

**RECORD OF EXECUTIVE DECISION TAKEN BY AN EXECUTIVE MEMBER OR OFFICER**

This form can be used for any decision but **MUST** be used to record:

- any decision taken by the Elected Mayor or an individual Councillor
- a key decision taken by a Council Officer

In these circumstances the form must be completed and passed to the Head of Members' Services no later than NOON on the second working day after the day on which the decision is taken. No action may be taken to implement the decision(s) recorded on this form until 7 days have passed and the Head of Members' Services has confirmed the decision has not been called in.

**1. Description of decision**

To approve the submission of the draft Outline Business Case (OBC) for the Bedford Academy to Partnerships for Schools (PFS)  
 To accept the sum of up to £300k to fund the costs of procuring a building contractor under the National Contractors' Framework and to manage the building project  
 To grant delegated powers to the Assistant Director (School Organisation and Planning) to:

- make any necessary reasonable alterations to the OBC following discussions with (PFS)
- approve a shortlist of contractors following the procurement process set out by the National Contractors' Framework
- approve a Preferred Bidder to develop proposals for the new facilities for the Academy, following the procurement process set out by the National Contractors' Framework.

**2. Date of decision**

11 February 2010

**3. Reasons for decision**

To enable the Outline Business Case to be agreed with Partnerships for Schools and for a Preferred Bidder to be secured for the delivery of new buildings for the Academy.

**4. Alternatives considered and rejected**

None – This procedure needs to be followed in order to procure new buildings for the Academy under the National Contractors' Framework.

**5. How decision is to be funded**

This project will be funded by a grant from Partnerships for Schools.

**6. Conflicts of interest**

		Did Standards Committee give a dispensation for that conflict of interest? (if yes give details and date of dispensation)

The Mayor has been consulted on this decision

N/A

Signed

*Charles Royden*

Date

11. February 2010

Name of Decision Taker

*CHARLES ROYDEN (DEPUTY MAYOR)*

This is a public document. A copy of it must be given to the Head of Members' Services as soon as it is completed.

Date decision published: 15.2.10

Date decision can be implemented if not called in: 23.2.10

**BEDFORD BOROUGH COUNCIL – DEPUTY MAYOR**

**5 February 2010**

**REPORT BY THE EXECUTIVE DIRECTOR FOR CHILDREN'S SCHOOLS  
AND FAMILIES**

**SUBJECT: CONSTRUCTION OF NEW BUILDINGS FOR THE BEDFORD  
ACADEMY**

**1. EXECUTIVE SUMMARY**

On 24 June 2009, the Executive agreed the closure of John Bunyan Upper School on 31 August 2010 to enable the Bedford Academy to open on 1 September 2010. The Funding Agreement for the Academy has now been signed by the DCSF and the sponsors confirming that the Academy will open on 1 September 2010. The Funding Agreement included provision for the Academy to move to new buildings on the site in 2012. The Local Authority is responsible for the delivery of these buildings. This report seeks the Deputy Mayor's approval to the draft Outline Business Case for these new buildings and the delegation of powers to approve the final version of the Outline Business Case and to identify a preferred bidder for the project.

**2. RECOMMENDATIONS**

That the Deputy Mayor agrees:

- to the attached draft Outline Business Case for the Bedford Academy project and its submission to Partnerships for Schools
- to accept the sum of up to £300k (dependent on costs incurred) to fund the costs of procuring a building contractor under the National Contractors' Framework and managing the building project
- to the Assistant Director (School Organisation and Planning) having delegated powers to make any necessary reasonable alterations to the Outline Business Case, following discussions with Partnerships for Schools in order to get agreement to the Outline Business Case
- to the Assistant Director (School Organisation and Planning) having delegated powers to approve a shortlist of contractors to develop proposals for the new facilities, following the procurement process set out by the National Contractors' Framework
- to the Assistant Director (School Organisation and Planning) having delegated powers to approve a Preferred Bidder to develop proposals for the new facilities for submission to planners, following the procurement process set out by the National Contractors' Framework.

### **3. REASON FOR RECOMMENDATIONS**

- 3.1 In order to be able to progress with the planning and procurement of the new building for the Academy, the Outline Business Case will need to be agreed with Partnerships for Schools and the procurement process for the appointment of contractors to deliver the new building will need to be commenced.

### **4. IMPLICATIONS**

#### **(a) Legal/Policy**

Heads of terms have been signed between the Council and the Academy Trust enabling the Trust to open the Bedford Academy on the John Bunyan site in September 2010. A short-term lease is being drafted in order to lease the site to the Academy Trust during the construction period. When construction has been completed, a long-term lease will be put in place enabling the Academy to occupy the site for a period of 125 years.

#### **(b) Resource**

Subject to agreement to the Outline Business Case, Partnerships for Schools have set aside an indicative allocation of £23.463 million (subject to adjustment in line with construction industry indices) including £300k to fund the costs of the technical advisers and other procurement costs. There would be a risk to the Authority if the £23.463 million indicative budget envelope identified for the project were to be exceeded or if more than the agreed £300k were to be spent on costs associated with the procurement and management of the project. This risk will be mitigated as the result of the employment of technical advisers. In any case, neither eventuality would arise before the contract with the building contractors is signed following agreement to the Final Business Case.

#### **(c) Risk**

The main risks are the financial risks outlined above. Should the costs of constructing the new building not be contained within the envelope set by Partnerships for Schools, any excess may need to be met by the Authority. This risk has been minimised by commissioning surveys of the site to reduce the likelihood of unexpected costs arising and

through the appointment of technical advisers to support a rigorous approach to project management.

There is, however, a further risk to the Authority from the establishment of the Academy in respect of the long-term future of the Bunyan Centre. At present, John Bunyan Upper School makes use of the Bunyan Centre for sports and music facilities and for use as a school hall. The Centre receives income of the order of £300,000 per annum from the School in recognition of this use. The Academy will continue to make use of these facilities from September 2010 until it moves to its new buildings in 2012. However, the new buildings will include both a hall and sports hall, as well as a full set of specialist facilities. Thus the Bunyan Centre risks a reduction in income of around £300,000 per annum. Discussions are ongoing on how best to protect Council Tax payers from the effect of this reduction in income. Officers are seeking to identify solutions which would provide best value for the Council Tax payer and the local community and which may be the subject of a further report to the Mayor / Executive.

## **5. DETAILS**

- 5.1 This report has been submitted to the Deputy Mayor as the Local Government Act 2000 prescribes that the Deputy Mayor must act in the place of the Mayor if for any reason the Mayor is unable to act; the Mayor has a personal and prejudicial interest and therefore cannot act.
- 5.2. On 24 June 2009, the Executive agreed the closure of John Bunyan Upper School from 31 August 2010 subject to the signing of a funding agreement by 1 May 2010 for the establishment of the Bedford Academy on 1 September 2010. This followed a full consultation which resulted in general support for the proposal and the publication of statutory notices, to which no comments or objections were received. The funding agreement was signed between the DCSF and the academy sponsors, the Harpur Trust and Bedford College, on 15 January 2010.
- 5.3. One element of the agreement between the DCSF and the sponsors is the provision of new accommodation for the Academy, ideally from September 2012. Partnerships for Schools, who manage capital funding for schools on behalf of the DCSF, have identified an indicative allocation of £23.463 million (subject to adjustment in line with construction industry indices) to fund the delivery of the new buildings at the school.
- 5.4. It will be the Local Authority's responsibility to deliver the new buildings, working through the National Contractors' Framework established by Partnerships for Schools. This

sets out the procurement process. As a first stage of the process, the former Mayor agreed on 3 June 2009 to the appointment of technical advisers, Aecom, to oversee the project on behalf of the Council. The cost of the technical advisers and other costs associated with the procurement and construction process will need to be met from within the £23.5 million. Appendix 1(a) contains an e-mail from Partnerships for Schools confirming that they have agreed the use of up to £300k from the £23.5 million to cover these costs. Appendix 1(b) contains an indicative breakdown of the costs.

- 5.5. Since their appointment, the technical advisers have commissioned appropriate surveys on the site and buildings in preparation for the procurement of a contractor to deliver the buildings. They have also produced outline plans showing how the brief for the project could be delivered on the site. At the same time they have been pulling together the information required to establish an Outline Business Case (OBC) for the project which, when approved, will provide the blueprint against which potential contractors will bid.
- 5.6. Attached to this report as Appendix 2 is a copy of the draft OBC to deliver by September 2012 new accommodation for 1440 pupils for which Partnerships for Schools has identified indicative capital funding of £23.463 million. The OBC considers the viability of the project in terms of sponsor specification, cost and timescale and will need to be approved by Partnership for Schools before they agree the final funding allocation and procurement of a contractor. The Outline Business Case is supported by the Design User Group which is the formal body set up between the Sponsors and the Authority to manage the project. For reasons of economy, a list of documents to be appended to the OBC has been included in Appendix 2 rather than the documents themselves.
- 5.7. At the end of the building contract and snagging period, the Council will need to transfer the site of the Academy to the Academy Trust under a 125 year lease. Between September 2010 and that time, the Academy Trust will be given access to the existing school building through a short term lease. Heads of terms for this have already been agreed between the Authority and the Academy Trust. (Executive decision 680 gave the Head of Property Services delegated powers in this respect).
- 5.8. Approval is sought:
  - to the attached draft Outline Business case for the Bedford Academy project and its submission to Partnerships for Schools

- to accepting the sum of up to £300k (dependent on costs incurred) to fund the costs of procuring a building contractor under the National Constructors' Framework and managing the building project
- to the Assistant Director (School Organisation and Planning) having delegated powers to make any necessary reasonable alterations to the Outline Business Case, following discussions with Partnerships for Schools in order to get agreement to the Outline Business Case
- to the Assistant Director (School Organisation and Planning) having delegated powers to approve a shortlist of contractors to develop proposals for the new facilities, following the procurement process set out by the National Constructors' Framework
- to the Assistant Director (School Organisation and Planning) having delegated powers to approve a Preferred Bidder to develop proposals for the new facilities for submission to planners, following the procurement process set out by the National Constructors' Framework.

Report Contact Officer:	John Goldsmith
File Reference:	Not Applicable
Previous Relevant Minutes:	Executive: 24 June 2009: John Bunyan Upper School – Proposed Closure and Replacement with an Academy. Executive decision 680: Proposed establishment of an academy to replace John Bunyan Upper School
Background Papers:	Not Applicable

## APPENDIX 1 (a)

### **E-Mail confirming Partnerships for Schools' approval to releasing project support funding to the Local Authority**

**From:** Crawford Wright [Crawford.Wright@partnershipsforschools.org.uk]  
**Sent:** 28 January 2010 11:12  
**To:** John Goldsmith  
**Cc:** Andy Tompkinson  
**Subject:** Project Support Funding - Bedford Academy  
John,

Re Bedford Academy

I can confirm that £300,000 will be topsliced from the capital funding for Bedford Academy to provide project support funding for Bedford Academy.

This will be paid through the standards fund.

Best wishes

Crawford

Crawford Wright  
Project Director

**Partnerships for Schools**

**33 Greycoat Street**

**London**

**SW1P 2QF**

**Tel: 020 3301 7000**

**[www.partnershipsforschools.org.uk](http://www.partnershipsforschools.org.uk)**

**Mobile: 07825171445**

---

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error please notify the sender and delete all copies.  
Partnerships for Schools is registered in England number 4650964. Registered office: 33 Greycoat Street, London SW1P 2QF

## APPENDIX 1(b)

### Likely breakdown of costs of procurement and project management

<b>Service</b>	<b>Likely Cost</b>
Technical Advisers plus cost of producing Outline Business Case	£158,783
Costs of supporting open evening	£4,086
Surveys	£37,016
Workshops for Furniture & Equipment	£2,016
CDM services	c£12,000
Clerk of Works services	c£60,000
Legal Advisers	£2,500
Quantity Surveyor	£18,600
Disconnection of services	£5,000
<b>TOTAL</b>	<b>£300,000</b>



## Bedford Academy

# Outline Business Case 22<sup>nd</sup> January 2010



## **TABLE OF CONTENTS**

<b>EXECUTIVE SUMMARY</b>	<b>11</b>
<b>1 OVERVIEW AND COMMITMENT</b>	<b>16</b>
1.1 The Corporate Vision	16
1.2 Strategic Overview	17
1.3 The Scheme	18
1.4 Sponsor/Academy Trust and LA Commitment	18
1.5 Summary	19
<b>2 PROCUREMENT STRATEGY</b>	<b>20</b>
2.1 Procurement Strategy	20
2.2 Programme of Work	20
2.3 Summary	21
<b>3 DESIGN AND CONSTRUCTION</b>	<b>22</b>
3.1 Site Options Appraisal	22
3.2 Land	24
3.3 Surveys and Investigations	24
3.4 Design Brief	28
3.5 Construction Phasing	29
3.6 Decant Strategy	29
3.7 Health & Safety	29
3.8 Carbon Reduction	29
3.9 Third Party Agencies	30
3.10 Summary	30
<b>4 ICT</b>	<b>32</b>
4.1 Options Appraisal	32
4.2 Interoperability Proposals	33
4.3 Interface with Design and Construction Contract	33
4.4 Summary	34
<b>5 FACILITIES MANAGEMENT</b>	<b>35</b>
5.1 Summary	35

<b>6</b>	<b>AFFORDABILITY</b>	<b>36</b>
6.1	Design and Construction	36
6.2	Abnormal Costs	36
6.3	ICT	36
6.4	Lifecycle/ FM costs	37
6.5	Other sources of funding	37
6.6	Summary	38
<b>7</b>	<b>READINESS TO DELIVER</b>	<b>40</b>
7.1	Project Management	40
7.2	Consultation and Statutory Approvals	42
7.3	Market Testing	42
7.4	Risk	42
7.5	Summary	43
<b>8</b>	<b>MOVING FORWARD</b>	<b>44</b>
8.1	Preparation for Procurement	44
8.2	Summary	44

**APPENDIX 1 – OVERVIEW AND COMMITMENT**

**APPENDIX 2 – PROCUREMENT STRATEGY**

**APPENDIX 3 – BUILDING DESIGN AND CONSTRUCTION**

**APPENDIX 4 – ICT**

**APPENDIX 5 - FACILITIES MANAGEMENT (NOT USED)**

**APPENDIX 6 - AFFORDABILITY**

**APPENDIX 7 - READINESS TO DELIVER**

**APPENDIX 8 - MOVING FORWARD**

## EXECUTIVE SUMMARY

### Introduction

The document outlines the options appraisal, cost estimates, affordability assessment and procurement strategy for the school in sufficient detail to allow capital funding to be confirmed and gain approval to proceed with the delivery of the academy via the PfS Contractors Framework.

### Overview and Commitment

**Section 1** and **Appendix 1** of this OBC describe the Scheme and confirm the commitment of all parties to the procurement process.

The Local Authority has confirmed that the Scheme fits with its local priorities.

The Scheme involves one school

The Education Brief, including the curriculum model and accommodation schedule, has been developed and signed off by the Project Steering Group (PSG) and by the Department for Children, Schools and Families (DCSF). The accommodation schedule details a total area that is within the BB98 gross internal floor area stated in the Funding Allocation Model (FAM).

The Sponsor/Academy Trust and LA confirm their commitment to working together to procure the design and construction of the new Academy using the PfS Contractors Framework and confirm that they will follow established PfS procedures and utilise the standard suite of documents for procurement.

The Sponsor/Academy Trust has signed the Funding Agreement

### Procurement Strategy

**Section 2** and **Appendix 2** of this OBC describe the details of the Scheme being put to the market.

The Scheme is a Single School Project and includes a design and construction project for the new build project for Bedford Academy.

In addition the following services are being procured for the Academy:

- ICT hardware contract, which is to be managed by Novatia ICT consultants.

There is one scheme involved in this procurement. A clear rationale has been followed to select the preferred option.

A realistic programme of work has been put in place based on the guidance issued by PfS. The Building Practical Completion date for the project is detailed below:

- Project: Bedford Academy Building Practical Completion Date: 29/06/12

### Design and Construction

**Section 3** and **Appendix 3** of this OBC describe the site options appraisal undertaken for the building design and construction.

The LA can confirm that they own the land upon which the Academy will be built and that there are no encumbrances or restrictive covenants that would place the development and operation of the Academy at risk.

A robust and thorough options appraisal has been carried out to determine the project proposals. The site options appraisals meet the requirements of Building Bulletin 98 and Building Bulletin 102.

Surveys and investigations have been undertaken and the results evaluated. Collateral warranties are in place for these surveys, with the objective that the Framework Panel Member can rely on their factual accuracy.

An initial control option for the Scheme has been prepared which demonstrates that the Scheme is deliverable. This initial control option has been signed off by the Design Group and PSG as meeting the requirements of the Education brief and Design Brief and as acceptable to all parties.

There is a commitment to implement the requirements of the Minimum Design Standard and a Local Review Design Workshop has been programmed for 4<sup>th</sup> May.

There is a commitment to achieving a BREEAM 'very good' rating.

The Design Brief has been developed. The Scheme will utilise the PfS Authority's Requirement document, amended to suit the local circumstances.

A construction phasing and decanting strategy has been developed.

The FAM for this project includes an allocation of £561,924 to deliver the carbon reduction targets required by the DCSF. The LA confirms that a requirement of the ITT submissions will be for the Panel Members to demonstrate that their proposals will achieve the 60% target within the funding allocation.

All existing and proposed third party users have been identified and there is a strategy in place for providing accommodation for these users where necessary.

## ICT

**Section 4** and **Appendix 4** of this OBC provide an overview of the ICT Vision and the proposed delivery approach for the ICT provision. It encapsulates the preferred delivery method and validates the rationale for that choice, including how the service is intended to integrate with the wider LA provision.

The Sponsor/Academy Trust has conducted a robust and thorough ICT options appraisal to determine the ICT approach.

Stakeholders been consulted in developing the ICT proposals.

The Sponsor/Academy Trust has confirmed that they will procure the ICT provision through the BECTA Framework.

BECTA has reviewed the proposed delivery approach for the ICT provision and confirmed that it is acceptable.

A detailed risk register for the ICT project has been developed and a clear strategy to manage / mitigate ICT risks has also been put in place.

The ICT Output Specification has also been completed to a satisfactory level

## Facilities Management

**Section 5** and **Appendix 5** of this OBC detail the proposals for the provision of Life Cycle and Hard FM, as well as an indication of the costs for Soft FM and Utilities.

The Academy Trust has set out their strategy for delivering life cycle and hard FM services and confirmed that once the LEP for the Bedford Borough BSF project has been established that they will consider buying these services from the LEP.

The Sponsors/Academy Trust has confirmed that they will meet the expected costs for hard FM and lifecycle services from their available budgets.

## Affordability

**Section 6** and **Appendix 6** of this OBC describes the affordability position for the whole Scheme.

The OBC provides a separate cost estimate reconciled against the FAM for both the design and build and ICT elements of the project.

The estimate indicates that the proposals are affordable within the funding allocation.

This section of the OBC confirms the Local Authority's view that the construction scheme represents value for money.

The LA has submitted their application for Project Support Funding and it has been approved by PfS.

The Sponsor and the LA accept that they have to deliver the Academy building

within the agreed funding envelope and they will ensure that the scope of the development work fits within this envelope with due reference to the Framework rates. The Sponsor and the LA will work with the Framework Panel Members to optimise the scope and will undertake any project re-scoping necessary to ensure that the project fits within the funding envelope

### ***Design and Construction***

The initial design options for the Scheme have been fully costed. The cost estimate includes an assessment of likely abnormal costs resulting from the initial site investigations that have been carried out and an assessment of the external works costs based on the agreed control option

The capital costs fit within the Funding Allocation Model (FAM) agreed with PfS.

### ***ICT***

The OBC sets out the cost per pupil in relation to a learning environment, managed service platform.

*Capital Costs* - The initial design options for the Academy have been fully costed and have identified what is to be delivered through the £1450/pupil funding.

We can confirm that the capital costs fit within the Funding Allocation Model (FAM) agreed with PfS.

*Ongoing Costs* - ICT costs have been estimated for a 5 [or 10] year period. The estimated annual cost is [ ] per pupil per annum, £[ ] in total per annum and the Sponsor/Academy Trust has confirmed his commitment to meeting these costs through the General Annual Grant (GAG).

### ***Facilities Management***

Life Cycle and Hard FM costs have been estimated for a 25 year period. The Sponsor/Academy Trust has confirmed their commitment to meeting these costs through their existing budget sources such as the General Annual Grant (GAG) that will be received. The Soft FM and Utilities costs have been estimated over 25 years and these costs have been provided to the Academy for budgetary purposes

## **Readiness to Deliver**

**Section 7** and **Appendix 7** of the OBC sets out the LA's project management structure and identifies the roles and responsibilities of each part of the structure. The key members of the team and the external advisers are named and information is provided on their skills, experience and time commitment to the project. This section also sets out the approved budgets (including consultant advisory fees), risk strategy, market interest and the delegated authorities given to a named senior officer within the key stakeholders.

The Sponsor/Academy Trust and LA, in conjunction with the Department for Children, Schools and Families (DCSF), has followed the project structure and governance for Contractor's Framework Academy projects established by PfS, which includes the creation of a Project Steering Group, a Design Group and the LA Project Team.

The LA has put in place resources for the duration of the project, including post contract, to monitor and maintain ongoing relations with the Framework Panel Member and ensure that performance is continually reviewed.

The LA has contacted the Framework Panel Members and a Bidder day was held on 14<sup>th</sup> December 2009. The event was attended by eleven of the Framework Panel Members.

A risk workshop has been held and a risk strategy developed.

### **Moving Forward**

**Section 8** and **Appendix 8 of this OBC** includes the benchmarking data collected at this OBC stage and confirmation that the documents required for the procurement process have been developed.

A critical review of the options appraisal has been conducted and the benchmarking data needed by PfS has been provided.

The LA Project Team has developed the PITT, draft ITT and associated evaluation matrices and are ready to engage with the Framework Panel Members.

The evaluation team has been established and briefed.

# 1 OVERVIEW AND COMMITMENT

**Section 1** and **Appendix 1** describe the Scheme and confirm the commitment of all parties to the procurement process.

## 1.1 The Corporate Vision

Bedford Borough Council (BBC) is a new unitary authority. It has a population of 155,700 made up of a mix of some 60 different ethnic groups, providing a rich and diverse community.

Regional and strategic planning policies have identified Bedford Borough as an area for significant housing development with the Government wanting 1000 new homes to be built in Bedford annually. The Borough is a mixture of urban and rural areas encompassing the town of Bedford, the adjacent urban area of Kempston and 43 rural parishes. Children aged 0 to 19 years currently make up 25.3% of the population.

Bedford Borough's Sustainable Community Strategy contains seven themes reflecting the priorities of the Borough: Thriving, Greener, Aspiring, Healthy, Safer, Inclusive and Growing. Whilst these themes are interlinked, the main goal in respect of children and young people is to create a Borough where all the Borough's children and young people are able to lead safe, healthy and happy lives, and are provided with opportunities to develop their self-esteem, maximise their life chances and realise their full potential. This goal is supported by three aims:

- to help all children and young people to achieve their full potential through high quality teaching and learning in schools that have accessible community activities and facilities
- to prioritise preventative services for children in their early years to help families stay together and thrive
- to ensure vulnerable children and young people at risk of abuse and neglect are safeguarded and supported to a better life.

Children who live in Bedford Borough have performed poorly in national school tests and examinations for a number of years. Theme 1 of the Children and Young People's Plan is 'Setting high expectations for all within Bedford Borough regardless of background and including those with particular needs.' This is supported by two strands:

- ensuring that all children and young people in Bedford Borough are supported to achieve the highest levels of attainment possible
- giving a particular focus to improving the attainment of the most vulnerable and disadvantaged children and young people, narrowing the gap between them and their peers and raising the bar for all.

Stakeholders including Head teachers and officers have worked together to set ambitious objectives for the Borough's BSF programme with an ambition that all learners, irrespective of age, will:

- have a world class education providing personalised learning, skills, knowledge and self confidence for success in the 21st century
- receive an inspiring, broad, balanced education which stimulates high attainment
- have access to learning regardless of time, place or circumstance facilitated by the best technology available
- be educated in an inclusive environment which fully respects cultural diversity, level of learning and which overcomes any barrier to learning
- be enabled to take ownership of their own learning through good design and

## ICT

- be able to make informed, safe and healthy decisions and judgements
- become responsible citizens, relating to others, understanding and contributing to family, community and cultural life in the context of change.
- be educated in sustainable environments
- be supported in learning by a range of high quality professionals and administrative structures.

Achievement of these key aims for all learners will be aided by:

- establishing agreed performance indicators and success criteria
- building on the successes and lessons learned
- partnerships within, among and beyond schools ensuring that best practice is shared and implemented locally, nationally and internationally
- partnerships with parents and carers that are central to raising achievement for young people
- schools designed to be at the heart of their communities providing access for local people thereby providing opportunity, meeting their needs and raising their aspirations
- innovative partnerships with other services, voluntary agencies and business, in the interests of expanding and enriching educational experience e.g through work experience, mentors for students, teachers into industry placements, providing school governors, access to management expertise etc.

We believe that encouraging these innovative partnerships and increasing diversity are central to our improvement strategy.

## 1.2 Strategic Overview

A major element of our plans under BSF in support of the aim of raising standards is to change from a three tier structure of lower, middle and upper schools to a system of primary schools accommodating children up to the age of 11 and secondary schools catering for the 11-18 age group.

A crucial element of the work to raise standards of performance in the Borough is a focus on raising levels of achievement at those schools which are performing least well. The plans for John Bunyan Upper School to become an academy were developed initially in recognition of low levels of performance and in response to the National Challenge. Whilst it serves a larger catchment area, the school lies at the boundary between the Kingsbrook and Cauldwell wards of the Borough, which between them contain some of the most deprived parts of the Borough.

Whilst the school has shown some improvement over the past 18 months with the proportion of students achieving 5 A\*-C grades at GCSE improving from 34% in 2008 to 72% in 2009, there is still work to do. The proportion of students achieving 5 A\*-C grades at GCSE including English and mathematics in 2009 was 20%, the lowest percentage among upper schools in Bedford Borough and only 1% better than in 2008.

The Borough believes that the establishment of the Bedford Academy would bring a much needed boost to the area. The investment in the Academy, in leadership and curriculum development as well as in buildings, will bring enormous benefits to one of the most deprived parts of Bedford Borough and help to deliver a step change in standards of achievement and thus enhance the life chances of students living in the area. The Council welcomes the involvement of the Bedford Charity (The Harpur Trust) and Bedford College as sponsors of the Academy. Both organisations are very experienced in the field of education and are able to bring together

complementary skills.

### **1.3 The Scheme**

The Academy will be sponsored by The Bedford Charity and Bedford College with specialisms in Science and Technology. The Academy will transform educational outcomes by providing exciting, new and different opportunities for learning and applied learning. As a vibrant and successful centre of excellence, with the highest standards of attendance and behaviour, it will bring about a substantial increase in the educational attainment, expectations and aspirations of students and the whole community.

The Academy will admit 240 students each year, educating a total of 1440 students from 11 to 18, of which 240 will be aged 16-18. The Academy is planned to open in September 2010 in the existing John Bunyan Upper School buildings and will serve the 13-18 age range. It is the intention of the Council and of the sponsors to deliver new buildings in September 2012, with sufficient accommodation for pupils between the ages of 11 and 18; ready to take in Years 7 and 8 in line with the Borough's plans for changing to two tier education over the period 2013-2015.

The project is being delivered through the National Framework as a single school project. The construction elements of the scheme will be procured through a lump sum Design and Build contract between BBC and the selected Framework Member. ICT solutions will be supported by BECTA and delivered through its framework. The Education and ICT visions for the project can be found in Appendices 1A and 4A.

The present buildings are deemed unsuitable for educational purposes and will be replaced and demolished. Current designs indicate a gross floor area of 12,266m<sup>2</sup>. The accommodation schedule can be found in Appendix 1A. The Education Brief, including the curriculum model and accommodation schedule, has been developed and signed off by the Design User Group (DUG) and by the Department for Children, Schools and Families (DCSF). The accommodation schedule details a total area that is within the BB98 gross internal floor area stated in the Funding Allocation Model (FAM).

A number of options have been considered by the DUG, which can be seen in Appendix 3D. Each of the options proposed has attempted to make best use of the site, ensuring that the buildings are designed to make sure that circulation is efficient and that the educational model can be delivered. The option study sets out the key features of each design and reasons for their rejection or approval.

### **1.4 Academy Trust and LA Commitment**

The Academy Trust and LA confirm their commitment to working together to procure the design and construction of the new Academy using the PfS Contractors Framework.

The Academy Trust has been fully involved in the work to develop the OBC and confirms that the concept designs support the Education Brief that has been developed for the Academies.

The Academy Trust and LA can confirm that they will follow established PfS procedures and utilise the standard suite of documents for procurement. This includes the use of the Design & Build Contract Academy Development Agreement, and Design and Build Contracts. Both parties have satisfied themselves with the

outline terms and conditions within these documents. The LA and Academy Trust confirm that they will seek HMRC acceptance of any amendment they make to the standard form of the Development Agreement.

The Academy Trust has signed the Funding Agreement on 15<sup>th</sup> January 2010.

The LA has signed the Memorandum of Understanding and Confidentiality Agreement for the release of information relating to the PfS Contractors Framework.

Confirmation of the closure of the predecessor school has been received.

## 1.5 Summary

The Local Authority has confirmed that the Scheme fits with its local priorities.

The Scheme involves one school – The Bedford Academy.

The Education Brief, including the curriculum model and accommodation schedule, has been developed and signed off by the Project Steering Group (PSG) and by the Department for Children, Schools and Families (DCSF). The accommodation schedule details a total area that is within the BB98 gross internal floor area stated in the Funding Allocation Model (FAM).

The Sponsor/Academy Trust and LA confirm their commitment to working together to procure the design and construction of the new Academy using the PfS Contractors Framework and confirm that they will follow established PfS procedures and utilise the standard suite of documents for procurement.

The Sponsor/Academy Trust has signed the Funding Agreement.

The following documents are attached at **Appendix 1:**

- 1A. Education Brief, including the Curriculum Model and Accommodation Schedule that demonstrates an area within the BB98 gross internal floor area allocation
- 1B. Letter or email from the DCSF confirming that the Education Brief and Accommodation Schedule have been approved
- 1C. A letter of support from the Sponsor/Academy Trust
- 1D. A letter of support from the LA
- 1E. Papers and minutes of LA Cabinet meetings confirming support for the project
- 1F. Memorandum of Understanding
- 1G. Confidentiality Agreement for the release of information relating to the PfS Contractors Framework.
- 1H. Confirmation of School Closure

## 2 PROCUREMENT STRATEGY

**Section 2** and **Appendix 2** of this OBC describe the details of the Scheme being put to the market.

The Scheme is a Single School Project and includes a design and construction project for the new build Bedford Academy.

In addition the following services are being procured for the Academy. The development of these services must run alongside the design and build and key interfaces will be managed:

- ICT hardware contract, which is to be managed by Novatia ICT consultants.

### 2.1 Procurement Strategy

The Scheme will utilise the Lump Sum Option. The scheme will be procured via the PfS Contractors Framework covering Sector 2.

With BBC's BSF programme unlikely to be underway before 2011 there is a requirement for the Council to procure development through the PfS National Contractors Framework.

Procurement and engagement will take approximately twelve months from OBC to contract award. This Framework dictates that the Local Authority will lead a Local Competition which involves the following:

- All Panel Members will be invited to submit their intention to bid;
- The Local Authority and key stakeholders will select a short list of two bidders and work with these bidders to develop proposals for the Academy;
- Evaluate the proposals and select a Preferred Bidder;
- Finalise the designs and agreement to be entered into.

Evaluation Panels will be established to analyse all preliminary and full tender submissions. These panels will include representatives of BBC, Bedford Academy Trust, PfS and the DCSF and will largely mirror the PSG/DUG.

### 2.2 Programme of Work

A detailed programme of work, which includes the development and procurement of the ICT, has been developed based on the guidance issued by PfS. The key milestones from the programme are detailed in the table below.

In due course a planning application will be submitted. The LA is satisfied that all appropriate procedures have been followed and will be followed. The LA can therefore confirm that it is prepared to bear the programme risks of a judicial review arising from a planning application for an academy on the proposed site as shown in the OBC.

Milestone	Date
DCSF/PfS Approval of OBC	19/02/10

<b>Milestone</b>	<b>Date</b>
Issue PITT to Framework Panel Members	19/02/10
Receive PITT Submissions	12/03/10
Announce short listed bidders	26/03/10
Issue ITT to Bidders	26/03/10
Local Review – Design Workshop	04/05/10
Receive ITT Submissions	18/06/10
Announce Selected Panel Member	13/08/10
Submit Detailed Planning Application	13/09/10
Detailed Planning Permission Awarded	03/12/10
Submit FBC	05/11/10
DCSF/PfS Approval of FBC	03/12/10
Award Design and Build	03/12/10
Procurement of ICT Provider via BECTA Framework	30/07/10
Building Completion (20 months)	29/06/12

### 2.3 Summary

The Scheme is a Single School Project Batched Scheme and includes a design and construction project for the new build project for Bedford Academy.

In addition the following services are being procured for the Academy:

- ICT hardware contract, which is to be managed by Novatia ICT consultants.

There is one scheme involved in this procurement. A clear rationale has been followed to select the preferred option.

A realistic programme of work has been put in place based on the guidance issued by PfS. The Building Practical Completion date for the project is detailed below:

- Project: Bedford Academy Building Practical Completion Date: 29/06/12

The following documents are attached at **Appendix 2**

- 2A. A detailed programme of work (Gantt chart, including ICT development and procurement)

### 3 DESIGN AND CONSTRUCTION

**Section 3** and **Appendix 3** of this OBC describe the site options appraisal undertaken for the design and construction works.

#### 3.1 Site Options Appraisal

A feasibility study was undertaken during the latter half of 2009 in order to:

- Assess the capacity and constraints of the site of the existing John Bunyan Upper School, Mile Road, Bedford.
- Identify any site constraints or abnormalities which might lead to exceptional costs.
- Provide illustrative proposals which enable the Sponsors to test and refine their vision for the academy against the characteristics of the site.
- Provide an example scheme which illustrates a possible arrangement of buildings and landscape which could meet the Academy's visions and aspirations; as a benchmark against the bid stage submissions.

The particular documents which have informed the feasibility design, include:

- Bedford Academy Vision Statement
- Bedford Academy Ethos Statement
- Bedford Academy Curriculum Statement
- Bedford Academy School Organisation Statement
- Bedford Academy Design Brief
- Bedford Academy Accommodation Schedule
- Bedford Academy Pupils Brief

In order to ensure that the feasibility design accurately reflected the Sponsors' vision a separate Design User Sub Group (DUSG) was set up. This allowed the reference scheme to be developed collaboratively and at speed. A full version of the feasibility study can be found in Appendix 3c.

Before the reference scheme was finalised a number of other options were developed. These were made available to parents of prospective pupils of the new academy via the Bedford Academy website and at the open evening for prospective pupils. In addition they were presented to the following interest groups, and feedback from these groups has been incorporated into the reference scheme:

- The Bedford Academy Design User Sub Group
- The pupil council of John Bunyan Upper School
- The staff of John Bunyan Upper School
- The Bedford Academy Sponsor Reference Group (representing the feeder schools and wider community)

The feasibility study is based on PfS funding for 100% new build. However, early discussions with the Sponsors confirmed a strong desire that the existing buildings should remain in place until the new academy is completed:

- To allow minimise disruption to the students
- To allow the academy to be established within the existing building without the added disruption of a move to temporary buildings
- To reduce and mitigate risks to health and safety.

- To eliminate the cost of temporary buildings for staff or students.

Four main factors have influenced the recommendation for the optimum build zone on the site:

- The need to retain the existing buildings, (including the hard and soft surfaces within the secure fence line) during construction: The area hatched red on the above diagram)
- The desire to avoid the flood risk zone (to avoid the need for complicated negotiations with the Environment Agency)
- The desire to avoid developing too close to the properties on the east boundary (to reduce the risk of objections to the planning application)
- To comply with the recommendations of the acoustic report, to avoid developing close to Mile Road.

However once these areas have been ruled out for development, the remaining area is still more than adequate to develop the academy buildings at two storeys. The Building Bulletin 98 gross site area range is 79,728 m<sup>2</sup> – 100,850m<sup>2</sup> for a secondary school of 1440 pupils. The total John Bunyan Site Area is 81,840m<sup>2</sup>: This is within the range of gross area recommended by the Building Bulletin,.

The minimum team game area for a school of this size to comply with the School Premises Regulations is 60,400m<sup>2</sup> which includes hard and soft surfaces, and can be reduced by the inclusion of a MUGA. This leaves 21,440m<sup>2</sup> available for buildings, parking, roads, footpaths, habitat and informal recreation areas.

It has been concluded that the site can sustain the proposed level of development at two storeys with a single storey hall, sports hall and dining hall. In addition the site can sustain team games areas which comply with the school premises regulations, parking, and access.

The preferred option is set out on an East/West axis with teaching clusters facing north. Its key features include:

- Prominent Entrance
- Opportunity for central circulation 'street' which could include information points, snack bars, etc.
- Strawberry clusters face north to address Mile Road, and to provide good natural daylight without overheating.
- Spaces with a large volume (Hall, Dining, Sports Hall) or those requiring mechanical ventilation (Kitchen, Tech rooms) face south to mitigate overheating during the summer.
- Large Perimeter to maximise natural ventilation
- Position on site requires extended access road, but will make it more difficult for unwanted visitors to approach undetected
- Split between 'public' and 'private' space would be easy to manage
- Hard play area could be at the front (public) or rear (private)
- No natural secure perimeter to the building

The DUSG particularly liked the way this option addressed the site. The orientation of the classroom clusters means they are less likely to overheat, and they are highly visible from Mile Road. This scheme also gives opportunity for a striking entrance which is easy to find on the Mile Road elevation.

### **3.2 Land**

A plan of the site to be transferred to the Academy Trust under the 125 year Long Lease has been agreed.

The LA confirms that they understand the requirements of Clause 4 and Schedule 15 of the Design & Build Contract regarding matters of land title and will provide all such information as required under the terms of the Contract. The required Title Information is contained in Appendix 3B of this OBC.

There is no land disposal associated with this Scheme and the whole of the site (excluding the site of the Bunyan Sports Centre) will transfer to the Academy Trust. Similarly, there is no land acquisition associated with this scheme.

The LA can confirm ownership details of the site are as follows, the freehold of the Property is owned by Bedford Borough Council, and that they are clear and unencumbered. Further information is found in Appendix 3B.

### **3.3 Surveys and Investigations**

The development of initial options has taken into account pre-existing Asset Management Plan (AMP) data, record drawings and previous surveys and investigations.

These records have been supplemented by the additional surveys listed in the table below. The surveys have collateral warranties that are capable of being provided to the Framework Panel Member and to the Academy Trust.

Survey	Date Completed	Findings	Cost Implication (Yes/No)	Collateral Warranty Provided (Yes/No)	Location of Survey Report
Geotechnical	Dec-09	<p>The main findings of the report are that the site is covered with a layer of made ground averaging half a metre deep, on river gravel, which in turn rests on clay. The main affects on the design are as follows:</p> <ul style="list-style-type: none"> <li>• No gas protection is required</li> <li>• No major contamination is present</li> <li>• Shallow foundations may be possible, but the report suggests they might need to be coupled with ground stabilization.</li> </ul>	No	Yes	Appendix
Arboriculture	Dec-09	<p>The report has identified that there are no trees with tree preservation orders on the site. The most significant groups of trees are on the site boundary to Mile Road, the boundary between the School and the allotments, the boundary between the school and the playing field and in the courtyard between the school and Bunyan Centre.</p> <p>All of the trees which would be affected by the reference scheme are outside of the footprint of the proposed academy, and so with careful landscape design at bid stage it should be possible to mitigate the loss of trees.</p>	No	Yes	Appendix
Archaeological	Dec-09	<p>The report has identified that the site has been low lying farmland/flood plain throughout the historical record, with some minor finds from the Bronze Age and Roman periods. Some archaeological investigation has been undertaken wherever development has been undertaken in the immediate vicinity of the site, and so it is anticipated that further investigation will need to be agreed with the County Archaeologist.</p>	No	Yes	Appendix

Survey	Date Completed	Findings	Cost Implication (Yes/No)	Collateral Warranty Provided (Yes/No)	Location of Survey Report
Traffic	Dec-09	<p>Currently most pupils arrive at school by foot, but there is potential to increase cycling by the provision of better cycle routes and increased secure cycle parking at the school.</p> <p>Because of the controlled crossing, proximity of the entrance to the oat millers site and business park opposite, and the presence of two bus stops at the site entrance, the report has concluded that any alteration to the position of the main vehicle entrance to the site would be difficult to achieve.</p> <p>The report further concluded that the number of vehicle movements on and off site would not increase significantly and that the development should gain the support of Highways by implementing a robust travel plan.</p>	No	Yes	Appendix
Acoustic	Dec-09	The report identifies no significant noise generators around the site. The main noise generator is the traffic on Mile Road. The report recommends that it may be prudent to restrict new buildings to minimum distances from Mile Road. If buildings can be kept to at least 140m from Mile Road, noise levels are unlikely to exceed 58dB, which could be mitigated by glazing.	No	Yes	Appendix
Ecological	Dec-09	The proposed scheme would not result in any significant adverse ecological impacts. The proposals allow for the retention of the most valuable ecological features and no species of conservation concern are likely to be affected.	No	Yes	Appendix

Survey	Date Completed	Findings	Cost Implication (Yes/No)	Collateral Warranty Provided (Yes/No)	Location of Survey Report
Type 2 Asbestos	Dec-09	The John Bunyan School buildings were identified to contain asbestos, but this was mainly found in floor tiles, panel materials, and roof tiles, where it is unlikely to release fibres unless disturbed. Before demolition of the existing buildings a level 3 (intrusive survey) should be carried out, and all asbestos materials removed by UKAS certified and licensed asbestos removal contractors.	No	Yes	Appendix
Topographical	Dec-09	The survey indicates that the variation in topography across the site is just under a metre. The highest part of the site is the centre of the playing field at approximately 28.01m AOD.	No	Yes	Appendix
Utilities	Dec-09	There is no indication from these searches that there are gas mains, water mains, electricity mains or any drainage not serving the school running across the site.  It is believed that the existing school buildings obtain their heating from boilers within the Bunyan Sports Centre. Electricity and Gas mains appear to run on the opposite side of the road. There are likely to be private water connections into the site.	No	No	Appendix
Drainage	Dec-09	Existing drainage flows out to the road via the Bunyan Sports Centre. All of the drainage is relatively shallow, with most chambers being approximately 1m deep. It is unlikely that the existing drainage could be utilised for the academy due to its depth, condition and capacity. It is therefore recommended that the academy is provided with new drainage connections to Mile Road via the proposed new drive.	No	Yes	Appendix

### 3.4 Design Brief

The Design Brief has been developed and it reflects the Academy Trust's and Design User Group's aspirations expressed during the development of the initial options, design presentations and evaluation. The Design Brief contained within the OBC contains a summary identifying the design developments to date. This will be included within the Invitation to Tender (ITT) documents at the procurement stage, which will also include the Education Brief.

The Scheme will utilise the PfS Authority's Requirements, amended to suit the local circumstances.

#### ***Design Quality***

A number of measures of design quality will be used during the Academy development process. These will be linked to the Key Performance Indicator (KPI) and benchmarking data:

##### *Joined up design for academies*

The Academy Trust and LA are committed to the use of the Sorrell Foundation work throughout the design, build and operation of the projects. A Students' Brief has been published, which should be considered throughout the project. Furthermore, the students that participated in this work and others that are interested in the future will be involved in the development of the project through to its completion.

##### *Minimum Design Standards*

The sponsor is committed to achieving the best possible standards for the architecture of the new building and that it will be fit for purpose and has worked closely with the technical advisors and architects in developing the brief. The sponsor recognises the government's commitment to the quality of new schools through the adoption of the Minimum Design Standards and will ensure that the scheme meets the requirements set down by PfS and CABA. It will accordingly run a Minimum Design Standards Local Review workshop during the ITT period ensuring the scheme meets the CABA 10 points for a good school. The LA will recruit a suitably qualified facilitator in discussion with PfS to run the workshop and obtain the best feedback for bidders.

##### *BREEAM for Schools*

The requirement for a 'very good' BREEAM (Building Research Establishment's Environmental Assessment Method) score will be encapsulated within the procurement documentation upon which bidders' designs will be benchmarked. It will be a requirement for bidders to demonstrate during their design development that the required score can be met within the funding allowance.

##### *Sponsor Reference Group*

The Sponsor Reference Group is a consultative Group reporting to the Project Steering Group. The Group is required to consider issues referred to it by the PSG/DUG and, after appropriate consideration, to make recommendations to the PSG/DUG. It will be a particular concern of the Group to look outwards to the wider community. The group consists of staff, students, parents, governors, local representatives and other local stakeholders. Once the project enters procurement the SRG will be asked to meet with bidders to discuss proposals and provide feedback.

### **3.5 Construction Phasing**

The construction phasing and decanting strategy has been developed to a high level of detail. It considers options for the phasing of the construction works. The preferred option for construction phasing is detailed below:

- Phase 1: Safely establish construction site compound and construction access and construct the new Academy Buildings.
- Phase 2: Fit out, followed by safe decant to the new buildings and re-establish site compound and construction access for phase 3.
- Phase 3: Demolish existing John Bunyan Building & construct external landscaped areas. Safe decant from construction site by the contractor.

Within these three broad phases the successful contractor will require scope to develop its own phasing to suit operational requirements. The Caretakers bungalow and any connections by statutory undertakers have not been addressed by this outline phasing strategy.

At the time of writing the two most significant health and safety hazards are likely to be construction taking place adjacent to an active school building and demolition of the existing school buildings. Both of which can be mitigated through effective management.

Site access options have been discussed with the sponsors and their project managers. In considering the options for transition, the effects on pupils and staff of construction work and decanting have been taken into full account, with the aim of balancing the need to minimise both the cost of the decanting and the extent of the disturbance and disruption.

### **3.6 Decant Strategy**

Decanting arrangements from existing buildings will be organised by the Academy Trust. Prior to the final agreement of F&E schedules and ICT equipment, legacy audits will be undertaken to establish which materials can be transferred to the new buildings.

### **3.7 Health & Safety**

The Local Authority confirms that they recognise their statutory obligations under the Health and Safety at Work Act (1974) and the Construction (Design & Management) Regulations (2007). A CDM Co-ordinator will be appointed to the scheme to engage in the development of the design proposals. This role will continue throughout the development of the project in accordance with the obligations of the Client under the relevant legislation.

### **3.8 Carbon Reduction**

The DCSF expect carbon emissions from new school buildings to be reduced by 60% relative to those that are currently being constructed and that have been designed to 2002 Building Regulations. The target also includes emissions attributable to equipment used within the school.

The DCSF has identified the Bedford Academy project as a project which should be able to meet the above target and is eligible to receive additional funding to support the delivery of the 60% target reduction. Revisions to Part L Building Regulations

during 2006 require that some of this reduction is already being achieved, and further carbon savings will be achieved to achieve required BREEAM ratings.

The PfS FAM for this project includes an allocation of £561,924 to deliver the carbon reduction targets required by the DCSF.

The LA confirms that a requirement of the ITT submissions will be for the Panel Members bidding for this project to demonstrate that their proposals will achieve the 60% target within the overall funding allocation as described in this OBC.

The Carbon Calculator has been completed based on the control option/preferred option described in Section 3.1 and costed in section 6 and is contained in Appendix 3G. The Carbon Calculator will be revised by the Selected Panel Member and resubmitted at Final Business Case stage.

### 3.9 Third Party Agencies

The table below details all the current and proposed third party users on the site and identifies where they will be located once the building works have been completed.

Third Party	Current Users		Users once Building Works Completed			
	No. of Staff	Accommodation  (Location, no. of rooms, area of each room)	No. of Staff	Entrance Requirement	Accommodation  (Location, no. of rooms, area of each room)	Action Required  (formal agreement etc.)
Adult Education ICT suite		X38 area, separate external entrance				
Active Sports		F50, upstairs office by staff room				

### 3.10 Summary

The LA can confirm that they own the land upon which the Academy will be built and that there are no encumbrances or restrictive covenants that would place the development and operation of the Academy at risk.

A robust and thorough options appraisal has been carried out to determine the project proposals. The site options appraisals meet the requirements of Building Bulletin 98 and Building Bulletin 102.

Surveys and investigations have been undertaken and the results evaluated. Collateral warranties are in place for these surveys, with the objective that the Framework Panel Member can rely on their factual accuracy.

An initial control option for the Scheme has been prepared which demonstrates that the Scheme is deliverable. This initial control option has been signed off by the Design Group and PSG as meeting the requirements of the Education brief and Design Brief and as acceptable to all parties.

There is a commitment to implement the requirements of the Minimum Design Standard and a Local Review Design Workshop has been programmed for 3<sup>rd</sup> May 2010.

There is a commitment to achieving a BREEAM 'very good' rating.

The Design Brief has been developed. The Scheme will utilise the PfS Authority's Requirement document, amended to suit the local circumstances.

A construction phasing and decanting strategy has been developed.

The FAM for this project includes an allocation of £561,924 to deliver the carbon reduction targets required by the DCSF. The LA confirms that a requirement of the ITT submissions will be for the Panel Members to demonstrate that their proposals will achieve the 60% target within the funding allocation.

All existing and proposed third party users have been identified and there is a strategy in place for providing accommodation for these users where necessary.

The following documents are attached at **Appendix 3**

- 3A. Plan of the site to be transferred to Academy Trust
- 3B. Required Title Information
- 3C. Site options appraisals
- 3D. Collateral Warranties for surveys and investigations
- 3E. Design Brief
- 3F. Construction Phasing/Decant Strategy
- 3G. Initial Carbon Calculator

## 4 ICT

**Section 4 and Appendix 4** of this OBC provide an overview of the ICT Vision and the proposed delivery approach for the ICT provision. It encapsulates the preferred delivery method and validates the rationale for that choice, including how the service is intended to integrate with the wider LA provision.

The ICT capital budget for hardware (£1,450/pupil) is delivered to the Academy Trust, via the Local Authority, to procure an ICT solution.

Becta has reviewed and signed off the following key ICT documentation, as evidenced in the Becta support letter contained in Appendix 6H:

- ICT Vision
- ICT Output Specification
- Draft ICT Cost Model (revenue & capital)<sup>1</sup>
- ICT Risk Register
- Strategy for ICT Procurement

### 4.1 Options Appraisal

**Drafting Note:** This section should set out:

- The options that have been considered to deliver ICT within the school(s) project (for example a comprehensive fixed price lock-down managed service, managed service with various levels of service or an ICT contract for hardware, software and licences with maintenance agreements);
- The preferred option and rationale for the choice of this option (this will usually be comprised of a qualitative & quantitative options appraisal);
- The scope of services to be included in the ICT provision (e.g. infrastructure, learning platform and operational service) whilst also noting how the Becta framework will be utilised;
- Scalability of the ICT provision, which should include whether it is intended that the service provided to the school(s) is included within a future BSF Wave, whether it includes other schools in the LA or is applicable to the wider Local Authority.; and
- The consultation that has taken place with stakeholders on the proposed delivery model.

Creating and reviewing all the ICT options will help stakeholders understand the potential range of solutions that are possible and be clear that the selected service is most suitable for the circumstances. The output for this section will be very important to enable the affordability statements in Section 6, which should state whether stakeholders understand and agree to the financial commitments of the proposed provision.

Reference should be made to legacy ICT and ICT which is purchased for use within Academy before it opens in its new buildings

---

<sup>1</sup> It should be noted that HMRC has indicated that VAT is payable on ICT capital expenditure, regardless of who conducts the procurement, so VAT should be clearly identified and accounted for within the ICT Cost Model

## 4.2 Interoperability Proposals

**Drafting Note:** This section should set out the detailed proposals for ensuring that the interface between the Academy and the LA ICT services allows the smooth transfer of all user data (e-portfolio, or equivalent documents, and other personal data including assessment, attendance, SEN, School Action or behavior) between primary schools in the estate and the Academy to ensure students attending the Academy a seamless transfer between KS2 and KS3. The proposals should also set out the proposals for ensuring that the interface and interoperability between the Academy and LA ICT services facilitates continuity and collaboration in the delivery and access to 14-19 curriculum, including diplomas and projects with other schools, for the purposes of supporting student mobility around the estate.

## 4.3 Interface with Design and Construction Contract

The ICT procurement will be carried out through the BECTA framework. An ICT solutions Expression of Interest will be issued 15 months prior to build completion and a Supplier appointed 12 months prior to practical completion. The integrated project programme can be found in Appendix 2B.

The ICT development plan will follow the RIBA stages and interface with the Contractors Project Plan upon their appointment. ICT design elements will be agreed by RIBA stage D/E with all relevant service requirements designed into the scheme, i.e. server room and distribution housing requirements, along with the Cabling specification will be completed during RIBA stage D/E and will be available for inclusion into the contractor's package.

The interface of the two projects will be championed by Novatia who will also provide specialist support to the Academy Trust. The contractor's architects and M&E sub contractor will also have a role in this dovetailing and the outline roles and responsibilities of these teams are outlined below.

Novatia will act as the main ICT consultants within the project and will:

- Lead the Discovery, Design, Purchase and Implementation stages
- Translate all requirements for ICT on the building design to the Architects
- Produce all relevant planning documentation for the ICT solution
- Gain sign-off at each stage

The architects will:

- Incorporate ICT location requirements into the building design
- Agree fixed component locations
- Agree fixed components design/look

The M&E building services engineers will:

- Incorporate structured cabling containment in containment design
- Ensure sizing of containment and risers
- Incorporate Audio Visual (AV) containment in design
- Ensure effective heat loss/air con for ICT locations
- Provide Building Management System (BMS) information for building management technologies
- Ensure suitable ducting for ICT provision
- Ensure design provision of electrical power requirements for ICT components

The alignment of the two procurement processes for the ICT and the Design and Construction is highlighted as one of the top 10 risks to the Scheme.

#### 4.4 Summary

The Sponsor/Academy Trust has conducted a robust and thorough ICT options appraisal to determine the ICT approach.

Stakeholders been consulted in developing the ICT proposals.

The Sponsor/Academy Trust has confirmed that they will procure the ICT provision through the BECTA Framework.

BECTA has reviewed the proposed delivery approach for the ICT provision and confirmed that it is acceptable.

A detailed risk register for the ICT project been developed and a clear strategy to manage / mitigate ICT risks has also been put in place.

The ICT Output Specification also been completed to a satisfactory level

The following documents are attached at **Appendix4::**

4A. ICT Vision

4B. ICT Output Specification

4C. ICT Risk Matrix (identifying the top 10 risks)

4D. ICT Options Appraisal

## 5 FACILITIES MANAGEMENT

**Section 5** and **Appendix 5** of this OBC detail the proposals for the provision of Life Cycle and Hard FM.

The school currently pays in the region of £400,000 per annum for its Facilities Management (FM) and cleaning services, a breakdown of which can be found below.

	<b>Cost 2008/09</b>	<b>Estimated cost 2009/10</b>
Cleaning	£62,039	£70,423
Grounds Maintenance	£14,842	£14,842
Catering (net)	£44,462	£37,606
Building maintenance	£43,995	£31,637
Energy & Water	£70,051	£68,901
Site Management costs	£94,997	£93,904
Telephones	£12,064	£12,141
Broadband	£6,695	£6,896
Rates	£53,130	£55,775
Miscellaneous	£8,734	£6,833
<b>TOTAL</b>	<b>£404,314</b>	<b>£392,062</b>

Based on the project's location, completion date, square meterage and capital cost the BCIS FM and lifecycle model demonstrates an average annual commitment of £593,061. The Academy will be seeking to make additional savings once the new facilities are open due to the improved efficiencies of the buildings and re-negotiation of contracts. As a result the Academy would be able to cover the assumed FM costs within its current budget. Indeed, it is believed that some of the BCIS costs are higher than the school currently pays, specifically for site staff, making the project even more affordable.

The Academy Trust has confirmed that they will meet the expected costs for hard & soft FM and lifecycle replacement services from their available budgets (e.g. the General Annual Grant (GAG) and Devolved Formula Capital (DFC)). The Academy is committed to making on-going savings and will consider buying services from the Local Education Partnership once it is established, if these costs will offer better value for money for the school.

### 5.1 Summary

The Academy Trust has set out their strategy for delivering life cycle and hard FM services and confirmed that once the LEP has been established that they will consider buying these services from the LEP.

The Sponsors/Academy Trust has confirmed that they will meet the expected costs for hard FM and lifecycle services from their available budgets.

The following documents are attached at **Appendix 5**:

- NOT USED

## 6 AFFORDABILITY

**Section 6** and **Appendix 6** of this OBC describe the affordability position for the whole Scheme.

### 6.1 Design and Construction

The cost plan below demonstrates that the scheme is affordable. As the proposed option provides 100% new build it will attract additional carbon funding, which is reflected in the table.

The costs have been prepared on the basis of the drawings prepared by Conran and Partners and agreed by the Design User Group.

Category	FAM	LA Estimate	Variance
Construction Costs	15,517,303	15,517,303	-
External Works	1,862,076	1,862,315	239
Abnormals	775,865	775,378	(487)
Professional Fees	2,269,406	1,969,406	(300,000)
FFE	1,754,738	1,754,738	-
ICT Infrastructure	324,000	324,000	-
Carbon Reduction	561,924	561,924	-
Inflation at start date	(366,910)	(366,905)	5
<b>D&amp;B Contract Total</b>	<b>22,698,402</b>	<b>22,398,159</b>	<b>(300,243)</b>
Project Support Funding	-	300,000	300,000
ICT Hardware	2,088,000	2,088,000	-
<b>Total Project Value</b>	<b>24,786,402</b>		<b>(243)</b>

The cost estimate makes allowance for the sum of £300,000 for Project Support Funding for delivery costs. The LA has submitted their application for Project Support Funding and it has been approved by PfS.

### 6.2 Abnormal Costs

During the development of the initial designs, the LA has undertaken surveys and investigations and considered the results. The abnormalities identified have been costed and the costings agreed with PfS. The abnormal costs are summarised in the table below.

Abnormal	LA Estimate
Demolition	372,000
Break up of roads	108,500
Asbestos survey and removal	51,500
Foundations	121,500
Above including overhead profit, preliminaries and contingency	121,878
<b>Total</b>	<b>775,378</b>

### 6.3 ICT

The following table sets out the expected ICT capital costs for the project.

<b>Costs</b>	
Network - Core	£37,964
Network - Edge	£88,266
Network - Management	£2,500
Cabinets	£10,000
KVM	£2,500
UPS	£24,200
Patch Leads	£12,970
Servers	£75,000
WiFi	£113,100
Printing	£53,850
Telephony	£38,255
Staff and Student Computers	£415,050
Classroom Audio Visual Equipment	£174,950
Learning and Teaching Peripherals	£137,850
Public Space Equipment	£52,000
Media Delivery Solution	£113,500
Video Conferencing	£8,400
Integrated ID system	£148,127
Software	£173,734
Consumables	£6,000
Training	£30,000
Maintenance and Support	£40,000
Installation	£215,115
Project Management	£75,000
<b>Total</b>	<b>£2,048,331</b>

As the exact specification of the ICT solution is as yet unknown it is not possible to detail the exact revenue costs for the project. However, an outline analysis has been undertaken, which indicates an average annual ICT revenue cost of **£tbc**.

The Academy is committed to purchasing a solution that offers value for money and is viable for the long term. Therefore, any solution will need to be affordable within the Academy's predicted revenue budget.

#### 6.4 Lifecycle/ FM costs

The Academy Trust is committed to maintaining the new Academy buildings in accordance with the estimates below. A letter of commitment to Hard FM and Lifecycle standards and costs is included within Appendix 6.

Indicative Lifecycle, Utilities, Hard and Soft FM costs over a 25 year straight line period are tabulated below:

<b>Element</b>	<b>Cost Estimate (£) per sq m</b>	<b>Cost Estimate (£) 25 years</b>	<b>Cost Estimate (£) per annum</b>
Lifecycle Costs	16.76	5,139,454	205,578
Hard FM	8.28	2,539,062	101,562
Soft FM	15.6	4,783,740	191,349
Utilities	7.71	2,364,271	94,570
<b>Total</b>	<b>48.35</b>	<b>12,826,527</b>	<b>593,061</b>

These figures are based upon a GFA of 12,266m<sup>2</sup>

#### 6.5 Other sources of funding

No other monies are being sought for this project.

## 6.6 Summary

The OBC provides a separate cost estimate reconciled against the FAM for both the design and build and ICT elements of the project.

The estimate indicates that the proposals are affordable within the funding allocation.

This section of the OBC confirms the Local Authority's view that the construction scheme represents value for money.

The LA has submitted their application for Project Support Funding and it has been approved by PfS.

The Sponsor and the LA accept that they have to deliver the Academy building within the agreed funding envelope and they will ensure that the scope of the development work fits within this envelope with due reference to the Framework rates. The Sponsor and the LA will work with the Framework Panel Members to optimise the scope and will undertake any project re-scoping necessary to ensure that the project fits within the funding envelope

### ***Design and Construction***

The initial design option for the Scheme has been fully costed. The cost estimate includes an assessment of likely abnormal costs resulting from the initial site investigations that have been carried out and an assessment of the external works costs based on the agreed control option

The capital costs fit within the Funding Allocation Model (FAM) agreed with PfS.

### ***ICT***

The OBC sets out the cost per pupil in relation to a learning environment, managed service platform.

*Capital Costs* - The initial design options for the Academy have been fully costed and the identified what is to be delivered through the £1450/pupil funding.

We can confirm that the capital costs fit within the Funding Allocation Model (FAM) agreed with PfS.

*Ongoing Costs* - ICT costs have been estimated for a 5 [or 10] year period. The estimated annual cost is [ ] per pupil per annum, £[ ] in total per annum and the Sponsor/Academy Trust has confirmed his commitment to meeting these costs through the General Annual Grant (GAG).

### ***Facilities Management***

Life Cycle and Hard FM costs have been estimated for a 25 year period. The Sponsor/Academy Trust has confirmed their commitment to meeting these costs through their existing budget sources such as the General Annual Grant (GAG) that will be received. The Soft FM and Utilities costs have been estimated over 25 years and these costs have been provided to the Academy for budgetary purposes

The following documents are attached at **Appendix 6**:

- 6A. PfS Funding Allocation Model
- 6B. LA Cost Estimate
- 6C. Schedule of Abnormal Costs
- 6D. Facilities Management Cost Estimate
- 6E. ICT Cost Model (revenue & capital)
- 6F. A letter from the Section 151 Officer confirming the affordability of the Scheme
- 6G. A letter from the Sponsor/Academy Trust confirming their commitment to investment in life cycle and hard facilities management costs based on estimates
- 6H. Letter from Becta confirming that the key ICT deliverables and costings have been reviewed and are acceptable
- 6I. A letter from the Sponsor/Academy Trust confirming their commitment to investment in ICT

## 7 READINESS TO DELIVER

**Section 7** and **Appendix 7** of the OBC sets out the LA's project management structure and identifies the roles and responsibilities of each part of the structure. The key members of the team and the external advisers are named and information is provided on their skills, experience and time commitment to the project. This section also sets out the approved budgets (including consultant advisory fees) and the delegated authorities given to a named senior officer within the key stakeholders.

### 7.1 Project Management

The LA has established and maintained a fully resourced project management regime for the successful delivery of the Scheme.

Role on Project	Position	Name	Time Commitment (days/month)
Owner	Executive Director for Children's Services, Schools and Families	Chris Hilliard	0.5
Project Director	Assistant Director (School Organisation and Planning)	John Goldsmith	3
Project Manager	Senior Education Officer (Planning)	Andy Tompkinson	5
Technical Advisors	Aecom	Ben McCarthy	10
LA Design Champion	Head of Property Services	David Joyce	0.5
ICT Advisers	Novatia		

The relevant skills and experience of the key members of the team are detailed below:

Name	Experience
Chris Hilliard	Experience in local authority planning and managing buildings projects, as a secondary headteacher and in the Government Office
John Goldsmith	Experience of managing building projects, the procurement and delivery of a PFI project and of working on preparations for BSF within the Local Authority.
Andy Tompkinson	PFI, Academy and BSF project management within Local Authorities
Ben McCarthy	Considerable experience of Academy and BSF procurement.
David Joyce	Over 30 years experience in the management of and development of land and property on behalf of local government, the majority of which has been at a senior management level.

The Sponsor/Academy Trust and LA, in conjunction with the Department for

Children, Schools and Families (DCSF), has followed the project structure and governance for National Framework Academy projects established by PfS, which includes the creation of a Project Steering Group, a Design Group and the LA Project Team.

Resources were engaged to undertake the site options appraisal and collate the OBC. These appointments were made via the PfS Programme and Project Management and Technical Advisor Frameworks.

In addition, PfS has provided support during the project development, and has monitored progress to ascertain whether the requirements of the new Academies Framework have been met. The PfS Project Director is Crawford Wright..

The budget for the procurement and delivery phases of the budget has been approved and authority has been delegated as follows:

- to the Assistant Director (School Organisation and Planning) having delegated powers to make any necessary reasonable alterations to the Outline Business Case, following discussions with Partnerships for Schools in order to get agreement to the Outline Business Case.
- to the Assistant Director (School Organisation and Planning) having delegated powers to approve a shortlist of contractors to develop proposals for the new facilities, following the procurement process set out by the National Contractors' Framework.
- to the Assistant Director (School Organisation and Planning) having delegated powers to approve a Preferred Bidder to develop proposals for the new facilities for submission to planners, following the procurement process set out by the National Contractors' Framework.

The LA will use the agreed project Support Funding to pay for the resource and other options appraisal costs and the LA confirms that it will meet the costs of any overspend above the agreed £300,000 sum.

The LA has confirmed their arrangements and budgets for administering and monitoring the Design & Build Contract during the Contract Period.

Item	Budget (£)			
	2009/10	2010/11	2011/12	Total
Staffing				
External Support				
Project Direction & Support	£55500	£98442	£82943	£236885
Legal Advisors	£1000	£1000	£500	£2500
Quantity Surveyor		£18600		£18600
Internal Staff				
Project Director	£16000	£16000	£16000	£48000*
Project Manager - Education	£14000	£14000	£14000	£42000*
Admin Support	£2000	£2000	£2000	£6000*
Internal Departments				
Design & Property Services	£2500	£2500	£2500	£7500*
Procurement Team	£500	£500		£1000*
Non Staffing Costs				
Office Expenses	£100	£100	£100	£300*
Travel	£200	£200	£200	£600*

Disconnection of services etc			£5000	£5000
Surveys				
Acoustic	£1390			£1390
Archaeological	£1775			£1775
Asbestos Type II	£5545			£5545
Ecological & Bat	£2420			£2420
Flood risk	£4250			£4250
Geotechnical	£11194			£11194
Topographic & Drainage	£5975			£5975
Transport survey	£3072			£3072
Arboriculture survey	£1395			£1395
<b>Total for surveys</b>				<b>£37016</b>
<b>TOTAL COST</b>				<b>£405100</b>
<b>TOTAL (excluding items funded from existing resources)</b>				<b>£300000</b>

\* These items are funded from existing Council resources

## 7.2 Consultation and Statutory Approvals

The following consultation has taken place in relation to the Scheme:

Planning	<p>The Project Team has liaised with the Local Planning Authority. No key planning concerns have been identified:</p> <p>The following has been obtained:</p> <p>Letter of Comfort confirming that consultation has been undertaken on the proposals and there are no material objections to the preferred option.</p>
Sport England	<p>The team has contacted Sport England with regards to the proposals and a letter of support has been received, with no material objections to the preferred option</p>

## 7.3 Market Testing

The LA has contacted the Framework Panel Members and a Bidder day was held on 14<sup>th</sup> December 2009. The event was attended by eleven of the Framework Panel Members.

The feedback received was that all attending bidders were interested in the scheme and would be likely to submit a PITT response.

## 7.4 Risk

A risk workshop was held on 2<sup>nd</sup> September 2009 and a risk strategy developed. This risk register is reviewed on a regular basis.

The Risk Register details:

- The risks identified
- Who is responsible for the mitigation
- Measures being taken to mitigate each risk

## 7.5 Summary

The Sponsor/Academy Trust and LA, in conjunction with the Department for Children, Schools and Families (DCSF), has followed the project structure and governance for Contractor's Framework Academy projects established by PfS, which includes the creation of a Project Steering Group, a Design Group and the LA Project Team.

The LA has put in place resources for the duration of the project, including post contract, to monitor and maintain ongoing relations with the Framework Panel Member and ensure that performance is continually reviewed.

The LA has contacted the Framework Panel Members and a Bidder day was held on 14<sup>th</sup> December 2009. The event was attended by eleven of the Framework Panel Members.

A risk workshop has been held and a risk strategy developed.

The following documents are attached at **Appendix 7**:

- 7A. Budget for procurement and delivery
- 7B. Outline Planning Permission/Planning Brief/Letter of comfort from the Planning Authority
- 7C. Letter from Sport England
- 7D. Consultation report
- 7E. Risk Register (detailing top 10 risks)

## 8 MOVING FORWARD

**Section 8** and **Appendix 8** includes the benchmarking data collected at this OBC stage and confirmation that the documents required for the procurement process have been developed.

### 8.1 Preparation for Procurement

In parallel with the work required to complete this OBC, the LA Project Team has also been developing the documents required for the procurement process. The following documents are ready for issue to the Framework Panel Members:

- Preliminary Invitation to Tender (PITT), including the evaluation matrices; and
- Draft Invitation to Tender (ITT), including the evaluation matrices.

In addition, the evaluation team has been established and briefed.

### 8.2 Summary

A critical review of the options appraisal has been conducted and the benchmarking data needed by PfS has been provided.

The LA Project Team has developed the PITT, draft ITT and associated evaluation matrices and are ready to engage with the Framework Panel Members.

The evaluation team has been established and briefed.

The following documents are attached at **Appendix 8**:

8A. OBC Required KPI data

## **DOCUMENTS TO BE INCLUDED WITHIN THE APPENDICES**

### **APPENDIX 1 – OVERVIEW AND COMMITMENT**

- 1A. Education Brief, including the Curriculum Model and Accommodation Schedule that demonstrates an area within the BB98 gross internal floor area allocation
- 1B. Letter from the DCSF confirming that the Education Brief and Accommodation Schedule have been approved
- 1C. A letter of support from the Sponsor/Academy Trust
- 1D. A letter of support from the LA
- 1E. Papers and minutes of LA Cabinet meetings confirming support for the project
- 1F. Memorandum of Understanding
- 1G. Confidentiality Agreement for the release of information relating to the PfS Contractors Framework.
- 1H. Confirmation of School Closure

### **APPENDIX 2 – PROCUREMENT STRATEGY**

- 2A. A detailed programme of work (Gantt chart, including ICT development and procurement)
- 2B. Evaluation undertaken to select Sample Schemes

### **APPENDIX 3 – BUILDING DESIGN AND CONSTRUCTION**

- 3A. Plan of the site to be transferred to Academy Trust
- 3B. Required Title Information
- 3C. Site options appraisals
- 3D. Collateral Warranties for surveys and investigations
- 3E. Output from DQI Workshop
- 3F. Design Brief
- 3G. Construction Phasing/Decant Strategy
- 3H. Initial Carbon Calculator

### **APPENDIX 4 – ICT**

- 4A. ICT Vision
- 4B. ICT Output Specification
- 4C. ICT Risk Matrix (identifying the top 10 risks)

### **APPENDIX 5 - FACILITIES MANAGEMENT (NOT USED)**

### **APPENDIX 6 - AFFORDABILITY**

- 6A. PfS Funding Allocation Model
- 6B. LA Cost Estimate (for refurbishments and external works we expect costs to be built up from base costs & reflect the preferred/control option)
- 6C. Schedule of Abnormal Costs
- 6D. Facilities Management Cost Estimate
- 6E. ICT Cost Model (revenue & capital)
- 6F. A letter from the Section 151 Officer confirming the affordability of the Scheme
- 6G. A letter from the Sponsor/Academy Trust confirming their commitment to investment in life cycle and hard facilities management costs based on estimates
- 6H. Letter from Becta confirming that the key ICT documentation & costings have been reviewed and are acceptable
- 6I. A letter from the Sponsor/Academy Trust confirming their commitment to investment in ICT

### **APPENDIX 7 - READINESS TO DELIVER**

- 7A. Budget for procurement and delivery
- 7B. Outline Planning Permission/Planning Brief/Letter of comfort from the Planning Authority
- 7C. Letter from Sport England
- 7D. Section 77 Approval
- 7E. Consultation report
- 7F. Risk Register

### **APPENDIX 8 - MOVING FORWARD**

- 8A. OBC Required KPI data