

Appendix A - FULL BUSINESS CASE (FBC)

A. GENERAL INFORMATION

A1. General

Project Title <i>(as per Voyager)</i>	St. Benedict's Primary School		
Voyager code	CA-01903-02-1-208 1BA0 3R0		
Portfolio /Committee	Education, Skills & Culture	Directorate	Education and Skills
Approved by Project Sponsor	08.05.19	Approved by Finance Business Partner	14.05.19

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 project consists of

Temporary Accommodation,
comprising

- Install of 2 temporary modular porta cabin teaching facilities on site to the Heather Road playground and or staff parking area as necessary.
- Each cabin containing 2 classrooms each (4 classrooms in total).
- Works includes necessary ground work preparation, M&E supplies, specialist teaching facilities and also additional accommodation until 2023.

and

Refurbishment Works to Permanent Accommodation
comprising

- The main block which currently houses the school main hall, redundant kitchen and existing adjacent dining hall will have internal alterations and these will consist of knocking through into the current Library area and re-configuration of the resultant kitchen and enlarged dining area to create a more useable space for the school.
- The Infant Key Stage 1 block will have internal classrooms re-configured as existing classrooms are currently undersized. Toilets to this block will also require refurbishment and or re-fitting to suit the use by lower years children. The remainder of this block will be a light touch refurbishment only.

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;

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- 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
- Compliance with the principles of the 'Birmingham Business Charter for Social Responsibility'.

B2. Project Deliverables

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

- The EDSI brief identifies a fundamental requirement to formalise the school as a two form entry (2FE) i.e; Key Stages 1 & 2 Primary School with additional Nursery year's capacity of approx. 30 children. This requires 14 classrooms plus Nursery area and necessary ancillary spaces.
- There are currently 368 children from Reception through to year 3 along with 30 Nursery.
- There are currently 77 staff members in total on site of which 19 are teachers and 24 are teaching assistants, the remainder being senior leadership, admin and other support staff. It is understood from the school that staff numbers will likely remain the same throughout the change from single form through to two form entry status.
- The school, from this September 2018 currently has a two form entry into Reception year with three and four forms going through Key Stage 1 along with the first year of key stage 2 year 3 children over four classes. Over the next 6 years the school will continue to have two form entry with more upper year class groups as the children progress through the Key Stages 1 and 2 years. Resulting in a full two form entry with two classes per year by 2024.
- It has been confirmed by the school that projected pupil numbers will continue at a two form entry level from this academic year onwards so it is the intention to gradually phase the school intake down to a 2FE Primary with Key Stages 1 and 2 and Nursery years capability. The existing higher school intake numbers will therefore gradually work through the school years with bulge class numbers as required as they pass through the school years.
- The project will rationalise how the existing school can be phased in the first instance and then be formalised as a two form entry Primary to a standard 2FE 420 child intake and nursery provision of approx. 30 children utilising existing classrooms available along with any temporary classrooms required.
- Ultimately once the scheme is complete it will result in the transformation of an existing 5FE infant school into a 2FE primary school.

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 each 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.

For major projects and programmes over £20m:

n/a

B4. Benefits Realisation Plan

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

Project will be managed by EDI and Acivico 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 and being developed with End User
- Regular 2 – 4 weekly meetings held with Project Team
- Engagement meetings held with End User
- Programme monitored and developed to ensure that required timescales are achieved.
- Scheme costs assessed, developed and monitored
- Surveys as required carried out to establish site specifics to confirm programme and costs
- Dialogue with Planners established to ensure that planning considerations are included within proposals and conditions are minimal.

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 would fail to meet its statutory obligation in providing temporary short term additional primary place requirements and appropriate future provision to meet the needs of the children.

C2. Evaluation of key risks and issues

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

- Planning Permission for temporary accommodation - Regular meetings are being held with planners and transportation colleagues to ensure that the application was submitted in addressing comments provided by officers.
- Timescales to deliver required places for academic year 2019/2020 - detailed programme prepared and surveys ongoing to identify site specific requirements and ensure these are factored into works programme.
- Engagement of End User Trust – now that the tender process of appointing a trust has been completed and recommendation is being made to the Head Teachers Board, regular meetings have been set and regular engagement of End User Trust representative to ensure that they are fully supportive of proposals
- Working within a live school site, safeguarding of children and education continuity will be paramount throughout the entire life of this project and regular communication and correspondence with the end user and other key stakeholders will be maintained and implemented while the works are being carried out.

C3. Other impacts of the preferred option

Describe other significant impacts, both positive and negative

- Temporary Accommodation – pupil places will be in place from September 2019 to meet requirement for academic years 2019/20 until 2022/23.

- Permanent 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 Education and Infrastructure
- Project Manager, Quantity Surveyor and Principal Designer services will be provided by Acivico
- End User will be Stars Academies Trust
- Contractor will be Morgan Sindall procured through BCC CWM Framework

Project will be managed by EDI and Acivico 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 and being developed with End User Trust
- Regular 2 – 4 weekly meetings held with Project Team
- Engagement meetings held with End User
- Programme monitored and developed to ensure that required timescales are achieved.
- Scheme costs assessed, developed and monitored
- Surveys of both sites 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 was via the Constructing West Midlands (CWM) Framework using Balfour Beatty as the construction partner. Acivico applied previously approved criteria to achieve best value for money based on current DfE education space guidelines and industry benchmark rates. Acivico will provide Project Management and 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	Financial Year	Totals
		2019/20	2020/21	2021/22	
Expenditure St. Benedict's Primary School	CA-01903-02-1-208 1BA03R0				
Construction costs, incl. Surveys, Investigations, Planning & Statutory Fees , Tier 2 allowances		£2,523,737	£732,857	£0	£3,256,594
Acivico Professional Fees		£164,845	£60,062	£1,233	£226,140
EDSI capitalisation		£50,000	£56,702	£0	£106,702
ICT			£50,000	£0	£50,000
FF&E Fees			£24,000	£0	£24,000
Total Project Cost		£2,738,582	£923,621	£1,233	£3,663,436
Funding sources	CA-01903-02-1-208 1BA03R0				
Basic Need		£2,738,582	£923,621	£1,233	£3,663,436
Totals		£2,738,582	£923,621	£1,233	£3,663,436

E2. Evaluation and comment on financial implications:
<p>The current costs for the project are based on a feasibility design developed with the selected CWM Framework Contractor and have been reviewed and assessed against current construction industry values.</p> <p>The scheme design is being further developed and costs will be updated and reassessed at key stages throughout the development period with a further gateway sign off following completion of detailed design.</p> <p>In the final stage, to Contract Award, Balfour Beatty will tender construction work within the market to ensure that best value is achieved and provide 3 quotes for all necessary packages. Contractors Proposals including fully costed Activity Schedule will be submitted and reviewed by Acivico and EDI and Contract Award will made on agreed submission.</p>
E3. Approach to optimism bias and provision of contingency
Basic Need
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
<i>The summary Project Plan and milestones is attached at G1 below</i>	
Temporary planning application submitted	8th April 2019
Temporary planning application approved	3rd June 2019
Cabinet Approval	26th June 2019
Set Cabins & Temp Classrooms within Car park	1st July 2019
Cabin Set Up Completed	19th July 2019
Construction Period - Phase 1 (Ground Floor) Commencement	22nd July 2019
Construction Period - Phase 1 (Ground Floor) Completion	29th November 2019
Construction Period - Phase 2 (Ground Floor) Commencement	9th December 2019
Construction Period - Phase 2 (Ground Floor) Completion	1st May 2020
Practical completion	5th May 2020
Anticipated date for decommission and removal of porta cabins	August 2023
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 work identified as in the project description. • Site investigation reports have shown no abnormal conditions. • Programme and costs developed. • Funding is in place. • Contractors have considerable previous experience. • Availability of resources. • Similar projects have been delivered on budget and to time by using experienced internal 	

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- project managers, BCC recognised building experts and following BCC guidelines.
- The project team (EdSI and Acivico) has successfully delivered similar projects

F3. Dependencies on other projects or activities

- Placing orders with Contractor.
- Planning Permission

F4. Officer support

Project Manager:	Zahid Mahmood 07860906126	Capital Programme Manager, Education Infrastructure zahid.mahmood@birmingham.gov.uk
Project Accountant:	Nadia Majid 07766922478	Contracts Manager Education Infrastructure Nadia.majid@birmingham.gov.uk
Project Sponsor:	Jaswinder Didially 07825 117334	Head of Education Infrastructure jaswinder.didially@birmingham.gov.uk

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

Attached Programmes for delivery of Temporary and Permanent Accommodation

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 St. Benedict's School and funded via the schools delegated budget.	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)

Basic Need Funding

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 each of the outcomes in B1 above</i>			<i>What the estimated impact of the project will be on the measure identified</i>
(A) Monetised benefits:	£		
(B) Other quantified benefits:			
Provision of the education offer will switch from 5FE infant school to a 2FE primary school, which will assist in meeting the needs of the local community for education offer.			
(C) Non-quantified benefits:	n/a		
Apprentices employed from the local community to deliver project			
Local business used to provide materials and contractors to deliver project			

Other Attachments

provide as appropriate

- Delivery programme

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