

Birmingham City Council

Report to Cabinet

Date: 19th March 2024



Subject: **SCHOOLS' CAPITAL PROGRAMME – SCHOOL CONDITION ALLOCATION, BASIC NEED ALLOCATION 2024-25+ FUTURE YEARS**

Report of: **Sue M Harrison, Strategic Director for Children & Families**

Relevant Cabinet Member: **Cllr Karen McCarthy- Children Young People and Families**

Relevant O &S Chair(s): **Cllr Kerry Jenkins– Education & Children's Social Care**

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Are specific wards affected?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No – All wards affected
If yes, name(s) of ward(s):		
Is this a key decision?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, add Forward Plan Reference: 012466/2024		
Is the decision eligible for call-in?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Does the report contain confidential or exempt information?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If relevant, provide exempt information paragraph number or reason if confidential:		

1 Executive Summary

- 1.1 To update on progress of the Schools' Basic Need (BN) Capital Programme and Schools' Condition Allocation (SCA) Programme.
- 1.2 To seek approval for the Outline Business Case (OBC) for the Schools' Condition Programme 2024/25 plus 'Future Years'.
- 1.3 To seek approval for the Outline Business Case (OBC) for the Schools' Basic Need Programme (which includes the High Needs Provision Allocation for SEND places) 2024/25 plus 'Future Years'.
- 1.4 To note that the programme is funded via the dedicated Dfe grants allocated for Schools Condition, Basic Need, High Needs Provision and S106 income.

2 Recommendations

That Cabinet; -

- 2.1 Notes the progress on the delivery of the Schools' Condition Programme and Schools' Basic Need Capital Programme, as outlined in this report.
- 2.2 Approves the OBC for the Schools' Condition (SCA) Programme (**Appendix 2**) and the anticipated allocation of up to £14.000m for the delivery of this programme.
- 2.3 Approves the OBC for the Schools' Basic Need (BN) Programme (which includes the High Needs Provision Allocation for SEND places) (**Appendix 3**) for the delivery of this programme.
- 2.4 Approves the procurement strategy for the Basic Need and Schools' Condition Allocation schemes above the procurement governance threshold of £0.250m (ex VAT) and delegates the award of contract to the Cabinet Member for Children, Young People and Families in consultation with the Strategic Director for Children and Families.
- 2.5 Approves the allocation of £3.000m of Basic Need Grant for the development of Feasibility Studies, to include undertaking surveys, detailed design and planning, to inform Full Business Cases (FBC) in order to deliver the Basic Need and High Needs Provision Programme.
- 2.6 Notes that in dual funded projects, approval will only be sought for the Council's contribution to the cost of the project.
- 2.7 Authorises the City Solicitor and Monitoring Officer to negotiate, execute, seal and complete all necessary documents to give effect to the above recommendations.

3 Background

- 3.1 The Local Authority has a statutory duty to secure sufficient school places to meet the needs of the population in Birmingham.
- 3.2 It remains a challenge to predict with certainty where and when places will be needed. The current priority is to create sufficient secondary mainstream and special educational need places as the growing primary cohorts are now entering secondary school. The supply of school places continues to increase with new places provided by Free Schools, additional places provided by schools that are their own admissions authorities and additional places provided through the Local Authority's Basic Need programme.
- 3.3 Since 2009 over 23,900 additional mainstream school places have been created in Birmingham. These include permanent and temporary expansions as well as bulges to meet in-year growth and includes new schools. The last School Capacity (SCAP) return to the DfE was submitted at the end of July 2023 and is pending signoff. This return provides a clear indication of our requirements for 2023/24 to 2029/30, reflecting in particular the requirement for additional secondary places to meet demand. The secondary place demand was outlined originally in the School Place Planning Requirements 2018/19 to 2024/25 document published in December 2018 as a result of higher primary cohorts, continued growth and new housing developments. Since that publication, updated annual forecasts as a result of changes to planning areas, migration in the region and local housing developments has prioritised target areas for additional places in both the north of the city (Erdington and Sutton Coldfield), as well as southeast Birmingham (Hall Green and Selly Oak). The latest mainstream place planning update was shared at ECSLT in November 2023.
- 3.4 Since 2015 over 670 additional special educational needs (SEND) places across special schools, as well as over 150 additional places across new or expanded resource bases, have been created. The first SEND SCAP return to the DfE was submitted at the end of July 2023 and is pending signoff. Work is ongoing to meet current and forecast demand to meet the needs of our City with a SEND sufficiency publication expected in April 2024.
- 3.5 Our strategy in Birmingham to meet Basic Need has 4 key strands:
- Make optimum use of existing space in buildings and sites to provide sufficient, suitable, high quality additional places where needed.
 - Work with all schools, academies, and new schools to meet Basic Need through co-ordinated expansion plans.
 - Allocate annual Basic Need Capital investment effectively and efficiently to areas where basic need requirements can only be met through either re-modelling, refurbishment or new build projects.
 - Identify alternative funding sources and models to deliver requirements including S106, school contributions, bidding opportunities etc.

- 3.6 The Health and Safety at Work Act 1974 and School Standards and Framework Act 1998 Section 22 requires the Local Authority in its capacity as the employer to provide a safe place of work and to ensure that the maintained school estate is not subject to decay which could put the health and safety of pupils at risk.
- 3.7 Since the introduction of the Academies Act 2010, the education landscape has been changing as some schools choose to change their status from Local Authority maintained to Academy. While the Council's maintained schools' portfolio has been reduced as a result of the Academies programme, the Council remains the single largest Accountable Body and Landlord for education in Birmingham and receives an annual grant funding to fulfil its statutory duties in relation to the schools' estate.
- 3.8 The School Condition Programme, which sits within the Schools' Capital Programme 2024-25, addresses these issues through annual planned maintenance projects and reactive emergency repairs to LA maintained schools. The SCA grant that the Council receives is not sufficient to meet the substantial backlog maintenance requirements across our maintained schools' estate. Therefore, prioritisation of maintenance projects, based upon the risk resulting in school closure, is necessary, along with leveraging of joint funding with schools wherever possible. In 2023/24 we are, so far, delivering 79 planned maintenance, 24 approved dual funded projects and forecasting a spend of £0.550m on reactive maintenance as of 30th November 2023.
- 3.9 The DfE approved 33 special free school applications nationally in the first stage of SEND Free School Wave 3. This a central free school programme with schools delivered and funded centrally by the DfE. Birmingham was successful in securing 2 schools during this process:
- School 1: 4-19, ASC, 400 places
 - School 2: 14-19, SEMH/ASC, 120 places

The proposed site for School 1 is Wareham Road, Frankley. The proposed site for School 2 is the Burford Road Unattached School Playing Field in Kingstanding. These proposed sites have been assessed for feasibility. Interviews with prospective Trusts have recently taken place. Further consultation and decision making will be shared in due course.

4 Options considered and Recommended Proposal

- 4.1 The option of not approving the OBC's would mean the Local Authority would fail in meetings in statutory duty in providing sufficient school places and maintaining them.
- 4.2 The option of reducing the maintenance programme to emergency repairs only would lead to increased risk of school closure from asset failure and would reduce the value for money that can be secured through effective planned maintenance.

- 4.3 It is therefore proposed that the OBC's for Schools' Condition Allocation, Basic Need Allocation and High Needs Provision Allocation are approved.

5 Consultation

- 5.1 Forecasts have been refreshed to update the latest information on births, cohort growth (including migration and cross-border movement) and housing developments. These were submitted to DfE during July 2023. They reflect notable changes in migration trends, particularly including the impact of pupil numbers arriving from resettlement schemes within the region. Information on the changes and implications to schools has been shared through Primary and Secondary School Forums, as well as via consortia or network meetings, meetings with schools, trusts and governing bodies. In some circumstances, schools have been targeted and consulted directly to consider additional places. Schools are reminded annually of their duty to notify the Council of and consult on any changes to their admission arrangements. Ongoing consultation will continue to take place as required with key external stakeholders in all projects within the Schools' Capital Programme.

6 Risk Management

- 6.1 Limiting any school condition spend to emergency repairs only will result in backlog maintenance issues escalating across the estate leading to serious health and safety risks for staff and pupils in school.
- 6.1.1 To mitigate this risk, we will prioritise projects that meet the following criteria (as set out in **Appendix 2**):
- Condition issues that are most likely to lead to school closure.
 - Condition issues that pose Health and Safety risks.
 - Condition issues that must be addressed in order to fulfil statutory compliance obligations.
- 6.2 The risk of projects running over time and over budget will be mitigated by ensuring appropriate programme management of the contracts is in place so that progress is monitored in a timely manner against the 2024/25 programme. This will enable any concerns to be picked up at the earliest opportunity and resolved so that the programme stays on track. Where there is a risk, acceleration of projects may be introduced to ensure projects are delivered on time resulting in sufficient places for all children of Birmingham. Where costs increase a value engineering exercise will be undertaken to ensure that the costs do not exceed the agreed amount or available budget.
- 6.3 To support the setting and approval for realistic budgets and to mitigate overspends for projects, the Council's technical advisor, Acivico Ltd will produce a cost plan comprising of a pre-tender estimate for the works, survey costs and all professional fees. The pre-tender estimate will be timely and reflective of current market conditions based on the design and

specification for the works required and include a contingency proportionate to the complexity and level of risk of a project. A robust evaluation of pricing for tenders will be undertaken by Acivico Ltd with demonstration of value for money. Progress for all projects will be monitored and managed at periodic meetings led by EDI with Acivico Ltd including identifying and mitigating risks.

7 Compliance Issues:

7.1 How are the recommended decisions consistent with the City Council's priorities, plans and strategies?

7.1.1 The Schools' Capital Programme is necessary for the Council to meet its statutory duty to secure sufficient early years, primary, secondary and special education places in safe and compliant school buildings and early years' settings. City-wide, the School Condition programmes will support the Council Priorities.

7.1.2 The spending priorities proposed are in accordance with the Schools' Capital Programme 2024-25 and the Council's Vision and Forward Plan priorities for Children, particularly 'A great place to grow up in by providing an environment where children have the best start in life and are able to realise their full potential through great education'. The provision of additional school places is also beneficial to the safeguarding of children.

7.1.3 Birmingham Business Charter for Social Responsibility

Compliance with the BBC4SR is a mandatory requirement that will form part of the conditions of any contract in accordance with the social value policy. Contracts in tier 1 (below the PCR 15 threshold) are encouraged to complete at least 1 project from the Match My Project portal for the duration of the contract. Any tier 2 contracts (above the PCR15 threshold) require the full consideration of social value and application of the BBC4SR including the delivery of at least 1 project which is relevant to the social value outcomes sought through the contract and where possible from the Match My Project portal, per year. Tenderers will be required to submit an action plan with their tender that will be evaluated in accordance with the CWM2 framework protocol and the action plan of the successful tenderer will be implemented and monitored during the contract period.

As a condition of any grant issued, each school will be required to be certified to the BBC4SR and produce an action plan with commitments that are relevant and proportionate.

7.2 Legal Implications

7.2.1 This report facilitates the discharge of the Local Authority's duties and the overall responsibility for the capital strategy for schools, under section 14 of the Education Act 1996. The Local Authority has a general landlord duty for all buildings which it lets to academies, and a duty under section 22 of the School Standards and Framework Act 1998 to maintain its schools, this includes expenses relating to premises.

7.2.2 Under Section 1 of the Localism Act 2011, the Council has the power to enter into the arrangements set out in this report, which are within the remit and limits of the general power of competence Section 2 and 4 of the Localism Act 2011.

7.3 Financial Implications

7.3.1 The Schools' Capital programme is funded from the Department for Education's School Condition Allocation (SCA), Basic Need (BN), High Needs Provision Capital Allocation (HNPCA) and other resources as indicated in **Appendix 1**.

7.3.2 Our Annual SCAP return for 2020 resulted in a 'Nil' basic need allocation for the year 2021/22, due to a change in the application of abatement. This decision by the DfE meant that we could not meet the demand for 7 FE's for the year 2021/22 which equates to 1,050 places. In order to meet this demand fully, the Directorate put in a successful bid for Corporate Resources to the value of £19.656m. As part of the Council's Financial Recovery Plan, it was agreed that £16.700m of the remaining balance of Corporate Resources could be removed generating a revenue saving of £0.710m per annum.

7.3.3 The current profile to meet our statutory duty is contained within the DfE allocated grants to ensure sufficient places are available.

7.3.4 The DfE has written to all LAs in November 2023 to advise that the timing of the next Spending Review has not yet been confirmed and no further Basic Need allocations will be announced until a new settlement has been agreed. The next allocation expected is for 2026-27 allocations (for places needed in 2027). In the meantime, we are carrying out an exercise to estimate expected allocations.

7.3.5 Consequential revenue costs arising, including the need for additional staffing and on-going day to day repair and maintenance of the asset will be the responsibility of the school and funded from the school's delegated budget.

7.3.6 **Appendix 1** provides the summary of spend requirements profiled for 2024/25 + Future Years.

7.3.7 There is no request for any new resources, but approval to spend existing allocated resources as outlined in **Appendix 1**. However, it should be recognised that additional Corporate Resources will be required in the future (should DfE allocations not be sufficient) in order to meet statutory requirements to provide additional pupil places (including for pupils with Special Educational Needs and Disabilities (SEND)) and any statutory expenditure associated with the maintenance of schools to ensure compliance with Health and Safety regulations. In order to mitigate the requirement for Corporate Resources, we will continue to work with the school estate to create additional capacity by bringing into use underutilised space and managing the estate within the budget

allocations received. Disposal of school sites that are no longer required for education will generate further capital receipts via s77 approvals and will be used to manage the operational estate.

- 7.3.8 All expenditure approved via the Schools Capital Programme Report 2024-25, will be submitted to the S151 Officer to obtain bulk approval in line with the Spend Control Process in place. Individual Scheme reports will then be presented to the Directorate Spend Control Board for approval. These will be presented back to S151 Officer in line with the bulk approval agreement.

School Condition Resources	Projected Profile Spend
	2024/25 £m
School Condition	14.000
Totals	14.000

Additional Places Resources	Projected Profile Spend
	2024/25 £m
Basic Need	9.191
High Needs Provision	18.885
S106 Funding	2.499
Totals	30.575

7.4 Procurement Implications (if required)

- 7.4.1 The Council's primary procurement route for works of this nature is to use Acivico Ltd's Constructing West Midlands 2 Framework Agreement (or any replacement) either undertaking a further competition exercise (this being the default route) or a direct award, subject to the complexities and timescales of each project in order to ensure that the Council's statutory and legislative duties are met. Where direct award is the route, value for money will be demonstrated by Acivico Ltd to the Council and reported in any award report.
- 7.4.2 Where a grant is issued to a school for works, the responsibility for the procurement and award of contract is with the school under their governance arrangements. The Conditions of Grant Agreement (COGA) will include the requirement to demonstrate to the Council value for money, compliance to any legislation including the Public Contracts Regulations 2015 from the issue of the payment.

7.4.3 The COGA will require the repayment to the Council of any underspend and that the contract is managed within the grant allocation as no additional funding will be issued.

7.5 Human Resources Implications (if required)

7.5.1 N/A

7.6 Public Sector Equality Duty

7.6.1 A Full Equality Analysis (EQA650) was reviewed and updated in November 2023. Having considered the Public Sector Equality Duty in light of the recommendations in this report, it has been decided that another Full Equality Analysis is not required, and it thought that that the decisions taken in this report will support the Council's performance of the duty.

7.6.2 The outcomes from the Equality Analysis demonstrate that proposed capital developments support positive outcomes for children, young people, their families and carers. No negative impact on people with Protected Characteristics was identified. It was concluded that sufficiency of educational places and opportunities for all children and young people contributes to providing positive life chances and supports a positive approach to Safeguarding in Birmingham actively reducing the number of children and young people out of school helps to mitigate risk to their safety and wellbeing. The contracts include conditions that require appropriate safeguarding measures are in place for delivery of the works.

7.7 Environmental and Sustainability Implications

7.7.1 Not required - Financial reports with no sustainability/environmental implications.

8 Appendices

8.1 List of Appendices accompanying this Report (if any):

1. Requirements and financial model
2. OBC SCA
3. OBC BN

9 Background Documents

9.1 None

Appendix 1:

School Condition Programme –School Condition and Basic Need Allocation - 2024 -25+ FUTURE YEARS

Requirements and Financial Model.

Contents

- 1. Financial Modelling Approach**
- 2. School Condition Funding Allocations**
- 3. Basic Need Funding Allocation**
- 4. S106 Income**
- 5. School Condition Programme future Requirements**
- 6. Basic Need Programme future requirements**
- 7. Other Programme Updates**

1. Financial Modelling Approach

In order to deliver the Schools Capital Programme within available resource the following approach is taken:

Step 1: Requirements

Define future requirements for the schools' capital programme:

- i) priority maintenance requirements to prevent school closure for 2024– 25 +
- ii) additional places required in special and mainstream schools for 2024 – 25 + future years

Step 2: Resources available

Set out the confirmed funding for the delivery of the capital programme and identify how many of the requirements can be met from the available capital funding

Step 3: Affordability measures

Quantify the requirements that must be found either through:

- i) maximising use of existing space
- ii) identifying alternative funding sources (Section 106, school contributions, bidding opportunities, LCVAP, Community Infrastructure Levy, future Basic Need / School Condition Allocations, Capital Receipts, Free School Applications, Corporate Resources etc.)

The number of school places required may change during the development of options for the School Basic Need Capital programme as a result of Free Schools and Academy expansions and as a result of changes to net migration.

2. School Condition Funding Allocations

The School Condition funding allocations announced to date are:

	Assumed School condition Allocations			
2021/22	2022/23	2023/ 24	Total	
£m	£m	£m	£m	
0.966*	12.701**	12.458***	26.125	

* Balance from 21/22 allocation

** Balance from 22/23 allocation

*** Dfe confirmed allocation for 23/24

The sections below set out how we intend to deliver the requirements of each stage within the resource available. A degree of re-profiling of the funding available will need to be carried out as the development of preferred options clarifies the cost of each individual solution.

This is part of the annual update to Cabinet and covers: -

- i) Changes to requirements based on demographic analysis and updates regarding Academy and Free School expansions
- ii) Update on funding including any new funding streams or capital allocations
- iii) Modelling of requirements for the current and next stages of the capital programme
- iv) Update on solutions developed and any re-profiling of capital requirements within resources available
- v) Update on delivery against capital programme output

Basic Need Funding Allocation

The Basic Need funding allocations announced to date are:

2022/23	2023/24	2024/25	2025/26	Total
£m	£m	£m	£m	£m
9.191*	0.000	0.000	26.182**	35.373

*Balance of 2022/23 allocation

**Confirmed Dfe Allocation 2025/26

High Needs Provision Fund Allocations

The High Needs Provision capital allocation is to support the creation of new High Needs places or the improvement of existing provision (for pupils with Special Educational Needs and Disabilities (SEND) or requiring Alternative Provision (AP)).

Confirmed High Needs Provision Fund Allocations		
2022/23	2023/24	TOTAL
£m	£m	£m
5.710*	13.175**	18.885

*Balance of 2022/23 allocation.

** Confirmed Dfe allocation

3. Section 106 Funding

The service currently holds a balance of £4.598m of Section 106 income which can be used for Capital works in accordance with the conditions attached. Where appropriate, we will require a deed of variation to fully utilise the funding.

4. Corporate Resources

Our Annual SCAP return for 2020 resulted in a 'Nil' basic need allocation for the year 2021/22, due to a change in the application of abatement. This decision by the Dfe meant that we could not meet the demand for 7 FE's for the year 2021/22 which equates to 1,050 places. In order to meet this demand fully, the Directorate put in a successful bid for Corporate Resources to the value of £19.656m.

As part of the Council's Financial Recovery Plan, it was agreed that £16.700m of the remaining balance of Corporate Resources could be removed generating a revenue saving of £0.710m per annum.

5. School Condition Programme Future Requirements

School Condition Resources	Allocation announced to date	Projected Profile Spend		
		2024/25	2025/26	2026/27
	£m	£m	£m	£m
School Condition	26.125	14.000	12.125	
Totals	26.125	14.000	12.125	

6. Basic Need Programme Future Requirements

Additional Places Resources	Allocation announced to date £m	Projected Profile Spend		
		2024/25 £m	2025/26 £m	2026/27 £m
Basic Need	35.373	9.191	26.182	
High Needs Provision	18.885	18.885		
S106 Funding	4.598	2.499	1.950	0.149
Totals	58.856	30.575	28.132	0.149

OUTLINE BUSINESS CASE (OBC)

A. GENERAL INFORMATION

A1. General

Project Title <i>(as per Voyager)</i>	School Condition Programme –School Condition Allocation 2024-25+ FUTURE YEARS		
Oracle code	LV0013		
Portfolio /Committee	Education & Early Years	Directorate	Children & Families
Approved by Project Sponsor	Zahid Mahmood, Acting Head of Service, Education Infrastructure	Approved by Finance Business Partner	Clare Sandland Business Partner Children & Families

A2. Project Description

Department for Education (DfE) School Condition Allocation grant funding is awarded to the Local Authority (LA) for the purposes of addressing maintenance issues across the LA maintained school's estate only. Voluntary Aided schools receive their maintenance funding through a different grant funding scheme and Academies are funded directly by the Education Funding Agency (EFA).

The Local Authority is expected receive an annual School Condition Allocation (SCA) of £12.458m from DfE for the year 2024/25. This grant is not ring fenced or time bound, however we are required to verify this funding has been spent on capital projects through the Section 151 officer's return.

There will also be a continued emphasis on maximising schools' contributions to planned and emergency capital maintenance works, particularly where schools are holding surplus balances or where the ongoing burden on the school of 'patch and repair' can be reduced by a jointly funded project to address the root cause of the condition issue.

The key work streams in the School Condition Programme, described in more detail in the project deliverables can be summarised as:

1. Centrally Managed Planned School Condition Programme (condition issues most likely to lead to school closure) - £12.000m
2. Emergency unscheduled repairs to prevent school closures – £1.000m
3. Dual Funding initiative – £1.000m

B. STRATEGIC CASE

This sets out the case for change and the project's fit to the Council Plan objectives

B1. Project objectives and outcomes

The case for change including the contribution to Council Plan objectives and outcomes

Projects have been developed and delivered to maximise alignment with local priorities, in particular to impact on developing skills, employment opportunities, public health and community cohesion. Works will contribute to the Council Business Plan and Budget 2024+, particularly 'A Prosperous City', by ensuring meets the Council Plan objectives by ensuring that

children and young people have a suitable and safe space to learn, grow and develop in so their full potential can be achieved.

Compliance with the Birmingham Business Charter for Social Responsibility (BBC4SR) is a mandatory requirement that will form part of the conditions of any contract in accordance with the social value policy. Contracts in tier 1 (below the PCR 15 threshold) are encouraged to complete at least 1 project from the Match My Project portal for the duration of the contract. Any tier 2 contracts (above the PCR15 threshold) require the full consideration of social value and application of the BBC4SR including the delivery of at least 1 project which is relevant to the social value outcomes sought through the contract and where possible from the Match My Project portal, per year. Tenderers will be required to submit an action plan with their tender that will be evaluated in accordance with the CWM2 framework protocol and the action plan of the successful tenderer will be implemented and monitored during the contract period.

Where a grant is issued, the Conditions of Grant Aid will require the school to be certified to the BBC4SR and provide commitments relevant and proportionate to the value of any payment.

B2. Project Deliverables

These are the outputs from the project eg a new building with xm2 of internal space, xm of new road, etc

Work stream 1: Centrally Managed Planned School Condition Programme – £12.000m (based on funds remaining after allocation to work streams 2 & 3). Elements leading to school closure such as boilers, windows and roof replacement will be prioritised.

This will be a planned programme of maintenance projects addressing priority condition need centrally managed by Edl.

Priority condition need across the education estate outweighs the funding available to address the maintenance issues. Projects will therefore be prioritised where the condition need has the greatest risk of leading to school closure; this translates into projects which for the most part will address roofing, heating, electrical, windows and structural conditions. There will be an emphasis on influencing schools to allocate their devolved formula capital and school surplus budgets to support addressing priority condition need in order to meet the affordability gap on maintaining the schools' estate.

Works will be prioritised according to severity and likelihood of school closure / health and safety risk. This will be evaluated by the Edl team with technical support from Acivico Ltd.

Where necessary, projects will be developed to Full Business Case stage. We are currently aware of the following projects that will be higher than £0.179m in 2024/25

School	Works	Forecasted spend 2024/25 £m
Benson JI	Roof Replacement	0.231
Benson JI	Boiler Replacement	0.422
CoB's Ashborne Centre	Roof Replacement	0.728
New Oscott JI	Roof Replacement	0.789
New Oscott JI	Asbestos Removal	0.658

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Paget JI	Boiler Replacement	0.199
Grove Jnr	Boiler Replacement	0.218
Highters Heath JI	Roof Replacement	0.199
Hollyfield JI	Roof Replacement	0.310
Mapledene JI	Windows Replacement	0.315

Programme:

Where possible, all major works will be planned to be carried out during school holidays (half terms and end of terms). It is anticipated that projects identified for the 2023/24 programme will in large part be completed by March 2024. However, in some cases, works may be delayed every effort will be made for these to be completed as soon as practically possible.

Work stream 2: Emergency Unscheduled Repairs – £1.000m (based on previous years' expenditure and projected forecast based on condition of the estate and inclement weather conditions)

Annually, Acivico responds to a significant number of incidents that are unscheduled emergency repairs, for example the extreme weather conditions leading to flooding, frozen pipes, boiler failure etc. leading to school closures due to major asset failure.

Due to extreme weather conditions in the recent years, it is becoming increasingly difficult to estimate the volume of unscheduled repairs that will be required. In case there are insufficient funds to cover the unscheduled repairs, the planned maintenance programme will be adjusted to cover the shortfall. Likewise, any emergency monies not allocated by March 2024 will be re-directed to priority condition need identified on a reserve list of condition projects to be carried out in 2024/25.

Work stream 3: Dual Funded Programme – £1.000m (based on applications received in previous years with additional sum for managing asbestos in schools – funding allocation on first come first served basis)

Dual Funded schemes can be BCC or School led. In case of School led, Schools that demonstrate experience, capability and capacity in delivering their own capital schemes and agree to part fund the works will be able to submit a Dual Funding application. The available funding will be allocated on a priority basis ensuring elements such as safeguarding, compliance and health & Safety are prioritised for funding. In case of BCC led, the agreed level of school contribution will be charged out to the school.

The criteria for qualifying projects is aligned with centrally managed projects and will focus on issues which are likely to lead to school closure if not addressed. The dual funding programme will also consider projects which will address major health and safety, safeguarding or compliance related issues with a particular focus on managing asbestos in line with schools' Asbestos Management Plans (AMPs).

All projects will be further developed to Full Business Case stage. The decision maker will be dependent upon value. As the majority of these works are below £0.200m they will be approved under Head of Service or Chief Officer delegation.

Schools will be required to sign up Conditions of Grant Aid (CoGA).

<p><u>Future Governance and reporting back</u></p> <p>An annual report will be presented to Cabinet updating on progress / delivery / outcomes and to seek approval for future spend.</p>	
<p>B3. Project Benefits</p> <p><i>These are the social benefits and outcomes from the project, eg additional school places or economic benefits.</i></p>	
Measure	Outline Impact
<p><i>List at least one measure associated with each of the objectives and outcomes in B1 above</i></p>	
<p>i) reduction in school closures linked to asset failure</p>	<ul style="list-style-type: none"> ▪ address backlog maintenance and condition issues across the Local Authority maintained school's estate.
<p>ii) minimal disruption to educational continuity by scheduling works during school holidays</p>	<ul style="list-style-type: none"> ▪ enable the Council to respond to unscheduled building emergencies to minimise health and safety risks and prevent school closures.
<p>B4. Property implications</p> <p><i>Describe any implications for Council properties and for the Council's property strategies</i></p> <p>To deliver the statutory duty, by virtue of section 542 of the Education Act 1996 and the School Premises (England) Regulations 2012, to ensure that maintained school buildings are maintained to a standard such that, so far as is reasonably practicable, the health, safety and welfare of pupils are ensured.</p>	
<p>C. ECONOMIC CASE - OPTIONS APPRAISAL</p> <p><i>This sets out the options that have been considered to determine the best value for money in achieving the Council's priorities</i></p>	
<p>C1. Options reviewed</p> <p><i>A full description and review of each option is in Section G1</i></p>	
<p>Option 1 - Limiting any school condition spend to emergency repairs only and delivering no planned priority condition need maintenance programme</p> <p>Option 2 - Take action as set out in this report and its supporting project schedules</p>	
<p>C2. Summary of Options Appraisal – Price/Quality Matrix</p>	
<p> </p>	

APPENDIX 2

Ratings from 1 (lowest) – 10 (highest)	Options		Weigh ting	Weighted Score	
	1	2		1	2
Criteria					
Total Capital Cost	10	8	25%	250	200
Quality Evaluation Criteria					
1) Programme allows maximum use of school holidays to minimise disruption	1	10	20%	20	200
2) Effectiveness: allows the council to maintain its schools and address the highest priority conditions needs	1	9	25%	25	225
3) Functionality: it meets service delivery and user requirements	1	10	10%	10	100
4) Achievable: compliance with requirement to maintain schools and provide a safe learning environment	1	10	20%	20	200
Total				325	925

C3. Option recommended, with reasons

Which option is recommended and the key reasons for this decision.

[Option 2 - this will enable the LA to maximise the impact of the School Condition Programme in improving outcomes for young people and through maintaining our schools and provide a safe learning environment for our pupils and staff

C4. Risks and Issues of the preferred option

None identified

C5. Other impacts of the preferred option

Describe other significant impacts, both positive and negative

- Meeting the council's statutory duty to maintain its schools
- Keeping schools open
- Reducing health and safety risks and potential injuries
- Meeting statutory compliance requirements
- Addressing key condition priorities i.e. essential building repair and maintenance
- Provides a balanced approach to planned and emergency repairs
- Reducing the number of unplanned / emergency repair requirements

D. COMMERCIAL CASE

This considers whether realistic and commercial arrangements for the project can be made

D1. Partnership, Joint venture and accountable body working

Describe how the project will be controlled, managed and delivered if using these arrangements

N/A

D2. Procurement implications:*What is the proposed procurement strategy and route? Which Framework, or OJEU?*

- 1.1.1 The Council's primary procurement route for works of this nature is to use Acivico Ltd's Constructing West Midlands 2 Framework Agreement either undertaking a further competition exercise (this being the default route) or a direct award, subject to the complexities and timescales of each project in order to ensure that the Council's statutory duties are met. Where direct award is the route, value for money will be demonstrated by Acivico Ltd to the Council and reported in any award report.
- 1.1.2 Works undertaken under £0.025m will be undertaken by Acivico Ltd under the Council's Design, Construction and Facilities Management
- 1.1.3 Where a grant is issued to a school for the works, the responsibility for the procurement and award of contract is with the school under their governance arrangements. The Conditions of Grant Agreement will include the requirement to demonstrate to the Council value for money and compliance to any legislation including the Public Contracts Regulations 2015 from the issue of the payment.

E. FINANCIAL CASE			
<i>This sets out the cost and affordability of the project</i>			
E1. Financial implications and funding			
Capital Costs and Funding	Project Code	Financial Year 2024/25	Totals
	LV0013		
<u>Expenditure:</u>		£m	£m
Planned Priority School Condition Projects		12.000	12.000
Unscheduled emergency repairs / school closure prevention		1.000	1.000
Dual Funding		1.000	1.000
Totals		14.000	14.000
<u>Funding:</u>			
Department for Education (DfE) School Condition Allocation		14.000	14.000
TOTAL		14.000	14.000

E2. Evaluation and comment on financial implications:	
<p>The School's Capital Maintenance Project is funded by the Schools Condition Allocation Grant from the Dfe. All consequential revenue costs will be met by schools via the Dedicated Schools Grant.</p> <p>In the case of Academy's, any consequential revenue costs arising including additional staffing, utility costs and any on-going day to day repair and maintenance of the asset will be the responsibility of the Academy and funded from the Academy's General Annual Grant (received by the Academy from the EFA)</p>	
E3. Approach to optimism bias and provision of contingency	
<p>Contingencies will be developed on a project-by-project basis based on the risk of the scheme and unknowns. These will be quantified and presented in FBC's for approval for each project.</p>	
E4. Taxation	
<i>Describe any tax implications and how they will be managed, including VAT</i>	
N/A	
F. PROJECT MANAGEMENT CASE	
<i>This considers how project delivery plans are robust and realistic</i>	
F1. Key Project Milestones	Planned Delivery Dates
Cabinet Approval for the OBC	19 th March 2024
Spend Approvals	1 st April 2024 onwards
Project works order to be issued	1 st May 2024 onwards
Works to commence on site	From May 2024
Programme completion	Throughout 2024/25
F2. Achievability	
<i>Describe how the project can be delivered given the organisational skills and capacity available</i>	
<ul style="list-style-type: none"> • Scope of programme is identified • Programme and costs have been developed where possible • Funding strategy is in place • Client liaison between EdI and Acivico is taking place weekly to ensure work is instructed, monitored and delivered to cost and on time • Project officers from the EdI team will oversee the delivery of the projects in consultation with key stakeholders i.e. Acivico, contractors, schools, surveyors and 	

other property professionals. The team is extremely experienced in managing school based condition projects.

F3. Dependencies on other projects or activities

- Condition Surveys
 - Statutory compliance requirements
 - Emergency repairs identified by Acivico surveyors
 - Placing orders with contractors
 - Supply chain activities i.e. manufacture and ordering e.g. boilers, windows, etc., including batching of projects to achieve economies of scale.
 - School term time activities and the imperative to preserve educational continuity
- Planning and Building Regulation approval, where applicable

F4. Products required to produce Full Business Case

This should be a full list of the items required in order to produce a Full Business Case.

The work includes:

- Detailed surveys, some of which are intrusive;
- Feasibility work in preparing and agreeing schemes with EdI and the school;
- Scheme design and specification including where required submitting Planning and Building Regulations applications including payment of their fees;
- Detailed design and specification;
- Project and programme planning; and
- Procurement to enable compliant contracts to be awarded

F5. Estimated time to complete project development to FBC

Give an estimate of how long it will take to complete the delivery of all the products stated above, and incorporate them into a Full Business Case.

Up to 6 weeks to obtain target costs for schemes. Approval will be dependent upon value. As the majority of these works are below £0.200m they will be approved under Head of Service or Chief Officer delegation.

F6. Estimated cost to complete project development to FBC

Provide details of the development costs shown in Section F1 above (capital and revenue). This should include an estimate of the costs of delivering all the products stated above, and incorporating them into a Full Business Case. The cost of internal resources, where these are charged to the project budget, should be included. A separate analysis may be attached.

Any Individual project development costs are contained within the overall indicative capital allocations. To support budgeting, Acivico Ltd will provide timely pre-tender estimates for the works reflective of current market conditions based on the construction start dates.

F7. Funding of development costs

Provide details of development costs funding shown in Section F1 above.

DfE School Condition Allocation

F8. Officer support

Project Manager: Baljeet Uppal, Acting Capital Programme Manager

0121 464 9855, Baljeet.uppal@birmingham.gov.uk

<p>Project Accountant: Jaspal Madahar, Finance & Resources Manager – Education Infrastructure 0121 303 3251, jaspal.madahar@birmingham.gov.uk</p>
<p>Project Sponsor: Zahid Mahmood, Acting Head of Service, Education Infrastructure 0121 464 9855, zahid.mahmood@birmingham.gov.uk</p>
<p>F9. Project Management <i>Describe how the project will be managed, including the responsible Project Board and who its members are</i></p>
<p>Projects will be managed and delivered by Project Team as follows:</p> <ul style="list-style-type: none"> • Client for the project is Birmingham City Council. • Project Management services will be provided by Acivico Ltd. • The end-user will be the School. • Regular 2 – 4 weekly meetings will be held with the project team, including client and the end user. • Programme will be monitored and developed to ensure that required timescales are achieved. • Scheme costs are to be continually assessed, developed and monitored.

G. SUPPORTING INFORMATION
(Please adapt or replace the formats as appropriate to the project)

G1. OBC OPTIONS APPRAISAL RECORDS (these are summarised in section C2)
The following sections are evidence of the different options that have been considered in arriving at the proposed solution. All options should be documented individually.

<p>Option 1</p>	<p>Limiting any school condition spend to emergency repairs only and delivering no planned priority condition need maintenance programme</p>
<p>Information Considered</p>	<ul style="list-style-type: none"> • Condition surveys • Structural reports • Statutory compliance reports • Reported issues by schools • Asset Management and Capital Maintenance strategy • BCC and Children & Young People’s directorate business and service priorities • Available budget - DfE allocation for funding, carry forward • Basic need requirements
<p>Pros and Cons of Option</p>	<p>What were the advantages / positive aspects of this option? It could be argued that only the very bare minimum should be spent on maintenance of school buildings in order to mitigate the risk of a future shortfall in funding.</p> <p>What are the Disadvantages / negative aspects of this option?</p> <ul style="list-style-type: none"> ▪ By limiting all repairs to emergencies only, the backlog maintenance issues would escalate across the estate. Not

	<p>taking actions to address priority condition items has the potential of serious health and safety risks for staff and pupils in schools.</p> <ul style="list-style-type: none"> ▪ There is an increasing gap between those schools that have received major capital investment (Building Schools for the future, the 2 major PFI programmes and the Priority School Building Programme) and those that are struggling with inadequate facilities and deteriorating buildings. ▪ Increasing sums are spent on relentless 'patch and repair' due to lack of funding to rectify condition issues and this does not deliver value for money from the public purse. ▪ Increasing numbers of young people are exposed to unsafe and unsuitable learning environments with the associated impact on their achievement and engagement in education. ▪ Adopting an approach based on emergency repairs only will mean that less value is achieved from the maintenance funds available and schools will continue to feel let down in addressing fundamental condition issues that they are encountering. ▪ There will be an increasing risk of school closure / health and safety issues resulting from asset failure. ▪ Many Local Authority Maintained Schools will face increasing challenges coping with inadequate buildings while endeavouring to deliver outstanding education outcomes for all young people. ▪ In the context of direct funding for Academies to address maintenance issues, there will be an increased incentive for schools to convert to Academy status to access funding for condition priorities.
People Consulted	Schools, surveyors and other property professionals / Acivico
Recommendation	REJECT
Principal Reason for Decision	An emergency repairs only strategy is inadequate for the Local Authority to fulfil its duty to maintain our schools and provide a safe learning environment for all our pupils and staff.

Option 2	Take action as set out in this report and its supporting project schedules
Information Considered	<ul style="list-style-type: none"> • Condition surveys • Structural reports • Statutory compliance reports • Reported issues by schools • Asset Management and Capital Maintenance strategy • BCC and People's directorate business and service priorities • Available budget - DfE allocation for funding and carry forward

<p>Pros and Cons of Option</p>	<p>What were the advantages / positive aspects of this option?</p> <ul style="list-style-type: none"> • Meeting the councils statutory duty to maintain its schools • Keeping schools open • Reducing health and safety risks and potential injuries • Meeting statutory compliance requirements • Addressing key condition priorities i.e. essential building repair and maintenance • Provides a balanced approach to planned and emergency repairs • Reducing the number of unplanned / emergency repair requirements <p>What are the Disadvantages / negative aspects of this option?</p> <ul style="list-style-type: none"> • None identified
<p>People Consulted</p>	<p>Schools, surveyors and other property professionals / Acivico</p>
<p>Recommendation</p>	<p>Proceed</p>
<p>Principal Reason for Decision</p>	<p>To maximise the impact of the Local Authority in delivering our statutory duty to maintain our schools and provide a safe learning environment for our pupils and staff</p>

<p>G2. OUTLINE RISKS AND ISSUES REGISTER</p>			
<p><i>Risks should include Optimism Bias, and risks during the development to FBC</i></p>			
<p><i>Grading of severity and likelihood: High – Significant – Medium - Low</i></p>			
Risk or issue	mitigation	Risk after mitigation:	
		Like-likelihood	Sever-ity
1.			
2.			
3.			
4.			
5.			
6.			

OUTLINE BUSINESS CASE (OBC)

A. GENERAL INFORMATION

A1. General

Project Title <i>(as per Voyager)</i>	Basic Need Programme 2024-25+ FUTURE YEARS		
Oracle code	LV0010/LV002D		
Portfolio /Committee	Education & Early Years	Directorate	Children & Families
Approved by Project Sponsor	Zahid Mahmood, Acting Head of Service, Education Infrastructure	Approved by Finance Business Partner	Clare Sandland Business Partner Children & Families

A2. Project Description

Department for Education (DfE) Basic Need (BN) grant and High Need Provision Funding Allocation (HNPA) is awarded to the Local Authority (LA) for the purposes of providing additional mainstream and special school places respectively. These funds are allocated to enable the Council to meet its statutory obligation to provide sufficient school places for our children. The capital projects range from remodelling of existing accommodation, new build extensions to whole new build schools.

Since 2009 over 23,900 additional mainstream school places have been created in Birmingham. These include permanent and temporary expansions as well as bulges to meet in-year growth and includes new schools. The last School Capacity (SCAP) return to the DfE was submitted at the end of July 2023 and has been signed off. This return provides a clear indication of our requirements for 2023/24 to 2029/30, reflecting in particular the requirement for additional secondary places to meet demand. The secondary place demand was outlined originally in the School Place Planning Requirements 2018/19 to 2024/25 document published in December 2018 as a result of higher primary cohorts, continued growth and new housing developments. Since that publication, updated annual forecasts as a result of changes to planning areas, migration in the region and local housing developments has prioritised target areas for additional places in both the north of the city (Erdington and Sutton Coldfield), as well as southeast Birmingham (Hall Green and Selly Oak). The latest mainstream place planning update was shared at ECSLT in November 2023.

Since 2015 over 670 additional special educational needs (SEND) places across special schools, as well as over 150 additional places across new or expanded resource bases, have been created. The first SEND SCAP return to the DfE was submitted at the end of July 2023 and has now been signed off. Work is ongoing to meet current and forecast demand to meet the needs of our City with a SEND sufficiency publication expected in April 2024.

B. STRATEGIC CASE

This sets out the case for change and the project's fit to the Council Plan objectives

B1. Project objectives and outcomes

The case for change including the contribution to Council Plan objectives and outcomes

Projects have been developed and delivered to maximise alignment with local priorities, in particular to impact on developing skills, employment opportunities, public health and community cohesion. Works will contribute to the Council Business Plan and Budget

2024, particularly ‘A Prosperous City’, by ensuring the provision of school places enabling children to benefit from education through investment at a neighbourhood school

B2. Project Deliverables
These are the outputs from the project eg a new building with xm2 of internal space, xm of new road, etc

Provision of additional special and secondary pupil places across various districts.

The benefit of expanding these schools will enable Birmingham City Council to meet its statutory obligation under the Education Act 1996 to provide special, primary and secondary pupil places to all of its school-age resident children. The consequences of the City Council not meeting this duty are serious and would involve considerable financial and reputational costs. This project will ensure that quality places will be available for local children thus contributing to the safeguarding agenda

B3. Project Benefits
These are the social benefits and outcomes from the project, eg additional school places or economic benefits.

Measure	Outline Impact
<i>List at least one measure associated with each of the objectives and outcomes in B1 above</i>	<i>What the estimated impact of the project will be on the measure identified</i>
The students will be taught in modern fit for purpose accommodation allowing for the delivery of a quality education.	Providing appropriate accommodation addresses identified demand and fulfils the Authority’s statutory obligations to provide sufficient pupil places
The project delivers new teaching spaces.	Raised standards, improved behaviour, staff well-being and reduced turnover, mobility, facilitation of the sharing of good practice.
Support and enrich community and family learning e.g. positive parenting programme, basic skills, opportunities to address worklessness.	Children and young people will have a safe, warm and dry environment before, during and after school hours.
Promoting designs which support Birmingham’s Education Vision.	Creating teaching and learning environments that are suitable for delivering education.

B4. Property implications
Describe any implications for Council properties and for the Council’s property strategies

N/A

C. ECONOMIC CASE - OPTIONS APPRAISAL
This sets out the options that have been considered to determine the best value for money in achieving the Council’s priorities

C1. Options reviewed
A full description and review of each option is in Section G1

- Option 1** - Create additional places in temporary accommodation
- Option 2** - To increase class sizes
- Option 3** - To provide permanent new build and remodelled accommodation

C2. Summary of Options Appraisal – Price/Quality Matrix

Ratings from	Options	Weighting	Weighted Score
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APPENDIX 3

1 (lowest) - 10 (highest)							
Criteria	1	2	3		1	2	3
Total Capital Cost	5	10	3	25	125	250	75
Full Year Revenue Consequences	1	5	10	5	5	25	50
Quality Evaluation Criteria							
1) Programme allows occupation by Sep 2023-24	10	10	10	20	200	200	200
2) Effectiveness: allows delivery of quality education	1	3	10	20	20	60	200
3) Functionality : meets service delivery and service user requirements and delivers quality places	1	2	10	20	20	40	200
4) Achievable : will meet statutory responsibility on school places	10	2	10	10	100	20	100
Total				100%	470	595	825

C3. Option recommended, with reasons

Which option is recommended and the key reasons for this decision.

Option 3 to build new and remodel existing accommodation in order to expand existing school sites to meet BCC basic need of additional special, primary and secondary places. Reasons:

- Best use of Government Grant available
- Will allow schools to meet requirements for additional places

Will meet BCC statutory obligations and provide a local place for local children

C4. Risks and Issues of the preferred option

Possible disruption to school and community while build takes place.

C5. Other impacts of the preferred option

Describe other significant impacts, both positive and negative

- Best use of DfE Basic Need funding
- School and community (parental and wider) buy in
- Delivers quality places

- Complies with safeguarding principles

D. COMMERCIAL CASE

This considers whether realistic and commercial arrangements for the project can be made

D1. Partnership, Joint venture and accountable body working

Describe how the project will be controlled, managed and delivered if using these arrangements

N/A

D2. Procurement implications:

What is the proposed procurement strategy and route? Which Framework, or OJEU?

The Council's primary procurement route for works of this nature is to use Acivico Ltd's Constructing West Midlands 2 Framework Agreement either undertaking a further competition exercise (this being the default route) or a direct award, subject to the complexities and timescales of each project in order to ensure that the Council's statutory duties are met. Where direct award is the route, value for money will be demonstrated by Acivico Ltd to the Council and reported in any award report.

Works undertaken under £0.025m will be undertaken by Acivico Ltd under the Council's Design, Construction and Facilities Management

Where a grant is issued to a school for the works, the responsibility for the procurement and award of contract is with the school under their governance arrangements. The Conditions of Grant Agreement will include the requirement to demonstrate to the Council value for money and compliance to any legislation including the Public Contracts Regulations 2015 from the issue of the payment.

E. FINANCIAL CASE					
<i>This sets out the cost and affordability of the project</i>					
E1. Financial implications and funding					
5. Capital Costs & Funding		<i>Financial Year 2024/25</i> <i>£m</i>	<i>Financial Year 2025/26</i> <i>£m</i>	<i>Financial Year 2026/27</i> <i>£m</i>	<i>Totals</i> <i>£m</i>
<u>Expenditure</u>					
Development Funding to proceed to Full Business Case (BN & HNP)		3.000	2.000		5.000
Implementation Cost Basic Need		8.690	26.132	0.149	34.971
Implementation Cost High Needs		18.885			18.885
Totals		30.575	28.132	0.149	58.856
<u>Funding</u>					
Basic Need Grant		9.191	26.182		35.373
S106 Funding		2.499	1.950	0.149	4.598
High Needs Provision		18.885			18.885
Totals		30.575	28.132	0.149	58.856

E2. Evaluation and comment on financial implications:	
<p>The School's Basic Need/High Needs Provision Project is funded by the Basic Need and High Needs Provision Grant from the Dfe. All consequential revenue costs will be met by schools via the Dedicated Schools Grant.</p> <p>In the case of Academy's, any consequential revenue costs arising including additional staffing, utility costs and any on-going day to day repair and maintenance of the asset will be the responsibility of the Academy and funded from the Academy's General Annual Grant (received by the Academy from the EFA)</p>	
E3. Approach to optimism bias and provision of contingency	
Contingencies will be developed on a project-by-project basis based on the risk of the scheme and unknowns. These will be quantified and presented in FBC's for approval for each project	
E4. Taxation	
<i>Describe any tax implications and how they will be managed, including VAT</i>	
F. PROJECT MANAGEMENT CASE	
<i>This considers how project delivery plans are robust and realistic</i>	
F1. Key Project Milestones	Planned Delivery Dates
Cabinet Approval for the OBC	19 th March 2024
Spend Approvals	1 st April 2024 onwards
Project works order to be issued	1 st May 2024 onwards
Works to commence on site	From May 2024
Programme completion	Throughout 2024/25
F2. Achievability	
<i>Describe how the project can be delivered given the organisational skills and capacity available</i>	
<ul style="list-style-type: none"> Schools in scope for expansion are identified Programme and costs have been developed where possible Funding strategy is in place Client liaison between EdI and Acivico is taking place weekly to ensure work is instructed, monitored and delivered on time Project officers from the EdI team will oversee the delivery of the projects in consultation with key stakeholders i.e. Acivico, contractors, schools, surveyors and other property professionals. The team is extremely experienced in managing expansion project 	

F3. Dependencies on other projects or activities
<ul style="list-style-type: none"> • Planning Permission will be sought.
F4. Products required to produce Full Business Case
<i>This should be a full list of the items required in order to produce a Full Business Case.</i>
<p>The work includes:</p> <ul style="list-style-type: none"> • Selection of school • A range of detailed surveys, many of which are intrusive • Extensive feasibility work in preparing and agreeing schemes with the Client and each school end user • Scheme design and specification by all disciplines to a stage where Planning and Building Regulations applications can be submitted including payment of their fees • Detailed design • Specification, • Project planning • Procurement to a stage where contracts can be entered into and the scheme built.
F5. Estimated time to complete project development to FBC
<i>Give an estimate of how long it will take to complete the delivery of all the products stated above, and incorporate them into a Full Business Case.</i>
Up to 3 months to complete all programmes to stage D design and obtain target costs for schemes. FBC`s will then be provided for final programme.
F6. Estimated cost to complete project development to FBC
<i>Provide details of the development costs shown in Section F1 above (capital and revenue). This should include an estimate of the costs of delivering all the products stated above, and incorporating them into a Full Business Case. The cost of internal resources, where these are charged to the project budget, should be included. A separate analysis may be attached.</i>
Development of proposals to FBC/Contract Award stage by EdI and Acivico are estimated at £3.000m. These costs will be incurred in progressing each scheme to stage D, development of design and cost plan, after which contracts can be entered into and construction can begin
F7. Funding of development costs
<i>Provide details of development costs funding shown in Section F1 above.</i>
DfE Basic Need Grant
F8. Officer support
<p>Project Manager: Baljeet Uppal, Acting Capital Programme Manager 0121 464 9855, Baljeet.uppal@birmingham.gov.uk</p>

Project Accountant: Jaspal Madahar, Finance & Resources Manager – Education Infrastructure 0121 303 3251, jaspal.madahar@birmingham.gov.uk

Project Sponsor: Zahid Mahmood, Acting Head of Service, Education Infrastructure 0121 464 9855, zahid.mahmood@birmimingham.gov.uk

F9. Project Management

Describe how the project will be managed, including the responsible Project Board and who its members are

Projects will be managed and delivered by Project Team as follows:

- Client for the project is Birmingham City Council.
- Project Management services will be provided by Acivico Ltd.
- The end-user will be the School.
- Regular 2 – 4 weekly meetings will be held with the project team, including client and the end user.
- Programme will be monitored and developed to ensure that required timescales are achieved.

Scheme costs are to be continually assessed, developed and monitored

G. SUPPORTING INFORMATION

(Please adapt or replace the formats as appropriate to the project)

G1. OBC OPTIONS APPRAISAL RECORDS (these are summarised in section C2)

The following sections are evidence of the different options that have been considered in arriving at the proposed solution. All options should be documented individually.

Option 1	Create additional places in temporary accommodation
Information Considered	<p>What information was considered in making the decision</p> <ul style="list-style-type: none"> • Best use of DfE non ring-fenced Basic Need and School Condition grants in investing in quality spaces • Planning Guidance • Ofsted safeguarding principles • Delivery of quality places
Pros and Cons of Option	<p>What were the advantages/positive aspects of this option?</p> <ul style="list-style-type: none"> • Less cost to BCC • Easier to deliver than permanent build • Faster to deliver • Meets BCC statutory obligation to provide places • Can be removed once demand reduces <p>What are the disadvantages/negative aspects of this option?</p> <ul style="list-style-type: none"> • Safeguarding risks increase as temporary buildings tend to be standalone away from the main building • Governing body/parental resistance to temporary accommodation • Planning approval will not be given for more than 3 years following which units would need to be removed • Isolation from main school • Does not improve the school environment
People Consulted	Head Teachers, School Governors, DfE, Acivico consultants, contractor partners
Recommendation	Proceed or Abandon this Option? <i>Proceed in certain circumstances where provision is required for short period</i>
Principal Reason for Decision	Suitable where short term solution is required.

Option 2	To increase class sizes
Information Considered	<p>What information was considered in making the decision?</p> <ul style="list-style-type: none"> • Class size legislation • Best use of DfE un-ring-fenced Basic Need Funding • Ofsted safeguarding principles • Teacher/HT/Governor associations • Delivery of quality places
Pros and Cons of Option	<p>What were the advantages/positive aspects of this option?</p> <ul style="list-style-type: none"> • Less cost to BCC • Faster to implement <p>What are the disadvantages/negative aspects of this</p>

	<p>option?</p> <ul style="list-style-type: none"> • Does not guarantee to meet BCC statutory obligation for provision of places • Not best use of DfE un-ring-fenced Basic Need • Infant class size legislation requires no more than 30 pupils to be taught by one teacher in Key Stage 1 classes. • Admissions authority would have to employ additional teachers at significant cost. • Safeguarding risks increase • Governing body/parental/Teaching Associations resistance to increased class sizes • Increased Health & Safety issues due to potential overcrowding • Negative impact on standards • Negative impact on applications for places
People Consulted	Head Teachers, School Governors, DfE, Acivico consultants, contractor partners
Recommendation	Proceed or Abandon this Option? Abandon
Principal Reason for Decision	Class size legislation, Trade Union/Professional Association and parental concerns will lead to negative impact on school and reduction in applications

Option 3	To provide permanent new build and remodelled accommodation
Information Considered	<p>What information was considered in making the decision</p> <ul style="list-style-type: none"> • Best use of DfE un-ring-fenced Basic Need funding • Planning Guidance • Ofsted safeguarding principles • Delivery of high quality places
Pros and Cons of Option	<p>What were the advantages/positive aspects of this option?</p> <ul style="list-style-type: none"> • Best use of DfE Basic Need funding • School and community (parental and wider) buy in • Delivers quality places • Will meet timescale using CWM Framework • Complies with safeguarding principles <p>What are the disadvantages/negative aspects of this option?</p> <ul style="list-style-type: none"> • Funding requirement • Possible disruption to school and community while build takes place
People Consulted	Head Teachers, School Governors, DfE, Acivico consultants, contractor partners
Recommendation	Proceed or Abandon this Option? Proceed where provision is required in the long term
Principal Reason for Decision	Best use of DfE Basic Need funding where long term solution is required.

G2. OUTLINE RISKS AND ISSUES REGISTER

Risks should include Optimism Bias, and risks during the development to FBC

Grading of severity and likelihood: High – Significant – Medium - Low

		Risk after mitigation:	
Risk or issue	mitigation	Like- lihood	Sever- ity
1.			
2.			
3.			
4.			
5.			
6.			