

## FULL BUSINESS CASE (FBC)

### A. GENERAL INFORMATION

#### A1. General

<b>Project Title</b> <i>(as per Voyager)</i>	<b>CALTHORPE SCHOOL FULL BUSINESS CASE</b>		
<b>Voyager code</b>			
<b>Portfolio /Committee</b>	Education and Skills	<b>Directorate</b>	Education, Skills & Culture
<b>Approved by Project Sponsor</b>	Jaswinder Didially 13.02.20	<b>Approved by Finance Business Partner</b>	Paul X Stevenson 28.02.20

#### A2. Outline Business Case approval *(Date and approving body)*

Cabinet Report 26th March 2019 – Schools Capital Programme – School Condition Allocation, Basic Need Allocation 2019 -20 + Future Years

#### A3. Project Description

The Works comprise of fully stripping and fully modernising all internal walls, joinery, finishes and building services, external windows and roof coverings, external play surfaces and vehicle driveways. Refurbishment features include improved acoustic, robustness, safety and thermal performance of the building and externally enhanced perimeter fencing and access control to adequately secure the facility. The completed design will provide 5 classrooms with in-built safely accessible storage, and off-classroom accessible WC areas and break-out Learning / calm rooms; The teaching areas are supported by a Food preparation/ learning room, a staff room and facilities, an office and 'air-lock' secure reception area.

#### A4. Scope

This scheme involves works as described in the above project description

#### A5. Scope exclusions

No works outside this scope will be undertaken

### 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*

- Council Business Plan and Budget 2019+;
- A Fair City: Tackling Inequality and Deprivation;
- Laying the foundations for a Prosperous city based on an inclusive economy;
- A Democratic City involving local people and communities in the future of their local area and public services: a City with local services for local people;
- Enjoy and achieve by attending school;
- Schools Capital Programme

**B2. Project Deliverables**

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

Internal Refurbishment of existing building to create appropriate space for SEND pupils.

**B3. Project Benefits**

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

Measure	Impact
<i>List at least one measure associated with <b>each</b> of the objectives and outcomes in B1 above</i>	<i>What the estimated impact of the project will be on the measure identified – please quantify where practicable (eg for economic and transportation benefits)</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 places.	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. Benefits Realisation Plan**

*Set out here how you will ensure the planned benefits will be delivered*

Benefit	How Benefit will be delivered
The students will be taught in modern fit for purpose accommodation allowing for the delivery of a quality education.	Ridge & Partners have provided full design and specification for the works compliant to current Building Regulations for school buildings and aligned with DoE design guidance for special schools BB104 and their Output Specification generic design brief with technical annexes for school building projects, and in regular consultation with Calthorpe school who have extensive experience of the required environment and facilities to deliver the high quality of education for the children and staff this facility will support. The construction quality of the works will be routinely monitored and measured against this specification during the construction process to ensure completion standards required are achieved
The project delivers new teaching places.	The remodelling and refurbishment design and contracted works will provide for 40 new children places inclusive of 5 classrooms, supportive breakout learning and assisted changing WC spaces, external secure play areas, and supporting staffroom, staff welfare, office and reception areas. The facilities have been professionally designed to meet the specific needs for teaching and delivering essential support services to children with complex autism.

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Support and enrich community and family learning e.g. positive parenting programme, basic skills, opportunities to address worklessness.	The refurbishment will provide a safe and effective learning environment for those primary age students with a diagnosis of complex Autism. The addition places will support the community for those parents whose child require a special school placement but there is no current provision available.
Promoting designs which support Birmingham's Education Vision.	The refurbished building will be welcoming, accessible and inclusive, reflecting the SEND code of practice, Department of Education area guidelines for SEND provision (BB104), and Building Regulations England. The design will fully support a range of autism needs providing additional places for primary age children to meet their individual needs at different ages. The completed teaching unit is fully supported by the wider all-through facilities and SEND teaching experience of Calthorpe Special school near to the new facilities, extending the flexibility of access to local places Birmingham can offer the immediate community.

### B5. Stakeholders

A stakeholder analysis is set out at G4 below.

## C. ECONOMIC CASE AND 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. Summary of options reviewed at Outline Business Case

*(including reasons for the preferred option which has been developed to FBC)*

*If options have been further developed since the OBC, provide the updated Price quality matrix and recommended option with reasons.*

- The option of doing nothing would mean the City Council failing to meet its statutory obligation to ensure that there are sufficient pupil places, promote diversity and increase parental choice through planning and securing additional provision.
- The recommended option is to refurbish the existing building to provide a fit for purpose facility capable of accommodating SEND pupils.

### C2. Evaluation of key risks and issues

*The full risks and issues register is included at the end of this FBC*

- Weekly meetings are held to ensure that all parties are informed of progress to ensure any concerns are picked up at the earliest opportunity and resolved to ensure that the programme stays on track. Where costs are seen to escalate, a value engineering exercise is undertaken to ensure that the costs do not exceed the approved budget.
- To ensure Birmingham City Council meets its statutory obligations by providing sufficient capacity for educating children.
- Disruption risks to school operations are minimised as the current site is vacant. Ridge have many years' experience at delivering refurbishment projects to special schools of this nature and will manage and co-ordinate the works in consultation with the school.
- A Ridge Health & Safety Consultant has also been appointed by the school to oversee all CDM duties including Principal Designer role and management of the design and overall project risk register

**C3. Other impacts of the preferred option**

*Describe other significant impacts, both positive and negative*

- Facilities will provide appropriate accommodation to meet education standards for 21st Century teaching provision.

**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*

Scheme will be delivered by Project Team as follows:

- Client for the Project is Calthorpe School
- Project & Cost Management, Contract Administration and Principal Designer services will be provided by Ridge & Partners LLP
- End User will be Calthorpe School
- Contractor has been selected through competitive tender process

Project will be managed by Ridge & Partners with the Contractor and End User throughout the duration of the project development and delivery to ensure that project deliverables are achieved.

- Project deliverables established with Calthorpe School and Birmingham City Council
- Regular weekly site inspection visits and reports by Ridge & Partners to aid project communication, early warning and track project progress
- Regular 4-weekly progress meetings held with Project Team
- Engagement meetings held with End User
- Programme monitored and developed to ensure that required timescales are achieved (subject to timely funding approval and main contractor confirmed appointment)
- Scheme costs assessed, developed and monitored through weekly site inspections and 4 weekly progress and valuation reviews
- Surveys of the site carried out to establish site specifics to confirm programme and costs

**D2. Procurement implications and Contract Strategy:**

*What is the proposed procurement contract strategy and route? Which Framework, or OJEU? This should generally discharge the requirement to approve a Contract Strategy (with a recommendation in the report).*

The procurement route for this project is via single stage open traditional tender aligned with Calthorpe School and EU Procurement Law. Contractors were invited to tender with a pre-qualification stage including but not limited to Financial, Insurance, and project & personnel experience related to the type of works. Ridge & Partners developed full detailed designs and specifications for the works and a pre-tender estimate to achieve best value for money based on current DfE education space guidelines and industry benchmark rates. Ridge & Partners will provide Project, Cost and Contract Management services and close project progress monitoring to ensure value for money is achieved throughout delivery.

**D3. Staffing and TUPE implications:**

No TUPE implications via the capital project

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Capital Costs & Funding	Voyager Code	Financial Year	Financial Year	Totals
		2019/20	2020/21	
<b>Expenditure</b> Calthorpe Academy (Belgravia)				
Construction costs, incl. Surveys, Investigations, & Statutory Fees		£380,442	£505,782	£886,224
Acivico		£1,000	£3,000	£4,000
Edl		£11,443	£15,263	£26,706
<b>Total Project Cost</b>		<b>£392,885</b>	<b>£524,045</b>	<b>£916,930</b>
<b>Funding sources</b>				
<b>Special Provision Fund Allocation</b>		£392,885	£524,045	£916,930
<b>Totals</b>		£392,885	£524,045	£916,930

<b>E2. Evaluation and comment on financial implications:</b>
<p>The current costs for the project are based on a committed JCT Intermediate 2016 Contract value offer.</p> <p>The Contractor's proposals include a fully costed Activity Schedule against the full detailed design already completed by Ridge &amp; Partners in conjunction with and on behalf of Calthorpe school. The returned offer has additionally been reviewed and assessed against current construction industry values and a pre-tender estimate to ensure that best value is achieved.</p>
<b>E3. Approach to optimism bias and provision of contingency</b>
N/A
<b>E4. Taxation</b>
<i>Describe any tax implications and how they will be managed, including VAT</i>
N/A

F. PROJECT MANAGEMENT CASE		
This considers how project delivery plans are robust and realistic		
F1. Key Project Milestones		Planned Delivery Dates
The summary Project Plan and milestones is attached at G1 below		
Cabinet Member Approval		April 2020
Main Construction works		April 2020
Practical completion		August 2020
F2. Achievability		
Describe how the project can be delivered given the organisational skills and capacity available		
<ul style="list-style-type: none"><li>• Scope of work identified as in the project description.</li><li>• Site investigation reports have shown no abnormal conditions.</li><li>• Programme and costs developed.</li><li>• Funding is in place.</li><li>• Contractors have considerable previous experience.</li><li>• Availability of resources.</li><li>• Similar projects have been delivered on budget and to time by using experienced internal project managers, BCC recognised building experts and following BCC guidelines.</li><li>• The project team (Calthorpe School &amp; Ridge &amp; Partners) has successfully delivered similar projects</li></ul>		
F3. Dependencies on other projects or activities		
<ul style="list-style-type: none"><li>• Placing orders with Contractor.</li><li>• Planning Permission (enhanced perimeter fencing only – submitted)</li></ul>		
F4. Officer support		
Project Manager:	Zahid Mahmood 07860906126	Capital Programme Manager, Education Infrastructure <a href="mailto:zahid.mahmood@birmingham.gov.uk">zahid.mahmood@birmingham.gov.uk</a>
Project Accountant:	Jaspal Madahar 07766922478	Finance & Resources Manager <a href="mailto:jaspal.madahar@birmingham.gov.uk">jaspal.madahar@birmingham.gov.uk</a>
Project Sponsor:	Jaswinder Didially 07825 117334	Head of Education Infrastructure <a href="mailto:jaswinder.didially@birmingham.gov.uk">jaswinder.didially@birmingham.gov.uk</a>

**F5. Project Management**

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

As per D1

## G. SUPPORTING INFORMATION

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

### G1. PROJECT PLAN

*Detailed Project Plan supporting the key milestones in section F1 above*

See attachment with this document – Contractor's proposed construction programme which will be included with Contract details



## APPENDIX

### G2. SUMMARY OF 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	Severity	Likelihood
Stakeholders do not consider School Travel Plans and transportation issues prior to consultation	Review school travel plans in partnership with transportation prior to local consultation in order to mitigate possible objections.	Low	High
Stakeholders/ Trust do not engage in project and do not sign up to the solution	The Design Team will ensure regular meetings and consultation with stakeholders and Trust	Low	Medium
New Free Schools and Academies opening across Birmingham	Liaise closely with Free School Providers and Academies when planning the provision of Additional Secondary Places.	Medium	Medium
Building costs escalate	The Design Team will closely monitor the schedule of works and build costs. Cost schedules include contingency sums. Any increase in costs will need to be met through value re-engineering to ensure projected spend remains within overall allocation	Low	Medium
Building works fall behind	The Design Team will closely monitor schemes on site and liaise with Contractor Partners to identify action required.	Medium	Medium
BCC faced with increasing revenue costs	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).	Low	Low
Problems with contract procurement process	Work closely with Partners to ensure compliance with City Council standing orders.	Low	Low

### G3. EXTERNAL FUNDING AND OTHER FINANCIAL DETAILS

*Description of external funding arrangements and conditions, and other financial details supporting the financial implications in section E1 above (if appropriate)*

Special Provision Fund Allocation

## G4. STAKEHOLDER ANALYSIS

Stakeholder	Stake in project	Potential impact on project	What does the project expect from stakeholder	Perceived attitudes and/or risks	Stakeholder management strategy	Responsibility
Cabinet Members for ES&C and F&R	Strategic Overview of DGCF expenditure	High	Ratification of BCC approach to TBN	Strategy not approved	Early Consultation and Regular Briefing on all aspects of Special Provision	BCC / EDI
School's Consultant Partners	Design and Delivery	High	Design of build  Project management	Unable to design to budget Unable to deliver to timescales	Close working with other stakeholders Regular feedback	School Leadership Team / Governors
Planning Officers	Granting Planning Consent	High	Close Liaison with EDI to design a scheme that can receive planning approval	N/A	Frequent communication on all aspects of project design	School's Consultant Project Manager EDI Project Officer
School Leadership Team / Governors	Governing Body Agreement and End Users	High	Compliance with GBA Ongoing Revenue costs for R&M once build complete	N/A	Governing Body Agreement signed and regular project meetings	School Leadership Team / Governing Body EDI Project Officer
Pupils	End user	Low	Consultation	Nil	Through schools council	School Leadership Team
Ward Councillors	Knowledge of other developments affecting local communities that may link into project	High	Consultation with community and support for project	Objections from local residents	Involve in consultation and planning permission process	EDI Project Officer  Governors/ School Leadership Team

**G5. BENEFITS REGISTER**

*For major projects and programmes over £20m, this sets out in more detail the planned benefits. Benefits should be monetised where it is proportionate and possible to do so, to support the calculation of a BCR and NPSV (please adapt this template as appropriate)*

Measure	Annual value	Start date	Impact
<i>List at least one measure associated with <b>each</b> of the outcomes in B1 above</i>			<i>What the estimated impact of the project will be on the measure identified</i>
<b>(A) Monetised benefits:</b>	£		
<b>(B) Other quantified benefits:</b>			
<b>(C) Non-quantified benefits:</b>	n/a		

**Other Attachments**

*provide as appropriate*

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