਾਹੀਂ ਮੰਗ ਕਰਨ ਉੱਤੇ ਵੱਡੇ ਅੱਖਰਾਂ, ਬ੍ਰੇਅਲ, ਆਡੀਓ ਸੀ.ਡੀ./ਟੇਪ ਅਤੇ ਬ੍ਰਿਟਿਸ਼ ਸਾਈਨ ਲੈਂਗੂਏਜ ਦੇ ਅਨੁਵਾਦ ਵਿਚ ਮੁਹੱਈਆ ਕਰਾਈ ਜਾ ਸਕਦੀ ਹੈ।

ਯੂ.ਕੇ. ਲੈਂਡਲਾਈਨ ਰਾਹੀਂ ਕਾਲ ਕਰਨ ਦਾ ਖਰਚਾ 3 ਤੋਂ 7 ਪੈਨੀਆਂ ਪ੍ਰਤੀ ਮਿੰਟ ਹੋਵੇਗਾ, ਮੋਬਾਈਲਾਂ ਦੇ ਰੇਟ ਵੱਖਰੇ ਵੱਖਰੇ ਹੋ ਸਕਦੇ ਹਨ।

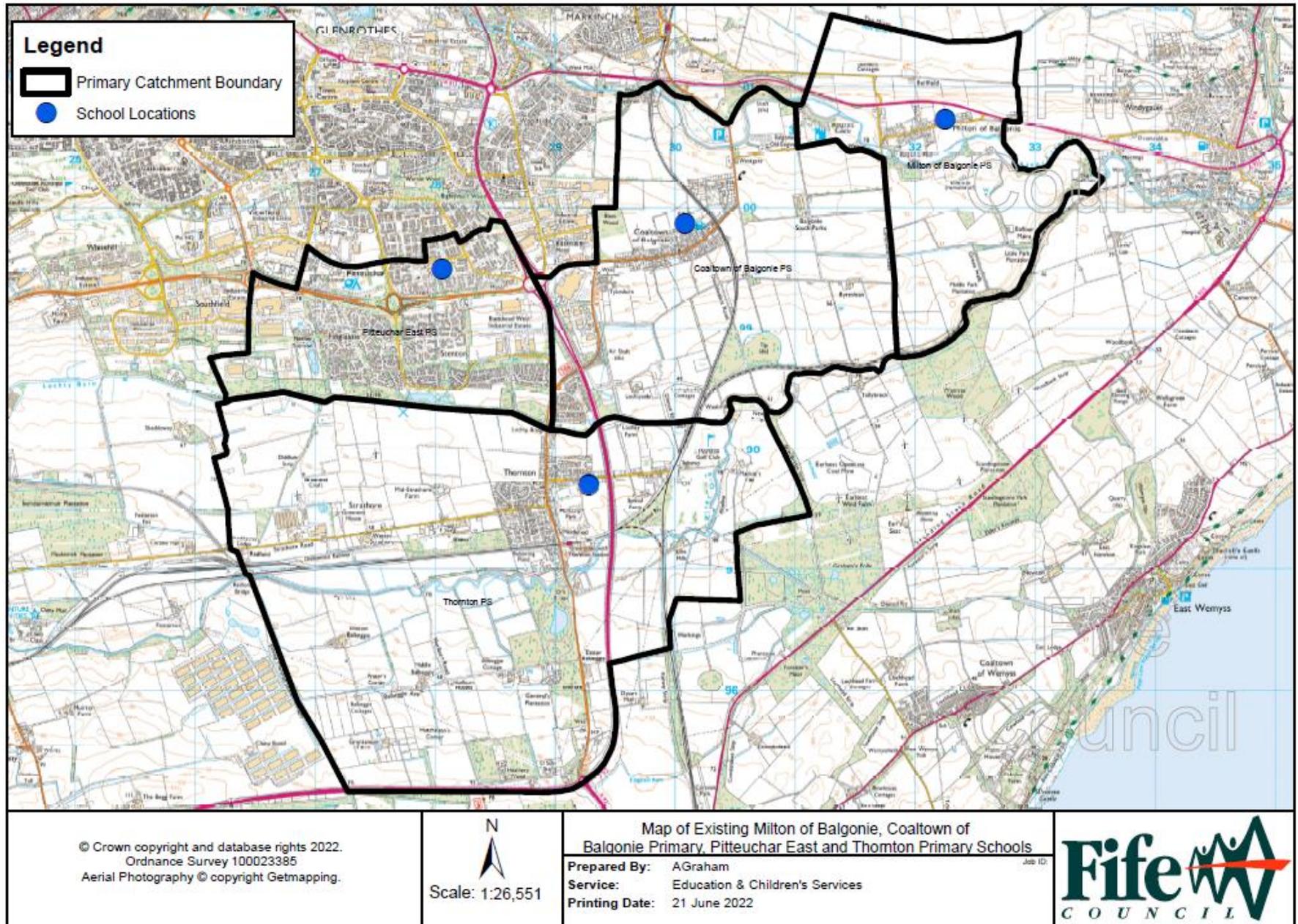
03451 55 55 66 پر درخواست کرنے سے اس تحریر میں دی گئی معلومات بڑے پرنٹ 'بریل' آڈیو سی ڈی/ٹیپ پر اور ترجمانی والی برطانوی اشاراتی زبان (برٹش سائن لینگویج) میں مہیا کی جاسکتی ہیں۔

کسی برطانوی لینڈ لائن سے فون کے نرخ 3 تا 7 پنس فی منٹ ہیں' موبائل کے نرخ مختلف ہوسکتے ہیں۔

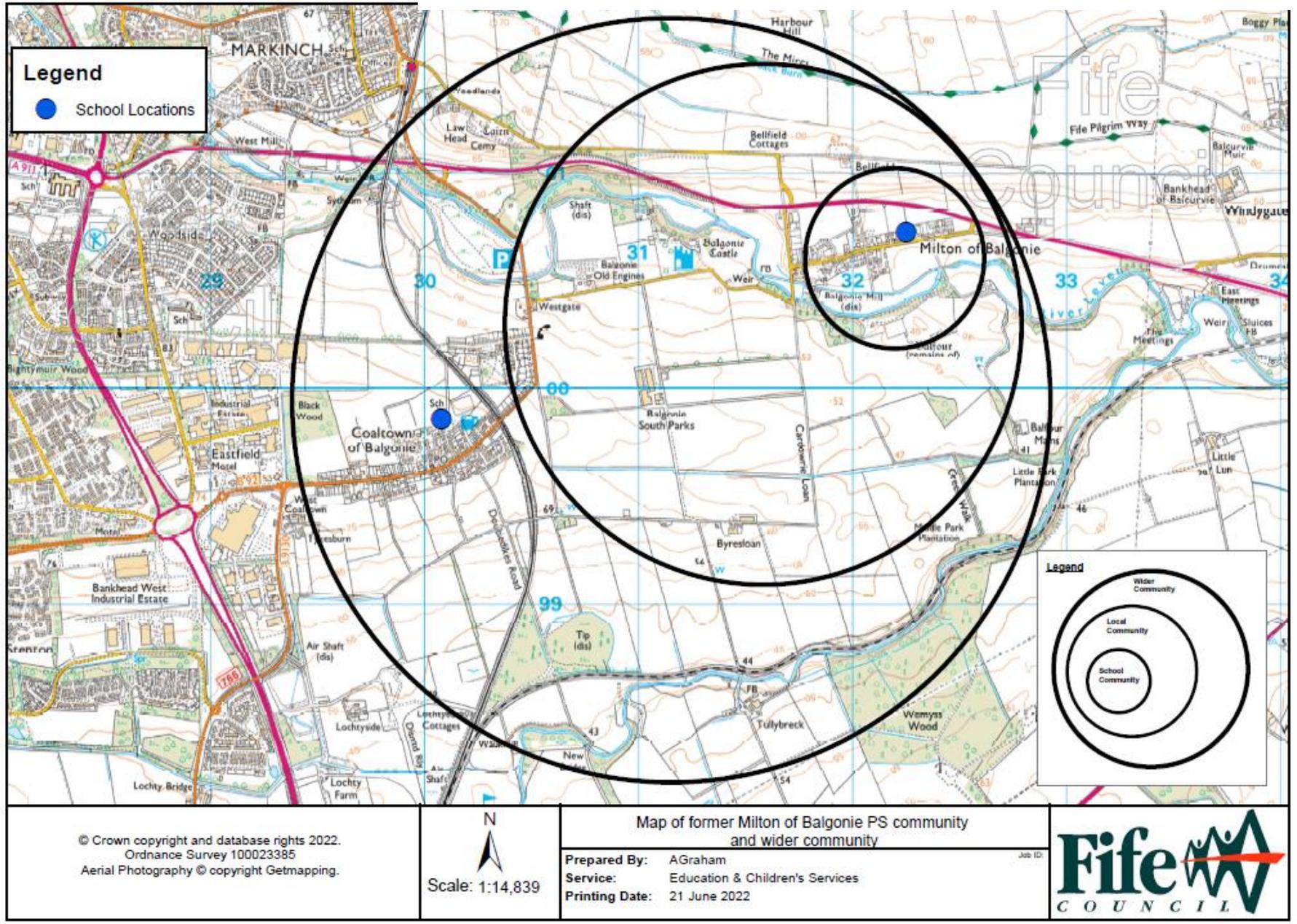
Appendix 1 - Map of existing catchment areas – Coaltown of Balgonie and Milton of Balgonie



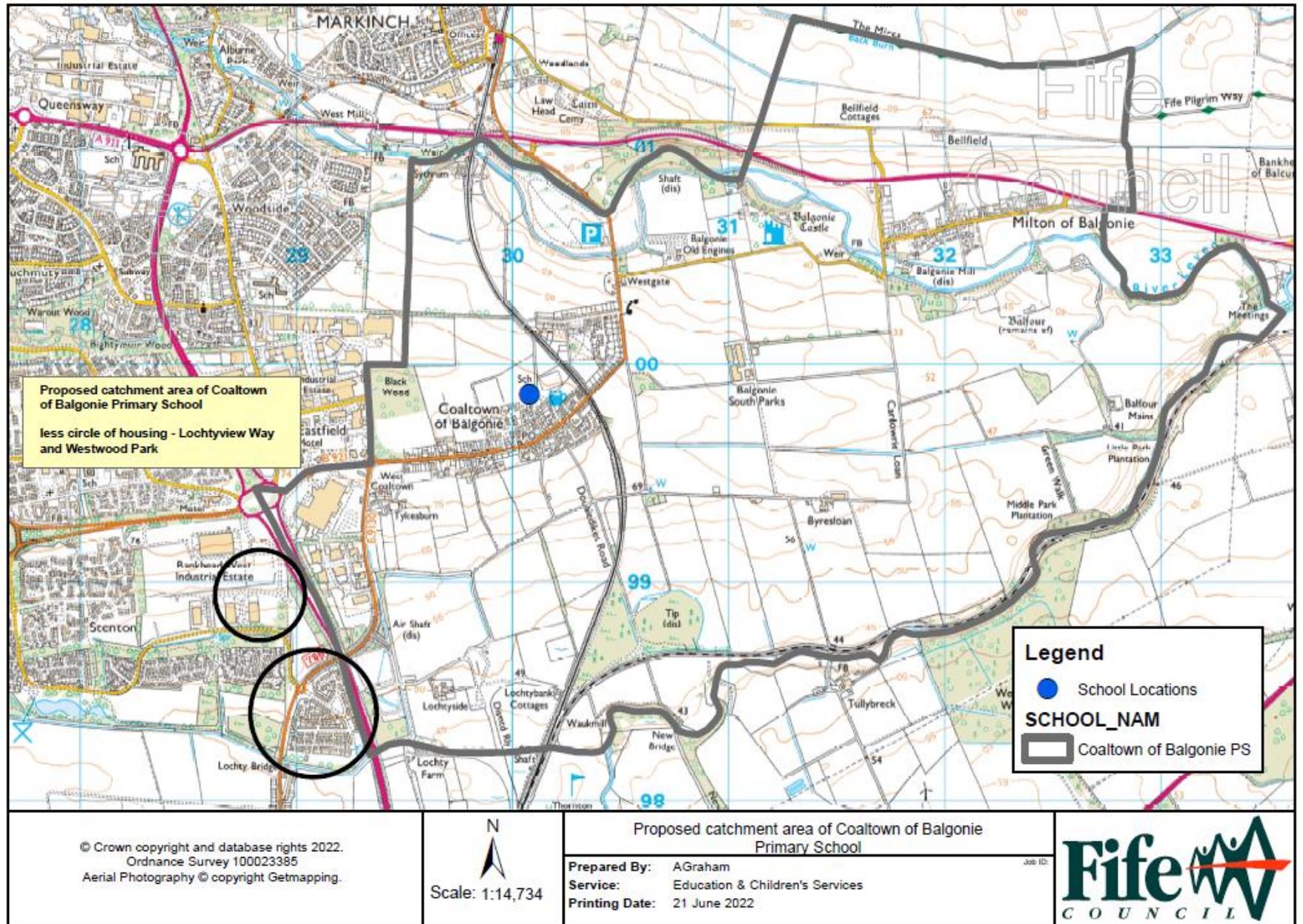
Appendix 2 - Map of existing catchment areas including Pitteuchar East and Thornton Primary Schools



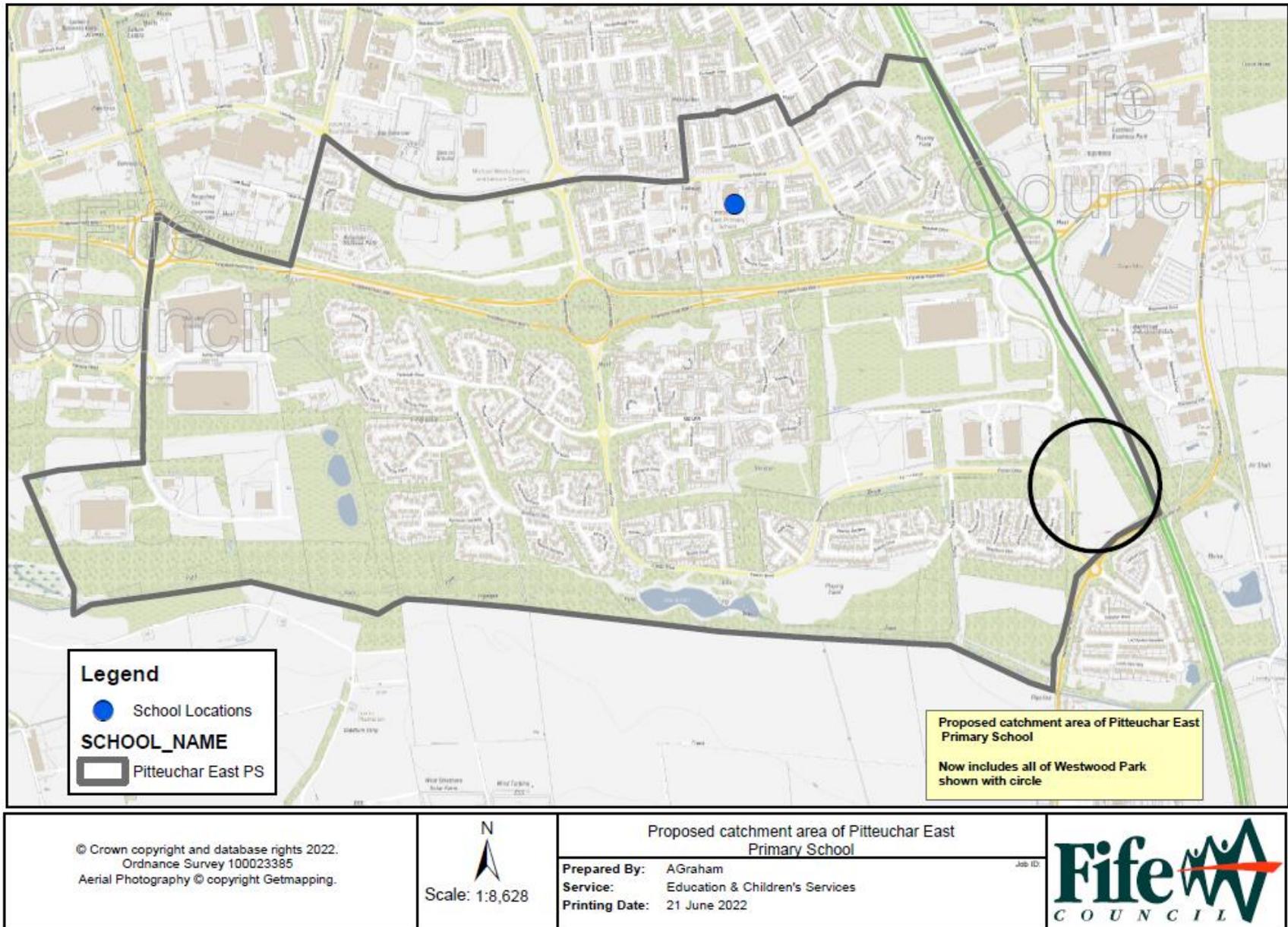
Appendix 3 - Map of existing Milton community and wider community



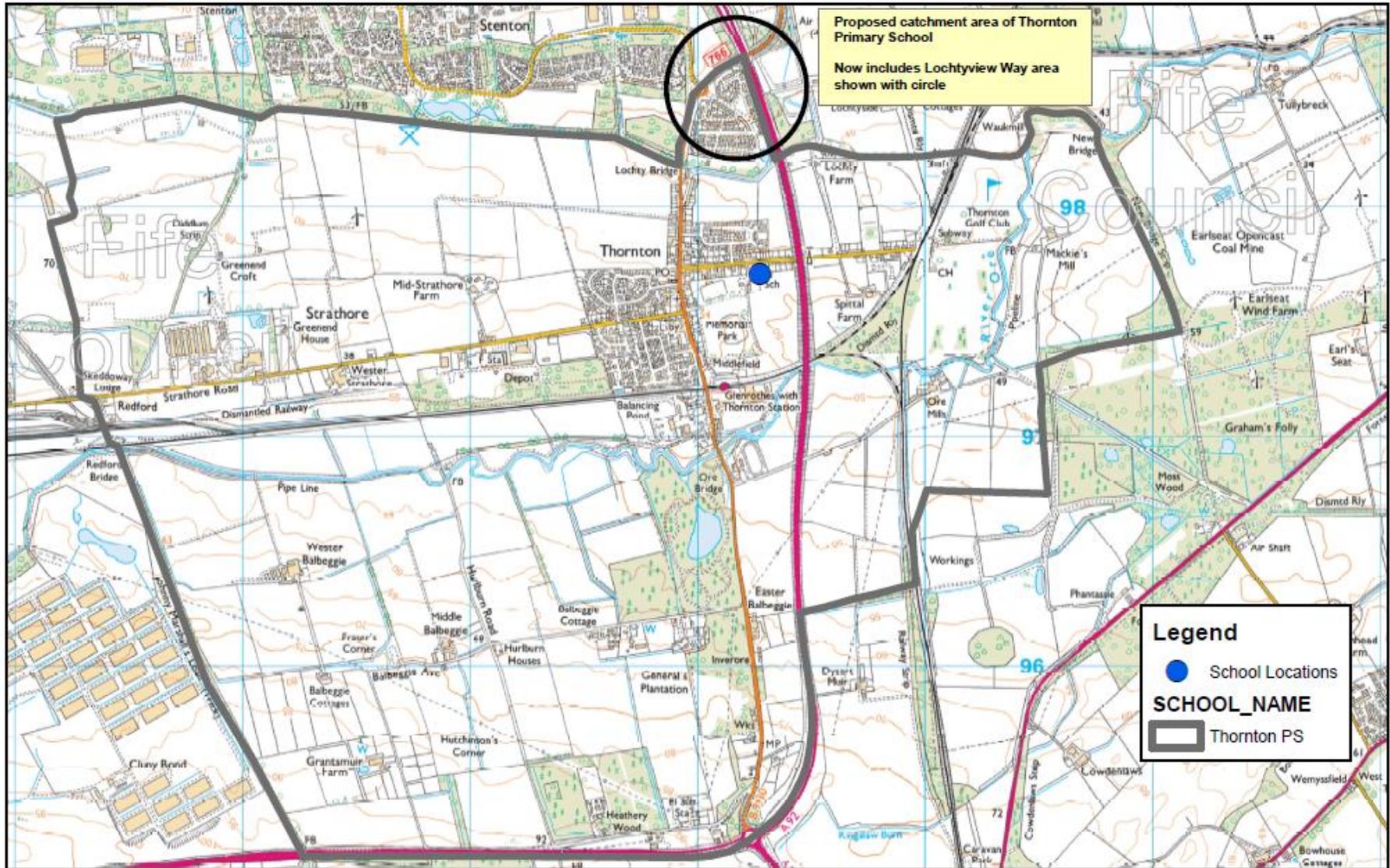
Appendix 4 - Map of proposed Coaltown of Balgonie Primary School catchment area



Appendix 5 - Map of proposed Pitteuchar East Primary School catchment area



Appendix 6 - Map of proposed Thornton Primary School catchment area



Proposed catchment area of Thornton Primary School
 Now includes Lochtyview Way area shown with circle

Legend

- School Locations
- SCHOOL_NAME**
- Thornton PS

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 Aerial Photography © copyright Getmapping.

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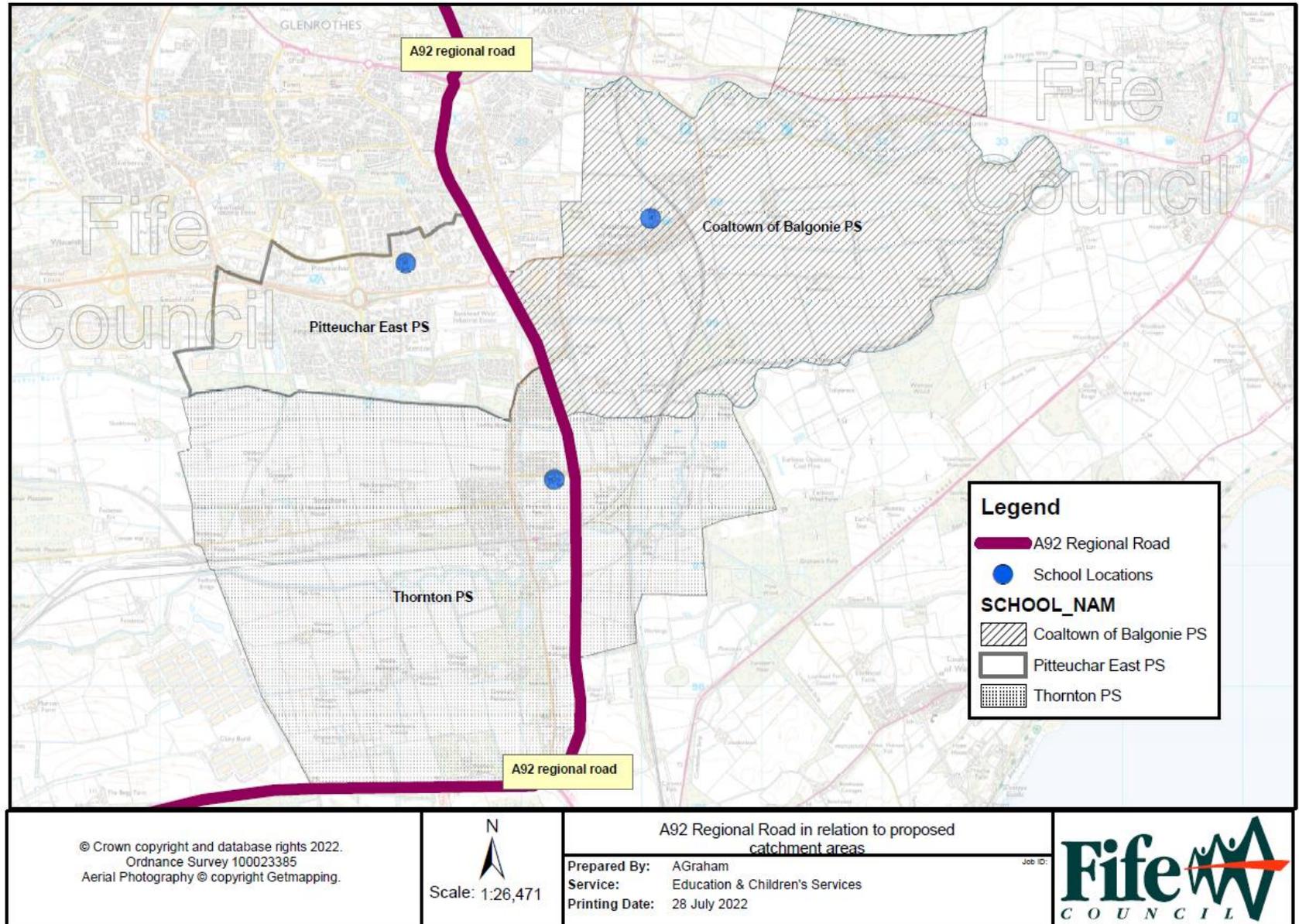
 Scale: 1:15,026

Proposed catchment area of Thornton Primary School

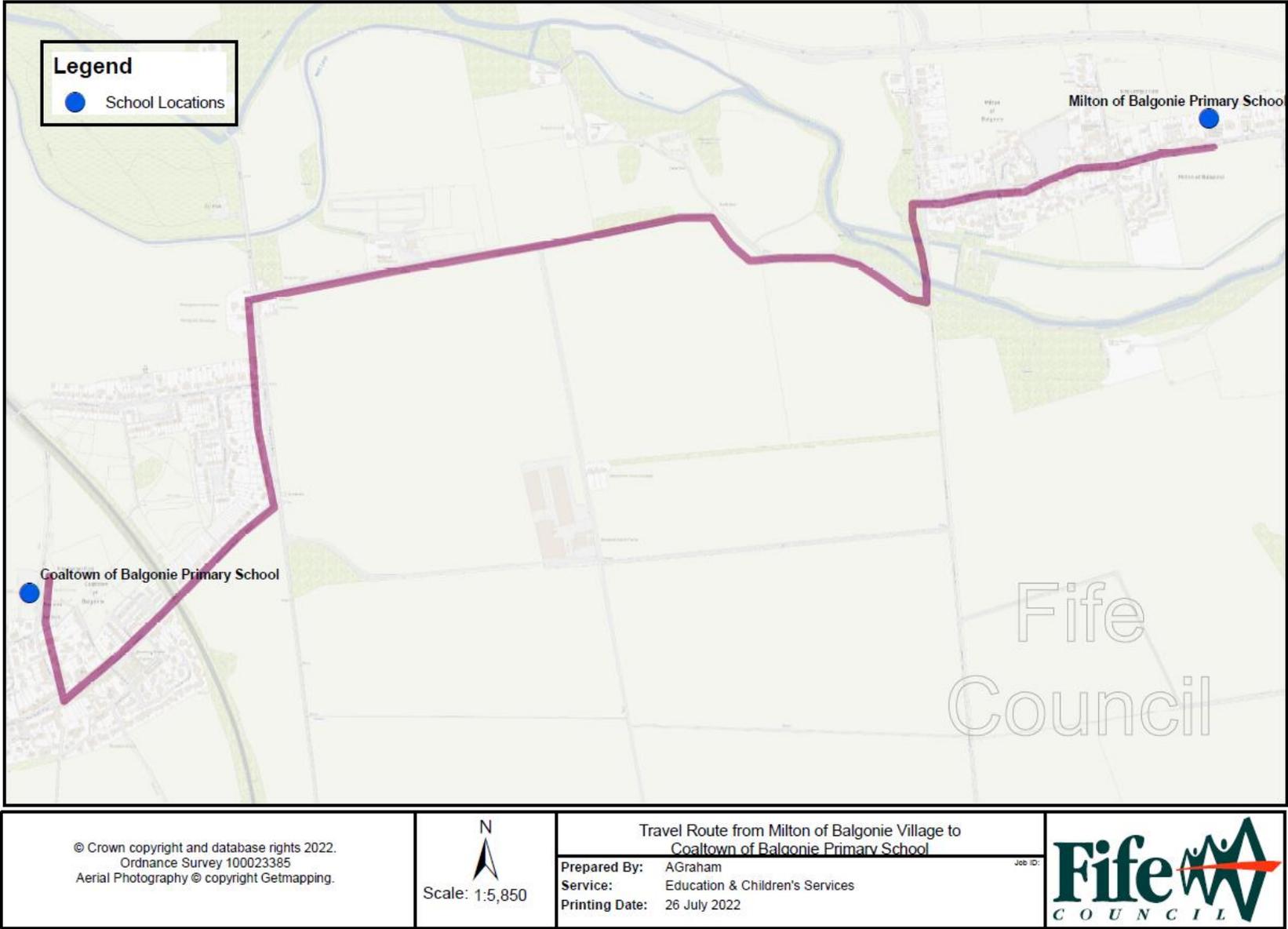
Prepared By: AGraham
 Service: Education & Children's Services
 Printing Date: 21 June 2022



Appendix 7 - Map showing proposed catchment areas with the A92 regional road



Appendix 8 – Travel route currently in use by pupils being transported from Milton of Balgonie village to Coaltown of Balgonie Primary School



Appendix 9 – Core Facts

School Name	Milton of Balgonie	Coaltown of Balgonie	Pitteuchar East	Thornton
Condition	B	B	B	B
Suitability	B	B	B	A
Accessibility	D	C	B	B
Capacity May 2023	75	100	367	261
School Roll Sept 2022	0	102	249	158
Distance from Milton	-	1.7 miles	3.1 miles	3.4 miles
Nursery on site	No	No	Yes	Yes
Rural school	Yes	No	No	No
Out of School club	No	No, collection pm from Coaltown of Balgonie PS, club held at Carleton PS	Yes (pm only)	In discussion
Village Hall	Yes	Yes	-	Yes
Transport Costs	£5,700	£59,622	-	-

Appendix 10 - Financial analysis

Proposal for the Closure of Milton of Balgonie Primary School and the rezoning of Coaltown of Balgonie		
The figures below detailed the budget allocation for the full financial year costs associated at that time		
Estimated savings from closure		
Staff Costs	£	
Teachers staffing	54,184	Assuming no increase in classes/job-sizing at Coaltown of Balgonie as pupils have been absorbed into existing classes in the receiving school
Admin & clerical	17,116	No additional Admin & clerical resource required in Coaltown of Balgonie which is a receiving school
Classroom assistant	11,525	No increase in Coaltown of Balgonie required
Teacher training	10	Saving
Other training	44	Saving
Saving on Staff Costs	82,879	
Premises Costs		
Saving on Premises Costs	14,722	Assumed full amount saved once building is disposed.
Other Costs		
Travel Exp-Mileage	41	Saving
Furniture	100	Saving
A Allocation (Classroom Resources)	470	Saving
B Allocation (Facilities Management Resources)	400	Saving
Parents Council	370	Saving
Supplies & Services	0	
Saving on Other Costs	1,381	
Transport Costs		
Milton of Balgonie to Coaltown of Balgonie	(5,700)	Cost for session 2023/24
MILTON OF BALGONIE SAVINGS	93,282	

Receiving Schools Additional Costs		
As a consequence of closing Milton of Balgonie and rezoning the catchment areas of Coaltown of Balgonie, Pitteuchar East and Thornton Primary School – the transportation from Lochtyview will continue for a period	£59,622	Costs will diminish over time as pupils progress through the school – the costs equate to 2 minibuses as a standard bus is unable to access the street to the school (for session 2023/24).
NET SAVINGS	£33,360	

Core Facts

Core Facts are a series of data which are collected by local authorities to measure progress and success of a school estate strategy as well as benchmarking against other local authorities in Scotland. The core facts are used at both local and national level to:

- establish a baseline
- inform targets
- inform spending decisions
- support monitoring and evaluation of progress over time
- support assessments of value for money.

More information is available at: [School estates: core facts overview - gov.scot \(www.gov.scot\)](http://www.gov.scot/resources/consultation-papers/collections/documents/School-estates-core-facts-overview.pdf)

School Condition Rating

Condition core facts are established by professional review, carried out by the Council's Asset & Facilities Management Service. Schools are assessed against a range of criteria set down by the Scottish Government and are examined on a 5-year rolling programme.

- 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 – Life expired and/or serious risk of imminent failure.

School Suitability Rating

Suitability core facts are established through a similar process to the condition core facts process, undertaken by Headteacher and Business Managers.

This information assesses how well the school environment supports the delivery of the curriculum against criteria laid down by the Scottish Government.

- A: Good – Performing well and operating efficiently (the school buildings support the delivery of services to children and communities)
- B: Satisfactory – Performing well but with minor problems (the school buildings generally support the delivery of services to children and communities)
- C: Poor – Showing major problems and/or not operating optimally (the school buildings impede the delivery of activities that are needed for children and communities in the school)
- D: Bad – Does not support the delivery of services to children and communities (the school buildings seriously impede the delivery of activities that are needed for children and communities in the school).

Suitability surveys are reviewed by Headteachers/Business Managers every 5 years through a rolling programme. Where school investment has been carried out in a particular school, the following year's Core Facts Update will be amended to reflect any subsequent change to the condition, suitability or accessibility rating.

School Accessibility Rating

Accessibility ratings are collated by the School Estate Team, along with the Education Access Officer, who undertake surveys of all the school buildings. These ratings are then ratified by the Accessibility Strategy Group. The ratings are classified as follows:

- A: Fully accessible
- B: Building partially accessible but Curriculum accessible
- C: Partially accessible or not currently accessible but has the potential to be made accessible
- D: Inaccessible and unable to be reasonably adapted to be made accessible.

As part of the Accessibility Strategy, there will be a number of accessible schools in each geographical area.

Local Development Plan

Fife Council adopted FIFEplan (Fife's Local Development Plan) on 21 September 2017. This plan details the local development changes to infrastructure within settlements and include new plans with planning consent. The Council are currently inviting communities to create Local Place Plans, which will help shape the next Local Development Plan. More information is available at [Invitation to create Local Place Plans](#) page.

Housing Land Audit

Enterprise, Planning & Protective Services undertakes an annual audit (known as the Housing Land Audit) of the Housing Land Supply in Fife, using 1st April as the base date. The Audit monitors housing completions and makes predictions about future house building in Fife.

Homes for Scotland (representing the national house builders) and local developers are consulted on the information to be included in the Housing Land Audit to discuss and agree the Audit as far as possible. The latest publication for 2021 is published at [Planning Information and Land Use Audits | Fife Council](#)

Public Private Partnership (PPP)

There are 2 existing contracts in Fife (PPP1 and PPP2) where schools have been procured and constructed through this process. The schools are maintained for a period of 25 years by a contractor and after 25 years the building is handed to the Council for future repair and maintenance. An annual unitary charge includes design and construction, services delivery including building and grounds maintenance, finance costs, legal, insurances, management and risk.

Life Cycle Costs

Costs for replacing assets at the end of their life span. These include building, fabric, services and furniture and equipment to ensure the asset is maintain is a substantial condition.

Efficiency Range 80-100%

No local authority can effectively run at 100% occupied. The 80%-100% efficiency range allows a degree of flexibility within schools to support Curriculum for Excellence.

Cost per Pupil Calculation

The cost per pupil calculation for schools is computed in July of each year. The calculation is intended to bring together all comparable costs for each school and benchmark these at individual school level through the production of a cost per pupil figure.

The calculation is currently based on the School Revenue Budget Statements that are issued to schools in April of each year. The calculation takes into account a number of factors particularly the school roll from the last census at September of the previous year. The calculation takes schools running costs including an allocation for janitorial staffing costs. It excludes the costs for school transport, depreciation and the financing costs of schools built under PFI contract arrangements (PPP schools).

Having identified the relevant running costs for each school and by dividing these costs by the school roll this produces a cost per pupil figure which is used for comparison purposes.

Proposal Paper

The Schools (Consultation) (Scotland) Act 2010 provides that where an education authority has formulated a relevant proposal in relation to any school, it must comply with the requirements of the Act before proceeding with the proposal. One of the requirements is that it must prepare and publish a proposal paper. Section 4 of the Act provides:

4 Proposal paper

- (1) The education authority must prepare a proposal paper which—
 - (a) sets out the details of the relevant proposal,
 - (b) proposes a date for implementation of the proposal,
 - (c) contains the educational benefits statement in respect of the proposal,

- (d) refers to such evidence or other information in support of (or otherwise relevant in relation to) the proposal as the education authority considers appropriate.
- (2) The proposal paper must also give a summary of the process provided for in [sections 1 to 17D] (so far as applicable in relation to the proposal).
 - (2A) Where a proposal paper relates to a closure proposal, it must also contain information about the financial implications of the proposal.
- (3) A proposal paper may include more than one proposal.
- (4) The education authority must—
 - (a) publish the proposal paper in both electronic and printed form,
 - (b) make the paper, and (so far as practicable) a copy of any separate documentation that it refers to under subsection (1)(d), available for inspection at all reasonable times and without charge—
 - (i) at its head office and on its website,
 - (ii) at any affected school or at a public library or some other suitable place within the vicinity of the school,
 - (c) provide without charge the information contained in the proposal paper—
 - (i) to such persons as may reasonably require that information in another form, and
 - (ii) in such other form as may reasonably be requested by such persons.
- (5) The education authority must advertise the publication of the proposal paper by such means as it considers appropriate.

Educational Benefits Statement

The Schools (Consultation) (Scotland) Act 2010 provides that where an education authority has formulated a relevant proposal in relation to any school, it must comply with the requirements of the Act before proceeding with the proposal. One of the requirements is that it must prepare an educational benefits statement. Section 3 of the Act provides:

3 Educational benefits statement

- (1) The education authority must prepare an educational benefits statement which includes:
 - (a) the authority's assessment of the likely effects of a relevant proposal (if implemented) on:
 - (i) the pupils of any affected school,
 - (ii) any other users of the school's facilities,
 - (iii) any children who would (in the future but for implementation) be likely to become pupils of the school,
 - (iv) the pupils of any other schools in the authority's area,
 - (b) the authority's assessment of any other likely effects of the proposal (if implemented),
 - (c) an explanation of how the authority intends to minimise or avoid any adverse effects that may arise from the proposal (if implemented),
 - (d) a description of the benefits which the authority believes will result from implementation of the proposal (with reference to the persons whom it believes will derive them).
- (2) The statement must also include the education authority's reasons for coming to the beliefs expressed under subsection (1)(d).
- (3) In subsection (1), the references to effects and benefits are to educational effects and benefits.

Rural School

In terms of the Schools (Consultation) (Scotland) Act 2010 a rural school is a school designated as rural by Scottish Ministers. Section 14 provides:

14 Designation of rural schools

- (1) In this Act, a “rural school” is a school which is designated as such by its inclusion in the list of rural schools maintained by the Scottish Ministers for the purposes of this subsection.
- (2) In determining the question of rurality when considering whether a school falls to be included in or excluded from the list of rural schools, the Scottish Ministers are to have regard (in particular) to:
 - (a) the population of the community (or settlement) in which the school is located,
 - (b) the geographical circumstances of that community (or settlement) including its relative remoteness or inaccessibility.
- (3) The list of rural schools is to be accompanied by an explanation of how the Scottish Ministers devised the list:
 - (a) by reference to subsection (2), and
 - (b) if they consider it appropriate, by reference to any recognised criteria available from a reliable source.
- (4) The Scottish Ministers are to:
 - (a) monitor the list of rural schools (and update it as regularly as they consider necessary),
 - (b) publish it (including as updated) in such way as they consider appropriate.
- (5) An education authority must provide the Scottish Ministers with such information as they may reasonably require of it in connection with the list of rural schools.

Special Provision for Rural Schools

11A Presumption against rural school closure

- (1) This section applies in relation to any closure proposal as respects a rural school.
- (2) The education authority may not decide to implement the proposal (wholly or partly) unless the authority—
 - (a) has complied with sections 12, 12A and 13, and
 - (b) having so complied, is satisfied that such implementation of the proposal is the most appropriate response to the reasons for formulating the proposal identified by the authority under section 12A(2)(a).
- (3) The authority must publish on its website notice of—
 - (a) its decision as to implementation of the proposal, and
 - (b) where it decides to implement the proposal (wholly or partly), the reasons why it is satisfied that such implementation is the most appropriate response to the reasons for formulating the proposal identified by the authority under section 12A(2)(a).

12 Factors for rural closure proposals

- (1) Subsection (2) applies in relation to any closure proposal as respects a rural school.
- (2) The education authority must have special regard to the factors mentioned in subsection
- (3) The factors are—
 - (a) [...] **1** (Repealed by Children and Young People (Scotland) Act 2014 asp 8 (Scottish Act) Pt 15 s.80(2)(a) (August 1, 2014: repeal has effect subject to transitional provision specified in SSI 2014/165art.5)
 - (b) the likely effect on the local community in consequence of the proposal (if implemented),
 - (c) the likely effect caused by any different travelling arrangements that may be required in consequence of the proposal (if implemented).
- (4) For the purpose of subsection (3)(b) [and sections 12A(2)(c)(ii) and 13(5)(b)(ii)] **2**, the effect on the community is to be assessed by reference (in particular) to—
 - (a) the sustainability of the community,
 - (b) the availability of the school's premises and its other facilities for use by the community.

- (5) For the purpose of subsection (3)(c) and sections 12A(2)(c)(iii) and 13(5)(b)(iii) **3** —
- (a) the effect caused by such travelling arrangements includes (in particular)—
 - (i) that on the school's pupils and staff and any other users of the school's facilities,
 - (ii) any environmental impact,
 - (b) the travelling arrangements are those to and from the school of (and for) the school's pupils and staff and any other users of the school's facilities.

12A Preliminary requirements in relation to rural school closure

- (1) This section applies where an education authority is formulating a closure proposal as respects a rural school.
- (2) The authority must—
- (a) identify its reasons for formulating the proposal,
 - (b) consider whether there are any reasonable alternatives to the proposal as a response to those reasons,
 - (c) assess, for the proposal and each of the alternatives to the proposal identified under paragraph (b) (if any)—
 - (i) the likely educational benefits in consequence of the implementation of the proposal, or as the case may be, alternative,
 - (ii) the likely effect on the local community (assessed in accordance with section 12(4)) in consequence of such implementation,
 - (iii) the likely effect that would be caused by any different travelling arrangements that may be required (assessed in accordance with section 12(5)) in consequence of such implementation.
- (3) For the purposes of this section and section 13, reasonable alternatives to the proposal include (but are not limited to) steps which would not result in the school or a stage of education in the school (within the meaning of paragraph 12 of schedule 1) being discontinued.
- (4) The authority may not publish a proposal paper in relation to the proposal unless, having complied with subsection (2), it considers that implementation of the closure proposal would be the most appropriate response to the reasons for the proposal.
- (5) In this section and section 13, the references to the reasons for the proposal are references to the reasons identified by the education authority under subsection (2)(a).

13 Additional consultation requirements

- (1) This section applies in relation to any closure proposal as respects a rural school.
- (2) The proposal paper must additionally—
- (a) explain the reasons for the proposal,
 - (b) describe what (if any) steps the authority took to address those reasons before formulating the proposal,
 - (c) if the authority did not take such steps, explain why it did not do so,
 - (d) set out any alternatives to the proposal identified by the authority under section 12A(2)(b),
 - (e) explain the authority's assessment under section 12A(2)(c),
 - (f) explain the reasons why the authority considers, in light of that assessment, that implementation of the closure proposal would be the most appropriate response to the reasons for the proposal.
- (3) The notice to be given to relevant consultees under section 6(1) must—
- (a) give a summary of the alternatives to the proposal set out in the proposal paper,
 - (b) state that written representations may be made on those alternatives (as well as on the proposal), and
 - (c) state that written representations on the proposal may suggest other alternatives to the proposal.

- (4) In sections 8(4)(c), 9(4) and 10(2)(a), the references to written representations on the proposal include references to written representations on the alternatives to the proposal set out in the proposal paper.
- (5) When carrying out its review of the proposal under section 9(1), the education authority is to carry out—
 - (a) for the proposal and each of the alternatives to it set out in the proposal paper (if any), a further assessment of the matters mentioned in section 12A(2)(c)(i) to (iii), and
 - (b) an assessment, in relation to any other reasonable alternative to the proposal suggested in written representations on the proposal, of—
 - (i) the likely educational benefits in consequence of the implementation of the alternative,
 - (ii) the likely effect on the local community (assessed in accordance with section 12(4)) in consequence of such implementation,
 - (iii) the likely effect that would be caused by any different travelling arrangements that may be required (assessed in accordance with section 12(5)) in consequence of such implementation.
- (6) The consultation report must additionally explain—
 - (a) the education authority's assessment under subsection (5)(a),
 - (b) how that assessment differs (if at all) from the authority's assessment under section 12A(2)(c),
 - (c) the authority's assessment under subsection (5)(b),
 - (d) whether and, if so, the reasons why the authority considers that implementation of the proposal (wholly or partly) would be the most appropriate response to the reasons for the proposal.

Appendix 12 – Consultation Response Form

FIFE COUNCIL – EDUCATION AND CHILDREN’S SERVICES DIRECTORATE CONSULTATION RESPONSE FORM

Proposal to close Milton of Balgonie Primary School and rezone the catchment areas of Coaltown of Balgonie Primary School, Pitteuchar East and Thornton Primary Schools from Monday 19 August 2024.

Section 1 - Your Details

(to be provided by parent/carers or interested parties to enable the local authority to inform any person who makes written representations on the proposal of the publication of the consultation report as required by the Schools (Consultation) (Scotland) Act 2010).

Name	
Address	
Postcode	
Email address (if applicable)	

Section 2 - Please identify yourself from the following as being your main interest (choose one) in responding to this consultation:

I am a:	Tick ✓
Parent/Carer	
Pupil	
Staff member	
Grandparent	
Member of the Community Council	
Resident in the community	

What education establishment do you have a link with?	Tick ✓
Coaltown of Balgonie PS	
Pitteuchar East PS	
Thornton PS	
Another primary School in the Glenrothes area	
Any nursery in the Glenrothes local area	
Auchmuty High School	

Do you live in the Milton of Balgonie PS catchment area?	Tick ✓
Yes	
No	

Section 3 - Your Views

Question 3.1 Do you support the proposal to close Milton of Balgonie Primary School and rezone the catchment area of Coaltown of Balgonie Primary School to include the existing catchment area of Milton of Balgonie from Monday 19 August? **(please tick (✓) either agree, disagree or don't know)**

Agree			Disagree			Don't know	
-------	--	--	----------	--	--	------------	--

If you agree with the proposal, what are your reasons? (Please list these below)

If you disagree with the proposal, what are your reasons? (Please list these below)

Are there any further comments on the proposal you would like to make and/or any alternatives to the proposal you would like to suggest? (Please list these below)

Question 3.2 Do you support the proposal to rezone part of the Coaltown of Balgonie Primary School catchment area (Lochtyview area) to Thornton Primary School catchment area from 28 June 2024? **(please tick (✓) either agree, disagree or don't know)**

Agree	<input type="checkbox"/>	<input type="checkbox"/>	Disagree	<input type="checkbox"/>	<input type="checkbox"/>	Don't know	<input type="checkbox"/>
-------	--------------------------	--------------------------	----------	--------------------------	--------------------------	------------	--------------------------

If you agree with the proposal, what are your reasons? (Please list these below)

If you disagree with the proposal, what are your reasons? (Please list these below)

Question 3.3 Do you support the proposal to rezone part of the Coaltown of Balgonie Primary School catchment area (Westwood Park) to Pitteuchar East Primary school catchment area from 28 June 2024? **(please tick (✓) either agree, disagree or don't know)**

Agree	<input type="checkbox"/>	<input type="checkbox"/>	Disagree	<input type="checkbox"/>	<input type="checkbox"/>	Don't know	<input type="checkbox"/>
-------	--------------------------	--------------------------	----------	--------------------------	--------------------------	------------	--------------------------

If you agree with the proposal, what are your reasons? (Please list these below)

If you disagree with the proposal, what are your reasons? (Please list these below)

Section 4 - About You

The following questions are **voluntary**. They are to assist Fife Council in fulfilling its obligations under the Equality Act 2010 in relation to the proposal. Your responses to these questions are confidential.

1. What is your age? **Please choose one** (✓).

18 or under		25-34		45-54		65-74	
19-24		35-44		55-64		75 and over	

2. What is your gender? **Please choose one** (✓).

Male		Female		Non-Binary		Prefer not to say	
------	--	--------	--	------------	--	-------------------	--

3. What is your ethnic background? **Please choose one** (✓).

White Scottish		African	
Other White British		Asian, Asian Scottish, or other Asian British	
Other White background		Caribbean or Black	
Mixed or multiple ethnic background		Other ethnic background	

4. Do you consider yourself as having a disability? **Please choose one** (✓).

YES			NO	
-----	--	--	----	--

Thank you for taking part in this consultation. For further information on how we use your data please visit: www.fife.gov.uk/privacy/education

Please complete online at:

- www.fife.gov.uk/miltonclosure **or**
- return this form by post to: Milton of Balgonie Primary School Closure Proposal, Education & Children's Services 4th floor (West), Fife House, North Street, Glenrothes, KY7 5LT

by close of business on Tuesday 12 March 2024.

Appendix 13 – Proposed Housing Sites

Housing Sites Across the 4 Primary School Catchment Areas

Site Name	HLA 2022 Status	Catchment Area	Local Development Plan (FIFEplan Site Capacity	HLA 2022 Site Capacity	Qty within planning application	Planning application	Planning Consent	Year Start	Year Finish
Balfour Place/Main Street	Non-effective	Milton of Balgonie	63	-	63	23/00231/Full	No	2023 – 30 units	2024/2025 – 33 units
Queens Meadow	Effective	Coaltown of Balgonie	50	74	80	22/04156/Full	Yes	2023 – 20 units p/a	2027
Millburn Avenue	Non-effective	Coaltown of Balgonie	88	-	102	23/00997/Full	No	2025 – 33 units p/a	2028
Pytree Road North	Non-effective	Coaltown of Balgonie	23	-	n/a	None to date	n/a	n/a	n/a
Westwood Park	Effective	Pitteuchar East/Coaltown of Balgonie	420	420	420	12/01300/PPP	Yes	2023 – 24 p/a	2040
Thornton East SLA	Effective	Thornton	900	900	300	20/01156/PPP	No	2024 – 60 units p/a	2029
Auction Mart	Non-effective	Thornton	26						
Land off Main Street	Non-effective	Thornton	5						
Network Rail Land to the east of Thornton	Non-effective	Thornton	10						
Orebank Terrace/Strathore Road	Non-effective	Thornton	294						
Middlefield Row	Effective	Thornton		15		18/03408/FULL	Yes		
Dormitory House, Main Street	Effective	Thornton	5			18/00581/PPP	Yes		
Land to South of Riverside	Effective	Thornton	5			19/01804/PPP			2025

Appendix 14 – Engagement Sessions

FIFE COUNCIL – EDUCATION AND CHILDREN’S SERVICES DIRECTORATE

**Engagement Session held at Coaltown of Balgonie Primary School
Tuesday, 7 November 2023 at 6.00 pm**

Present:

Shelagh McLean, Head of Education & Children’s Services (SMcL)

Lyn Meeks, Quality Improvement Officer (LM)

Kim Lawson, Compliance Officer, Education Service (KL)

5 people attended the session.

Shelagh McLean (SMcL) opened the meeting by introducing Fife Council representatives.

SMcL presented a PowerPoint presentation on the background of Milton of Balgonie Primary School, the current mothballing arrangement and how we move forward.

Below is a list of comments made by the stakeholders who attended the session:

1	Will any housebuilding in the Coaltown of Balgonie PS catchment area affect whether or not Milton of Balgonie PS reopens? If there were two schools there would be more space to allow for flexibility.
2	Are you aware of the number of births in the area?
3	It would be good if extracurricular activities could be undertaken at Milton of Balgonie PS.
4	How can the public get the school reopened? We did not know we could request a place at Milton of Balgonie PS.
5	It is unlikely you will fill P1-7 in a mothballed school.
6	I know there is a better social aspect in bigger schools.
7	Does the money saved from Milton of Balgonie PS come to Coaltown of Balgonie PS?
8	We would not send our children to Milton of Balgonie PS now as all of their friends are at Coaltown of Balgonie PS.
9	It would be good if Milton of Balgonie PS could be used for something educational
10	P1-7 in the one class is not a good idea.

Shelagh McLean concluded the meeting by thanking people for their attendance and their comments, as well as encouraging people to provide feedback by any of the various methods.

Meeting closed at 6.45pm.

FIFE COUNCIL – EDUCATION AND CHILDREN’S SERVICES DIRECTORATE

Engagement Session held at Village Hall, Dickson Lane, Milton of Balgonie
Wednesday, 8 November 2023 at 6.00 pm

Present:

Shelagh McLean, Head of Education & Children’s Services (SMcL)

Lyn Meeks, Quality Improvement Officer (LM)

Kim Lawson, Compliance Officer, Education Service (KL)

8 people attended the session.

Shelagh McLean (SMcL) opened the meeting by introducing Fife Council representatives.

SMcL presented a PowerPoint presentation on the background of Milton of Balgonie Primary School, the current mothballing arrangement and how we move forward.

Below is a list of comments made by the stakeholders who attended the session:

1	Mothballing is not a fair process as children who are now enrolled at Coaltown of Balgonie PS will not leave.
2	Milton of Balgonie PS did not close naturally. The quality of staff was poor and the parents started to move their children to other schools.
3	It was a money exercise.
4	Before Milton of Balgonie PS closed, they were advising people they were no longer able to accept placing requests.
5	The school roll did not naturally reduce to 0.
6	The closing of the school was all done underhandedly.
7	P1-7 in one class would not be any good. Previously, there was always a P1-4, and P5-7 regardless of the number of children attending.
8	The transport costs associated with children being bussed from Milton of Balgonie catchment to other schools would not be worth it. Milton of Balgonie PS would be better remaining open.
9	Outdoor learning and nurturing at Milton is ideal. It is not the same when children go elsewhere to learn.
10	When people make friends within the village, they make friends for life and are able to network within the community.
11	There is a loss of community within the village.
12	I strongly believe there is more learning and teaching undertaken in smaller classes.
13	Children are pushed on further at Milton of Balgonie PS as learning is more focussed due to the smaller classes.
14	It is harder for children to learn in a bigger class
15	When did P1-7 in the one class start? There were always two classes at Milton of Balgonie PS.
16	People missed out on enrolling at Milton of Balgonie PS.
17	Could Milton of Balgonie PS possibly open up as P1-4 only at the moment? There are currently 13 children in the village aged 0-5.
18	Could we make a placing request for our child to attend Milton of Balgonie PS?
19	People used to move to Milton so their child could attend Milton of Balgonie PS. People left when the school was closed.

20	Why would you extend Coaltown of Balgonie PS when there is an empty school in Milton of Balgonie?
21	House builders are being asked to make contributions for Coaltown of Balgonie PS however house builders in Milton of Balgonie are not being asked for the same. How does that work?
22	I disagree with the planning obligation payment being paid to Coaltown of Balgonie PS.
23	Milton of Balgonie PS never had a chance.
24	Milton of Balgonie has been smothered.
25	If you were to advertise that the school was reopening, children would come. What number of children would reopen the school?
26	We need an influx of children into the village.
27	Children should go to school in the area they live in.
28	I did not receive a letter in relation to this engagement session. I should have received a letter to give me a voice.
29	Most parents believe it is a done deal.
30	Communication is key in a process like this.
31	Milton of Balgonie will soon become a retirement village.
32	The village hall is all we have left in the village.
33	We have absolutely nothing here.
34	I am upset at how few people have turned up at the session tonight.
35	No one knows anyone anymore.
36	Milton of Balgonie PS was buzzing years ago.
37	I am happy to knock on every single door in the village and take flyers around.
38	People did not come tonight as they thought it was a session to tell us the date the building was going to permanently close.
39	The prices of houses in Milton of Balgonie stop young families from moving into the area.
40	People who have lived in the village for a while tend to live longer and are therefore in the village for longer.
41	Milton of Balgonie PS was a cracking wee school. I loved working there. We ran a gardening club which was extremely successful.
42	Children would also learn to be more independent as they would be able to walk to school regardless of where they stayed in the village.

Shelagh McLean concluded the meeting by thanking people for their attendance and their comments, as well as encouraging people to provide feedback by any of the various methods.

Meeting closed at 7.40pm.

Education and Children's Services

Engagement regarding the future of Milton of Balgonie Primary School

Coaltown of Balgonie PS – Tuesday 7th November – 6-7pm
Village Hall, Milton of Balgonie - Wednesday 8th November – 6-7pm

Shelagh McLean, Head of Service



Agenda

Current status with Milton of Balgonie Primary School

Births in the catchment area

Committee Decisions

Housing Building

Education Provision in Coaltown of Balgonie

Next Steps

Questions

Improving the learning environment is one of the key priorities for the Education & Children's Services Directorate and the status of Milton of Balgonie Primary School creates challenges for officers, as the building has not been operational for 4 academic sessions.

Our ambition is to manage schools that are fit for purpose, with suitable and efficient learning environments for children, young people and other learners now and in the future.

Appendix 15 – Presentation from November Engagement Sessions

Reason for the engagement sessions

- Fife Council will need to decide on the future of Milton of Balgonie Primary School, as no formal decision has been made to date
- The school has been mothballed from 26 January 2021 – the school has not formally closed.
- Within the legislative guidance from Scottish Government – mothballing a school for longer than a 3 year period is not supported
- To consider any proposal to change the arrangements relating to a school, a Statutory Consultation must be carried out in accordance with the Schools (Consultation) (Scotland) Act 2010
- Statutory Consultation process is designed to allow all statutory consultees the opportunity to engage, have their views heard and make representations
- These engagement sessions have been organised to help the Service to talk to parents/carers of all pupils living in Milton of Balgonie PS catchment area, all parents of pupils enrolled in Coaltown of Balgonie and any parents of nursery aged pupils living in Milton of Balgonie PS catchment area, to hear your views.
- These engagement sessions are not part of a formal statutory consultation

Milton of Balgonie PS & Catchment

- Milton of Balgonie Primary School is currently not operational i.e. is 'mothballed.'
- School has had no pupils on roll for sessions 2019/20, 2020/21, 2021/22, 2022/23 and no pupils have enrolled for session 2023/24
- The building is empty and is monitored by Fife Council's Property Services team.
- Any new primary age pupil within the village is offered a place at Coaltown of Balgonie Primary School.
- The Education Service has continued to review the number of pupils in the catchment area; the births in the catchment area and the proposed housing in the catchment area
- The Education Service has not been contacted by any family of primary aged children seeking the reopening of the school
- Fewer than 5 pupils have been born each year in the catchment area



Committee Decisions

- In January 2021, the building was formally mothballed by the Education and Children's Services Sub-Committee. 'Mothballing' requires an annual review.
- Since then, any Milton of Balgonie catchment area pupil enrolling for school will have been offered a place at Coaltown of Balgonie PS, and provided with free transport if they meet the distance criteria. Families can still choose Milton of Balgonie PS for enrolment purposes.
- 'Mothballing' requires an annual review, as a minimum. Following the first review, on 9 November 2021 the Education and Children's Services Sub-Committee continued the 'mothballing' decision and asked the Education Service to undertake another review of the position in June 2022
- In June 2022 – there was no substantial change in the village and a report was submitted to Cabinet Committee, in September 2022, seeking approval to undertake a statutory consultation on a proposal to close Milton of Balgonie PS and rezone Coaltown, Pitteuchar East and Thornton PS catchment areas. Cabinet Committee requested a report on proposed new housing in the catchment area and legal position with mothballing of a school
- A report to Cabinet Committee in November 2022 outlined the proposed housing in the catchment area and the legal position. Cabinet Committee agreed to continue with mothballing arrangements and asked for a further review in June 2023 on pupil numbers in the catchment area
- January 2024 – the school will have been mothballed for 3 years.



Next Steps

- We would like parent/carers and any interested stakeholders to complete the online form or complete a paper copy tonight
- We are seeking feedback on current arrangements and any comments you have on the current mothballing of the school
- The Education Service will review all the comments from stakeholders
- Information from these sessions will be included in a report to the Cabinet Committee of Fife Council in January 2024 when the Education Service will be required to recommend a way forward



House Building

- One new site in the Milton of Balgonie Primary School catchment area identified in the Local Development Plan.
- Balfour Place/Main Street for 63 units – site does not have planning consent yet
- If all the catchment pupils attended and the pupils materialised at 0.354 pupils per housing unit, the school is projected to have a maximum of one class
- This would mean P1-P7 pupils in the same class
- If the school was reopened, it would not necessarily mean all pupils who are enrolled in other schools would return



Discussion Have Your say at

<https://forms.office.com/e/ZHEAEJ2cQm>



OR

send comments to:

Sustainableschoolestate.enquiries@fife.gov.uk

11 January 2024
Agenda Item No. 12

Pedestrian and Cyclist Access to Household Waste Recycling Centres

Report by: John Rodigan, Head of Environment and Building Services and Simon Young, Service Manager, Fife Resource Solutions

Wards Affected: All

Purpose

To appraise committee of the public safety risks associated with creating pedestrian and cycling access to household waste recycling centres.

Recommendation

It is recommended that committee continue to allow Fife Resource Solutions to prohibit access for pedestrians and cyclists to household waste recycling centres.

Resource Implications

There are no resource implications.

Legal & Risk Implications

Failure to manage significant safety risks within council owned facilities could lead to investigation and prosecution by the Health and Safety Executive under the Health and Safety at Work act (1974).

Impact Assessment

An Equalities Impact Assessment is not required because the report does not propose a change or revision to existing policies and practices.

Consultation

The Trade Unions, Finance Service and Health and Safety officers from Fife Resource Solutions LLP and Environment and Building Services have been consulted.

1.0 Background

- 1.1 The Environment and Protective Services Sub-Committee meeting of 10 February 2022 requested that:
 - work be undertaken to provide pedestrian/cyclist access at Dalgety Bay, Lochgelly and Kirkcaldy Recycling Centres, subject to identifying funding; and
 - further investigation be carried out to provide pedestrian access at St. Andrews and Methil Recycling Centres.
- 1.2 The potential for pedestrian and cyclist access to recycling centres has given rise to public safety concerns. To assess the risk presented by these changes, Fife Resource Solutions and Environment and Building Services undertook separate safety reviews. (see Appendices 1 and 2).
- 1.3 Although the safety reviews were conducted at specific recycling centres, most of the findings and concerns relate to all such facilities across Fife.
- 1.4 Fife's recycling centres are designed for vehicles and are compliant with all health and safety guidelines. This compliance has ensured that there have been no vehicle / pedestrian collision accidents in the last five years.

2.0 Cyclist and Pedestrian Access – Safety Concerns

- 2.1 The primary sources of guidance for the management of safe vehicle and pedestrian movement within recycling centres are:
 - Health and Safety Executive - Guide to Workplace Transport Safety
 - Waste Industry Safety and Health Forum - Safe Transport at Waste and Recycling Sites

The guidance in both documents focuses on spacial requirements, barriers and the stewardship of pedestrians.

Space

- 2.2 The guidance states that where vehicles and pedestrians share a traffic route, there must be enough separation between them to ensure the safety of pedestrians is not threatened and there is enough space for pedestrians and vehicles to circulate freely.
- 2.3 There must also be enough space for reasonable adjustments to be made for disabled people and the needs of elderly people and children.
- 2.4 Fife's recycling centres are industrial sites, designed for vehicular access only and none of them have the space to effectively separate pedestrians from vehicles in a way that ensures public safety is maintained.

Barriers

- 2.5 Notwithstanding the fact that recycling centres do not have the space to safely separate pedestrians and vehicles, the installation of walkways with guard rails and crossing points would significantly impact traffic routes and access to recycling containers. This would create further risk by compromising traffic flow and operating systems.

Stewarding

- 2.6 The guidance states that pedestrians must report to site offices before accessing recycling centres so that safety policies and procedures can be explained. They must then be stewarded around the site to ensure pedestrian routes are followed and their movement is safely managed.
- 2.7 If the recycling centres of Fife did meet the space and barrier requirements of the safety guidance, they would still need to be appropriately resourced to provide the stewarding function. Across 11 centres with varied shift patterns, it is estimated that 18 additional staff would be required to marshal pedestrians and cyclists at a cost of £540k annually.

3.0 Unintended Consequences

- 3.1 Allowing access for pedestrians and cyclists to recycling centres would inevitably introduce a variety of new situations which would increase public safety risk, such as:
- Pedestrians ignoring walkways, barriers and crossing points, creating increased risk of accidents and potential conflict with stewarding staff.
 - Children and pushchairs being brought onto site with the risk of loss of control in the proximity of moving vehicles.
 - Commercial waste carriers parking nearby and walking in to dispose of waste to avoid incurring charges.
- 3.2 Most Scottish councils do not allow pedestrian and cyclist access to recycling centres because of space restrictions and increased safety risks. Angus, West Lothian, Midlothian and Perth and Kinross Councils most recently responded to an information request confirming that they permit vehicle access only.
- 3.3 Dumfries and Galloway have allowed access and are reporting safety issues arising from the unintended consequences referenced above.

4.0 Small Waste Items – Disposal Provision

- 4.1 Beyond the weekly domestic waste collection service, cyclists and pedestrians can dispose of small waste items at one of the council's 287 recycling points or by using the council's free bulky uplift service, depending on the type of material to be disposed.
- 4.2 Electrical goods can now be disposed of at certain supermarket outlets and will also be lifted by refuse collection staff as part of the domestic waste collection service in 2024.
- 4.3 The Domestic Waste Service, Fife Resource Solutions and Communications Team will work on a communications strategy to inform the public of all the ways in which small waste items can be disposed of safely and responsibly.

5.0 Conclusions

- 5.1 The recycling centres of Fife do not have the space to safely allow access for cyclists and pedestrians, regardless of barrier installations and stewarding provision. On this basis, Fife Resource Solutions must continue with a vehicle-only access policy.

- 5.2 A communication strategy providing information to help the public dispose of small waste items in alternative ways will reduce requests from cyclists and pedestrians to access recycling centres.

Background Papers:

- Local Government (Scotland) Act, 1973
- Waste Industry Health & Safety Forum – ‘Safe Transport at Waste and Recycling Sites.’ WASTE 09. Issue 1. Published 2015.
- Health & Safety Executive – ‘A Guide to Workplace Transport Safety.’ HSG136 (3rd edition) Published 2014.

List of Appendices:

1. CIRECO Recycling Centre Site Assessments
2. Environment and Building Services Pedestrian Safety Assessments

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RECYCLING CENTRE SITE ASSESSMENTS

PEDESTRIAN ACCESS

Site Report

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1. Safety Concerns

Trade Waste

The Recycling Centres have undergone significant alterations to ensure that they are there for the benefit of the local community and prevent unauthorised access to companies disposing of trade waste.

"All waste brought to Fife's HWRCs must be waste generated by your own household activities. Commercial customers and charities will not be granted access, even with a booking." Access Policy Household Waste Recycling Centres

Permitting pedestrian access may lead to trade waste being brought on to site without authorisation.

The sites have automatic number plate recognition (ANPR), electronic access barriers, CCTV and the employees wear personal body cameras as a control measure. These strict measures were implemented to ensure the safety of our employees due to significant incidents where they were threatened by refusing access to suspected trade waste customers. All vehicle access is logged and refusal to site instructions can be imposed on commercial traders.

Should pedestrian access be permitted then this will potentially increase the risk of this reoccurring and demean the effective control measures currently in place.

Verbal Abuse

Interactions with the public have generated verbal abuse concerns being raised to the management by our employees. Over an 11 month period at Cupar alone we have had four situations of verbal abuse. Key incidents relate to our employees being abused for attempting to advise the public on the safe access arrangements of the site.

Permitting Access

The access for pedestrians will need to be controlled and policed by employees. There cannot be a scenario where access is permitted unchecked. The Recycling Centres do not have the employee capacity to monitor a pedestrian access gate and control the site activities.

Should a scenario develop where a pedestrian is refused access under the Access Policy then this may lead to confrontation and potentially threaten the safety of our employees.

There is a risk where pedestrians will not utilize a pedestrian gate should one be installed and instead walk in via the designated vehicle access route. Some sites have shared access for public vehicles and HGV's, should pedestrians attempt to access site via the vehicle routes then the risk of a fatality or life changing injuries is significant.

A control measure for public safety in the access policy indicates that children under the age of 12 are not permitted outside of the vehicles, this is another safety concern should pedestrians be permitted to access the sites.

"Children under the age of 12 and pets are not permitted outside of vehicles at any of our sites."

Access Policy Household Waste Recycling Centres

The access policy also states that wheeled bins are not permitted to be brought on to site. Should pedestrian access become available there may be an increase in the public attempting to bring wheeled bins onto site. This will potentially pose a risk to our employees who may challenge the public under the guidance of the access policy but in turn could lead to verbal abuse or violence towards our employees. The manual handling aspect of emptying a wheeled bin at a recycling centre will also put the public at risk should this be attempted.

Vehicle Parking

Should pedestrian access be permitted then there is an increased risk of members of the public parking on the public roads external to the sites. This will lead to traffic congestion and potentially endanger other road users and pedestrians.

Dalgety Bay, Lochgelly and Cupar are located on roads that HGV's and agricultural vehicles frequently utilise. Members of the public parking outside of these sites would potentially be parking on double yellow lines unauthorised and at their own risk.

Coal Road in Cupar is particularly narrow, should people park outside of site then this significantly reduces the carriageway potentially causing vehicle to cross onto the opposing carriageway to get passed.

Cartmore Industrial Estate where Lochgelly Recycling Centre is located has significant numbers of HGV vehicles accessing daily, any unauthorised parking outside of the site would significantly increase the risk of a traffic incident occurring.

Traffic flow accessing St Andrews would be directly impacted should vehicles be parked outside the site, this may also have a detrimental effect on the residents near the Recycling Centre.

Vehicle Movement

The implementation of pedestrian access routes into the Recycling Centres must take consideration of how the pedestrians can safely walk to any access point. Although the daily operation of the recycling centres has no bearing on the external infrastructure of the sites there may be scenarios where due to the location of an access gate, we will be actively encouraging pedestrians to walk across vehicle access routes.

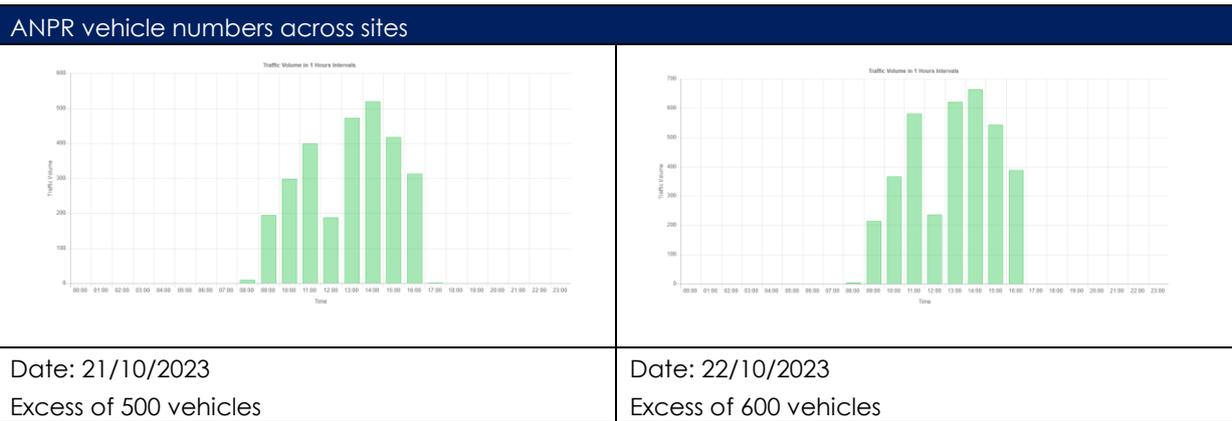
Dalgety Bay and Cupar: potentially walking past three vehicle access points, one of which is designated for HGV's. There may be an instance where the public cross Coal Road or Ridge Way to access the site. There are no designated public crossings near these sites.

Lochgelly: potentially walking past one vehicle access point, shared access with HGV's. Paved areas will mean pedestrians will have to cross the main haul road accessing Cartmore Industrial Estate, there are no pedestrian crossings near the Recycling Centre.

St Andrews has no paved access for pedestrians at this moment in time.

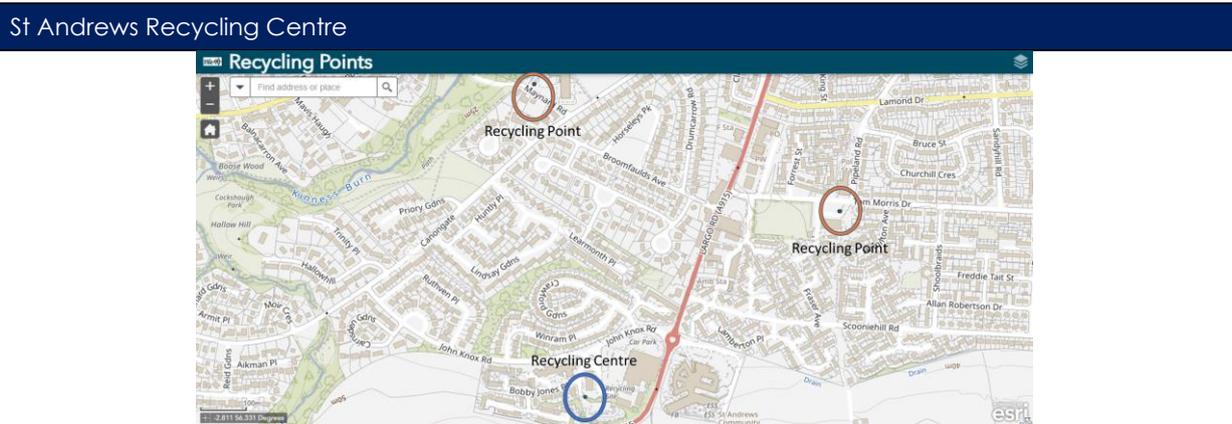
Vehicle numbers accessing the sites is an additional factor when considering the viability for pedestrian access.

Across all the Recycling Centres open on a given day there can be significant volumes of vehicles accessing these locations. Peak times are usually around mid-day, over weekends and during summer months. The data below was taken during October 2023 around the time of the audit.



2. Recycling Points

As part of the assessment, local recycling points operated by Fife Council were identified utilising Fife Councils website. Pedestrians can access recycling points to dispose of waste/recyclable material at these locations.



Cupar Recycling Centre



Dalgety Bay Recycling Centre



Lochgelly Recycling Centre



3. Surrounding Areas

The locations of the recycling centres in relation to residential properties was assessed. In evaluating the feasibility for pedestrian access the expected numbers from residential properties was considered given access to other recycling facilities in the local vicinity.

Permitting pedestrian access to these facilities requires significant remedial works to the site access and the benefit versus the location of these sites in relation to local housing may prove minimal.

St Andrews Recycling Centre has residential housing adjacent to the site. However, with no clear pavement to segregate pedestrians and vehicles there would need to be significant infrastructure changes to provide such an access.

Dalgety Bay and Lochgelly are both situated in industrial estates of the given area with no residential housing in the vicinity. Pedestrian access here may lead to trade waste being brought into site.

Cupar is located on the outskirts of the town centre adjacent to business properties. There are residential properties nearby however there are no designated pedestrian walkways from the properties to safely access the location of the Recycling Centre. Significant infrastructure changes from the Recycling Centre along Coal Road to the junction for Pitscottie Road would need to be considered to facilitate pedestrian access from local residential properties.

4. Additional Factors

Independent Safety Report

Due to concerns raised regarding the safety of Cupar Recycling Centre an independent safety inspection was conducted in February 2023. There were significant findings from the report that resulted in Cupar being temporarily closed till remedial works could be carried out and the site could reopen under stricter controls. In relation to pedestrian access the independent report concluded that public access should not be permitted to Cupar Recycling Centre.

Disabled Access

The suggestion of implementation pedestrian access will need to accommodate disabled access via the same access routes.

Appendix 2

Fife Council

Environment and Building Services

Domestic Waste Recycling Centre Pedestrian Safety Assessments

Mark Brown
Health and Safety Officer
9th November 2023

Environment & Building Services

Pedestrian Access Safety Assessment

CUPAR

Location: Cupar Recycling Centre – Coal Road, Cupar, Fife. KY15 5YQ.
Date: 27/10/23
Assessor(s): Mark Brown (Project Manager – Building Services), Stuart Gillespie (Health & Safety Advisor – Cireco)

1. Purpose

The primary objective of this safety assessment was to comprehensively evaluate the viability of establishing pedestrian access at Cupar Recycling Centre. The focus was on identifying potential risks, assessing current safety measures, and understanding the practicalities involved in creating a secure and efficient pedestrian access and pathway within these facilities.

2. Site Overview

The recycling centre at Coal Road, Cupar, maintains controlled access through two double-gated vehicular entry and exit points. The site operates a one-way system within a confined driving area, with drivers facing limitations in vehicle manoeuvrability. Key safety information is communicated through strategically placed signage and noticeboards, ensuring public awareness of safety protocols and recycling guidelines. Despite spatial constraints, the site manages to include an unloading area, ensuring safe access to skips for the public.

3. Findings

The current layout and vehicle access system operate effectively. However, introducing a pedestrian access gate presents challenges, with pedestrians crossing vehicular access points facing collision risks.

Placing a pedestrian gate near the vehicle entrance is problematic due to the vicinity of the vehicle route within the centre, endangering public safety in a live traffic area. The limited space reduces the possibility of appropriate segregation, giving rise to significant safety concerns for pedestrians entering the recycling centre.

4. Conclusion

Prioritising pedestrian safety is paramount at Cupar Recycling Centre, and maintaining the current vehicular-only access is essential. Implementing changes for pedestrian access like pathways, signage, and additional safety features may compromise the site's overall functionality. The limited space and existing traffic system could inadvertently increase risks to pedestrian safety.

5. Recommendation

Highlighting the principal importance of pedestrian safety, health and safety experts from CIRECO and Fife Council recommend maintaining the current vehicular-only access system at Cupar Recycling Centre.

Environment & Building Services Pedestrian Access Safety Assessment

Dalgety Bay

Location: Dalgety Bay Recycling Centre - Ridge Way, Dalgety Bay, Fife. KY11 9JD
Date: 26/10/23
Assessor(s): Mark Brown (Project Manager – Building Services), Stuart Gillespie (Health & Safety Advisor – Cireco)

1. Purpose

The primary objective of this safety assessment was to comprehensively evaluate the viability of establishing pedestrian access at Dalgety Bay Recycling centre. The focus was on identifying potential risks, assessing current safety measures, and understanding the practicalities involved in creating a secure and efficient pedestrian access and pathway within these facilities.

2. Site Overview

Designed for vehicular access, the centre features safety barriers, three access/egress gates, and a one-way system. Unloading areas, pedestrian walkways at skip areas, and safety signage contribute to a well-structured layout.

3. Findings

A potential site for pedestrian access near the HGV and exit gates exists at the recycling centre. However, using this space would require individuals to cross multiple access points, significantly raising the risk of collisions with vehicles.

In addition to safety concerns, the installation of a pedestrian access gate involves significant costs for centre layout adjustments.

4. Conclusion

Introducing a pedestrian access gate at Dalgety Bay Recycling Centre requires addressing challenges, including potential collision risks and significant costs associated with site modifications.

The impracticalities of implementing such changes, coupled with the inherent safety concerns, underline why the identified risks to public safety and the substantial work involved to make the centre safety compliant should be considered when deciding on pedestrian access.

5. Recommendation

The joint health and safety assessment carried out by professionals from CIRECO and Fife Council recommends maintaining the current vehicular-only access system at the recycling centre, prioritising public safety, and operational efficiency.

Environment & Building Services / CIRECO

Pedestrian Access Safety Assessment

Lochgelly

Location: Lochgelly Recycling Centre, Cartmore Industrial Estate, Lochgelly, Fife. KY16 8PJ
Date: 26/10/23
Assessor(s): Mark Brown (Project Manager – Building Services), Stuart Gillespie (Health & Safety Advisor – Cireco)

1. Purpose

The primary objective of this safety assessment was to comprehensively evaluate the viability of establishing pedestrian access at Lochgelly recycling centre. The focus was on identifying potential risks, assessing current safety measures, and understanding the practicalities involved in creating a secure and efficient pedestrian access and pathway within these facilities.

2. Site Overview

The recycling centre is strategically designed for vehicular access, featuring a double-gated entry/exit point with a barrier security system, a one-way system, staff facilities, and designated pedestrian walkways and crossing points at skip areas. Clear safety signage and noticeboards help to create a well-structured environment.

3. Findings

While the potential for a pedestrian access exists next to the vehicle gates, the nature of vehicle traffic in the industrial estate poses risks to pedestrian safety, given the high volume of cars, vans, and heavy goods vehicles without designated crossing points or adequate safety measures.

Introducing a pedestrian access gate in such conditions not only raises safety concerns but also requires additional expenses for modifying the centre layout and implementing safety controls, adding complexity to the feasibility of this option.

4. Conclusion

The identified hazards in the safety assessment reveals that despite the potential for pedestrian access next to the vehicle gates at Lochgelly recycling centre, the industrial estate's high volume of vehicle traffic poses significant risks to pedestrian safety.

Achieving safety compliance and ensuring pedestrian protection would require extensive safety measures, including the implementation of designated crossing points and necessary modifications to the centre layout.

5. Recommendation

The joint health and safety assessment carried out by professionals from CIRECO and Fife Council recommends that pedestrian access is not provided to Lochgelly Recycling Centre based on the identified safety concerns and the substantial expenses associated with modifying the centre layout.

Environment & Building Services / CIRECO

Pedestrian Access Safety Assessment

St. Andrews

Location: St Andrews Recycling Centre - Argyll Business Park, Largo Road, St Andrews, Fife. KY16 8PJ
Date: 27/10/23
Assessor(s): Mark Brown (Project Manager – Building Services), Stuart Gillespie (Health & Safety Advisor – Cireco)

1. Purpose

The primary objective of this safety assessment was to comprehensively evaluate the viability of establishing pedestrian access at St Andrews recycling centre. The focus was on identifying potential risks, assessing current safety measures, and understanding the practicalities involved in creating a secure and efficient pedestrian access and pathway within these facilities.

2. Site Overview

The recycling centre at Largo Road, St Andrews, prioritises vehicular access through double gates, maintaining separation from staff car parking. A well-structured one-way system guides vehicle flow, while pedestrian walkways at skip areas facilitate safe movement within the facility. Designated areas for service vehicles minimise collision risks. Clear signage promotes safety and public awareness, creating a structured and visitor-friendly environment.

3. Findings

The recycling centre is well laid out and vehicle access systems are safe and effective.

The approach road has no pavement, and this currently prevents pedestrian access to the recycling centre. The road is narrow and sloped and this presents construction challenges in the provision of a safe and level walkway. Modifying the road to accommodate a pavement would be an expensive undertaking.

The road width would be reduced which would impact vehicle flow and create a collision hazard.

Introducing additional walkways within the centre would also reduce the road width and increase the risk of collisions for vehicles and pedestrians.

4. Conclusion

It is evident that without significant investment in altering the approach road to provide a pavement, pedestrians are at considerable risk of being hit by vehicles.

Altering the limited space within the centre to accommodate a pedestrian gate and additional walkways would increase traffic congestion and the risk of vehicle collisions.

5. Recommendation

The joint health and safety assessment carried out by professionals from CIRECO and Fife Council recommends that pedestrian access is not provided to St. Andrews Recycling Centre.