

# Detailed Business Case

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### a. Title

Project Name	Expansion of Russell Lower School, Ampthill
Project location	Russell Lower School, Ampthill
Project Sponsor	Rob Parsons Head of School Organisation, Admissions and Capital Planning
Directorate	Children's Services
Type of scheme	Capital Project - over £60k
Funding	External

### b. Project Information

Project Purpose/ Outline Description	<p>This project is to provide required additional lower school places in Ampthill as a result of local housing development and a forecast shortfall in school places. The preferred provider for these new school places is Russell Lower School and the Executive report accompanying this business case set's out the proposal to expand the school and the statutory process that has been followed to bring this proposal to the Executive for determination.</p> <p>The development of approximately 410 additional houses at Warren Farm to the South of Ampthill requires the expansion of one of the existing Lower Schools by an extra 150 places, i.e. to a total of 450 places by September 2015.</p> <p>Russell Lower School is one of two lower schools in the local area; the other being The Firs Lower School, adjacent to Alameda Middle School. An options appraisal was undertaken by David Turnock Architects in Autumn 2012 to determine which school was the preferred site for expansion. The appraisal used an objective scoring mechanism which looked at the existing buildings and layout, site constraints, cost of expansion and impacts on neighbours and traffic, using two potential designs for each school.</p> <p>Expanding other schools outside of the local area has been discounted as places would not be provided in the area of need to meet the additional demand.</p> <p>The options appraisal report concluded that Russell Lower School was the preferred school to provide the additional pupil places. This decision was supported by the Central Bedfordshire Council and the school in November 2012.</p>
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	<p>Russell Lower School is a community school in Ampthill. It admits children from Reception Year to Year 4. The school has seen a gradual increase in pupils over the last few years. The school currently has an admissions limit of 54 pupils in each year, although the school has a total capacity of 300 pupils overall. In November 2012, there were 244 pupils on roll.</p> <p>The proposed expansion will enlarge the school's capacity from its current level of 300 places to 450 places by September 2015.</p> <p>Most children attending the school typically transfer to Alameda Academy (a middle school) at the end of Year 4. The school has close links to both Alameda Middle School and other local lower schools: The Firs and Maulden Lower.</p> <p>Ladybird Pre-School, is a privately run pre-school which occupies a separate building on the school site but should not be affected by the development at the school.</p> <p>The project will include project management and delivery of the capital scheme under the supervision of the Council and the school's professional consultants.</p>
Out of scope/ exclusions	All necessary elements are covered within the scope of the project.

### c. Deliverables / outputs

Deliverables:

Deliverable	Date Due
New and remodelled school buildings to provide a total of 450 places by September 2015.	September 2015

### d. Options Appraisal

Options	<p>An option appraisal was carried out, followed by a full feasibility study which was signed off by all parties in August 2013. The feasibility has addressed key concerns in terms of accommodation needs and site constraints wherever possible and has also considered other existing but potentially urgent maintenance needs which will be funded through the 2014/15 Children's Services capital maintenance programme.</p> <p>The accommodation schedule reflects the curriculum analysis, school organisation plan and BB99, the DfE guidelines for a primary school</p> <p>The Education Brief, including curriculum model and accommodation schedule, which formed the basis of the feasibility, was signed off by the PSG and LA.</p> <p>The Design Brief reflects the School's vision.</p> <p>The design team were provided with a copy of the CBC sustainability brief/environmental strategy as part of the overall briefing process.</p>
Implications of "do	The Council would fail in its statutory responsibility (Section 14 of the Education Act 1996) which places a duty on Councils to secure sufficient and suitable school

nothing”	<p>places for pupils in its area.</p> <p>If the project is not approved to go ahead, the Council will not be able to provide sufficient lower school places in the Ampthill area once the agreed housing development is complete.</p> <p>Once all schools are oversubscribed in this area, families moving into the new houses would be required to transport their children to other locations in rural mid-Bedfordshire, causing an increase in children being driven to school.</p> <p>If the specific expansion of Russell Lower School was refused, another school in the local area would have to be reconsidered for expansion. However these schools were ruled out in the early planning stages due to their unsuitability on the basis of location, physical ability to expand on site and potential traffic issues.</p>
Project Delivery/ Project Approach	<p>The school has previous experience of managing build projects at the school through the use of the CBC School Notifiable Project route, including the creation of a new 2 classroom block.</p> <p>However, this new build and alterations are on a much larger scale and the school will be supported by a full Design Team, Project Management support from CBC Property and Assets and Client support from CBC Children’s Services. The school is also being supported in its bid for additional revenue support for the project through the Schools’ Forum Growth Fund which will enable the school to recruit additional staffing and support throughout the project which will provide additional resources to enable them to devote time and resources to the scheme. In particular, the school is looking to recruit a Deputy Head as soon as possible so that Management responsibilities can be shared amongst senior staff.</p> <p>The project is being supported and Governed through a Project Team which is led by the CBC Project Manager. Regular meetings are being held to progress the design with key milestones outlined for the project. A Communication Plan has also been developed to ensure appropriate and clear lines of communication, decision making and responsibilities. For the school this will require a single point of contact throughout the project. In terms of wider reporting, this will be via monthly monitoring meetings between CBC Property and Children’s Services staff with formal minutes of the meetings reported within both services and reflected in the CBC Children’s Services monthly project monitoring and capital reporting.</p>
Dependencies	<p>Russell Lower has for many years maintained a reputation as a caring school with high standards in all aspects. This was endorsed recently in its last Ofsted inspection and in its continued high academic standards. The success of this project will be based on:</p> <ul style="list-style-type: none"> <li>• An efficient and phased construction which considers the schools needs and concerns to reduce the disruptive effect of the build.</li> <li>• The expanded school opening on time in September 2015.</li> <li>• The consideration and establishment of a clear and transparent Admission Criteria for the school as a whole.</li> <li>• Continued high performance at the end of the EYFS, Key Stage 1 and Year 4.</li> <li>• The schools’ ability to recruit and retain highly skilled practitioners in all roles.</li> </ul>
Constraints	<p>The new facilities are required to be ready for occupation for the 2015/16 Academic year.</p>
Assumptions	<p>There are no assumptions being made in the development of this project which will also be subject to appropriate risk management strategies.</p>
Procurement	<p>The project is to be traditionally designed and procured under a JCT Intermediate</p>

route/options	contract with a Bill of Quantities.
<b>Assessment of preferred option</b>	
Expected Benefits (opportunities) of this project	<p>Expansion of Russell Lower School supports Council and Services priorities in the following ways:</p> <p><u>Statutory Duty</u> This project will ensure the Council continues to meet its statutory obligations to provide sufficient school places and also meets the legal requirements placed on the Council by the Education and Inspections Act 2006 regarding proposals to expand maintained schools.</p> <p><u>Link to New School Places Programme, School Organisation Plan, CBC Education Vision</u> The School Organisation Plan 2012-2017 identifies a requirement to increase pupil place provision in Amptill area lower schools from 2015/2016, which translates to the identification of £3.1m funding for 150 additional lower school places in the Redborne area by September 2015, as confirmed in Appendix C of the New School Places Programme 2013/14 to 2017/18 (agreed at Executive in Feb 2013).</p> <p>To support the Council's Educational Vision, the school has prioritised the way it works together to optimise learning; Early Intervention, Commissioning and Partnerships.</p> <p>At Russell Lower School it is recognised that Early Intervention is essential. Using a variety of programmes and ensuring that these are delivered by capable staff in a nurturing environment has a positive impact on the child's progress. Working effectively with multi-agencies and sharing good practice ensures that children are given the very best chance to reach their full potential. This build will enable the school to further develop partnerships with local schools and the community.</p> <p><u>Alignment of School's Educational Vision against CBC's Policy Planning Principles for the Provisional of School Places</u> Russell Lower School is an expanding school that enjoys a very good local reputation.</p> <p><u>Standards</u></p> <ul style="list-style-type: none"> <li>• The school achieves extremely high standards and provides exceptionally good care for the children.</li> <li>• The school believes that the children and their development are paramount. The school is passionate about enhancing each child's knowledge, skills and understanding to enable them to become more confident, successful, active and responsible.</li> <li>• In addition to the National Curriculum, children are given diverse opportunities in music, art, sport and languages. The school has recently introduced the Creative Curriculum. Children experience many diverse experiences in their education at Russell.</li> <li>• The school encourages children to stay safe, to be healthy, to enjoy, to achieve and to make a positive contribution.</li> </ul> <p><u>Continuity of Provision</u></p> <ul style="list-style-type: none"> <li>• It is imperative that all children within the school's catchment area have the same entitlement.</li> <li>• The school works closely with all the schools and playgroups in the area to</li> </ul>

	<p>ensure that the children have continuity and a seamless transition to their next school.</p> <ul style="list-style-type: none"> <li>• Schools should be based around communities and the needs of their children.</li> <li>• The school operates an ‘Open Door Policy’, where parents are encouraged to become involved with the school and their child’s education.</li> <li>• Ofsted said of the school, ‘Pupils’ contribution to the school and wider community is outstanding. They are very proud of their school and value it a great deal.’</li> </ul> <p><u>Alignment to CBC headline priorities, in particular Improved Educational Attainment and Promoting Health, Wellbeing and Protecting the Vulnerable</u></p> <p>The school was awarded ‘Healthy Schools’ status in 2005. The school works alongside the Redborne Sports Partnership and other local providers to ensure that Russell Lower children have the best chance to make healthy life choices.</p> <p><b>DIRECT BENEFITS TO THE SCHOOL</b></p> <ul style="list-style-type: none"> <li>• The expansion of Russell Lower School will enable children from the local area to attend a local school.</li> <li>• Sufficient lower school places being provided for families due to the rapid expansion and builds in the town of Ampthill.</li> <li>• An enlarged staff will bring fresh ideas, new skills and talents.</li> <li>• Economies of scale will enhance pupil to teacher/adult ratio.</li> <li>• The enlarged accommodation will provide designated areas for SEN, further hall space, dining area and extra storage.</li> <li>• The reconfiguring of the hall, offices, staffroom and reception area will enhance the working environment and improve facilities.</li> <li>• A restructured leadership team will help to retain and attract staff.</li> </ul> <p><b>WIDER BENEFITS TO THE COMMUNITY</b></p> <p>As well as specific educational benefits, the project will have other considerable benefits to the local community:</p> <ul style="list-style-type: none"> <li>• An enlarged hall will enhance PE provision and provide spaces for community activities.</li> <li>• A separate dining area will enable the school to expand its ASC and help parents by providing wrap around care.</li> <li>• The configuration of toilets and cloaks will enable these to be available to community users of the playing fields without requiring the whole school to be open or heated.</li> </ul>
<b>Impact Assessment of preferred option</b>	
Employee implications	As an expanding school, there will be a need to increase the number of teaching and non-teaching staff to support the increase in pupil numbers. This will be funded by the increased revenue budget the school will receive from the Council in the short term and the Education Funding Agency in the long term.
Equalities Issues	No equalities issues are expected to arise as a consequence of the development. Indeed, the project intends to overcome any perceived inequalities by providing local places for local pupils. No pupils will be displaced by the proposals.
Other impacts	None
<b>Strategic Assessment of preferred option</b>	

Statutory Duty & any legal implications	Section 14 of the Education Act places a duty on Councils to secure sufficient and suitable school places for its area. The Education and Inspections Act 2006 gives councils a strategic role as commissioners, but not providers, of school places to promote parental choice, diversity, high standards, the fulfilment of every child's educational potential and fair access to educational opportunity.																																																																																		
KPIs and key targets from MTP	The project supports Central Bedfordshire's medium term plan: Delivering your priorities – our plan for Central Bedfordshire 2012-2016 and the specific priority of improved educational achievement. The project will also assist the Council to manage growth effectively.																																																																																		
Impact on the MTP – delivering your priorities	<p>The school was rated 'Good' with 12 Outstanding features by Ofsted during the last inspection in November 2011.</p> <p><b>Key Stage 1:</b> 54 pupils (28 boys; 26 girls): <b>Summary:</b> Well above average standards; good progress</p> <table border="1" data-bbox="437 589 1482 898"> <thead> <tr> <th rowspan="2">Table 3 KS1 Attainment</th> <th colspan="2">2011</th> <th colspan="2">2012</th> <th colspan="2">2013</th> </tr> <tr> <th>School*</th> <th>National*</th> <th>School*</th> <th>National*</th> <th>School*</th> <th>National</th> </tr> </thead> <tbody> <tr> <td>Reading</td> <td>17.8</td> <td>15.7</td> <td>18.1</td> <td>16.0</td> <td>18.0</td> <td></td> </tr> <tr> <td>Writing</td> <td>17.3</td> <td>14.4</td> <td>16.7</td> <td>14.7</td> <td>17.0</td> <td></td> </tr> <tr> <td>Mathematics</td> <td>17.6</td> <td>15.7</td> <td>17.3</td> <td>15.9</td> <td>17.2</td> <td></td> </tr> <tr> <td>All subjects</td> <td>17.6</td> <td>15.3</td> <td>17.4</td> <td>15.5</td> <td>17.4</td> <td></td> </tr> </tbody> </table> <p>*Reported scores (not TA)</p> <p><b>Year 4:</b> 48 pupils (26 boys; 22 girls): <b>Summary:</b> High standards; good progress</p> <table border="1" data-bbox="430 994 1490 1238"> <thead> <tr> <th rowspan="2">Table 5 Y4 Attainment</th> <th colspan="2">2011</th> <th colspan="2">2012</th> <th colspan="2">2013</th> </tr> <tr> <th>School</th> <th>LA</th> <th>School</th> <th>LA</th> <th>School</th> <th>LA</th> </tr> </thead> <tbody> <tr> <td>Reading</td> <td>23.5</td> <td>23.4</td> <td>23.6</td> <td>23.6</td> <td>24.4</td> <td></td> </tr> <tr> <td>Writing</td> <td>22.5</td> <td>21.8</td> <td>23.0</td> <td>21.9</td> <td>23.9</td> <td></td> </tr> <tr> <td>Mathematics</td> <td>23.1</td> <td>22.4</td> <td>22.9</td> <td>22.6</td> <td>24.0</td> <td></td> </tr> <tr> <td>All subjects</td> <td>23.1</td> <td>22.5</td> <td>23.2</td> <td>22.7</td> <td>24.1</td> <td></td> </tr> </tbody> </table>	Table 3 KS1 Attainment	2011		2012		2013		School*	National*	School*	National*	School*	National	Reading	17.8	15.7	18.1	16.0	18.0		Writing	17.3	14.4	16.7	14.7	17.0		Mathematics	17.6	15.7	17.3	15.9	17.2		All subjects	17.6	15.3	17.4	15.5	17.4		Table 5 Y4 Attainment	2011		2012		2013		School	LA	School	LA	School	LA	Reading	23.5	23.4	23.6	23.6	24.4		Writing	22.5	21.8	23.0	21.9	23.9		Mathematics	23.1	22.4	22.9	22.6	24.0		All subjects	23.1	22.5	23.2	22.7	24.1	
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Fit to the objectives of the Service	See Section above on expected benefits and links to the Council's Education Vision, the Policy Principles and the School Organisation Plan.																																																																																		
Fit to the objectives of the Capital Asset Management Plan (Capital Projects)	The project aligns with the Council's School Organisation Plan and the recently approved New School Places Programme 2012-17																																																																																		
<b>Key risks</b>																																																																																			
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	<ol style="list-style-type: none"> <li><u>Planning</u> On-going dialogue will be conducted with CBC planners to ensure that any application is received favourably. During the planning review period this relationship will be maintained to provide all necessary information to planners and to understand the implication of any conditions.</li> <li><u>Site conditions</u> A full suite of pre-design surveys has been carried out so that any issues regarding the site can be addressed during detailed design.</li> </ol>																																																																																		

	<p>3. <u>Programme</u> During the delivery of the project the programme will be closely monitored to ensure that milestones are achieved or where any delays are likely these can be minimised by deploying alternate strategies.</p> <p>A full risk register will be developed as the project progresses, using a recognised risk assessment methodology (eg RAG rating), which will be reviewed regularly by the Project Board and at the monthly monitoring meetings.</p>
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**f. Stakeholders involvement** – required to deliver or project will impact (please list with names of individuals and ensure that those who will be required to input or deliver the project are aware)

Directorates	Keith Armstead, Senior Education Officer, School Organisation, Admissions and Capital Planning Helen Konstantinidi, Project Manager, Property & Assets
Members	
Public if applicable	

**g. Timescales – key milestones**

Milestone	Start date	End date
Executive approval to commence	December 2013	
Planning Period	December 2013	March 2014
Construction period	July 2014	July 2015
Project completion (end of defects liability period)	July 2016	

**h. Project Governance**

Please provide details of how it is proposed that this project should be governed, this should as far as possible be within existing governance structures.

<b>Project Sponsor</b>	Keith Armstead, Senior Education Officer (Planning), School Organisation, Admissions and Capital Planning
Project Manager	
Project Board (if known)	

**i. Costs**

Expenditure Type	£'000					Total
	Year 1	Year 2	Year 3	Year 4	Year 5	
Total Gross Capital Costs		140,554	1,447,876	1,535,369		3,123,799
Total Gross Revenue Costs						
<b>Total Costs</b>		140,554	1,447,876	1,535,369		3,123,799
<b>Projected Gross Benefits</b>	0	0	0	0	0	0
<b>Net Impact to CBC</b>	0	0	0	0	0	0

**2. Capital Costs**

A Expenditure Type	£'000						Est. Type *
	Year 1	Year 2	Year 3	Year 4	Year 5	Total	
<b>Capital Costs</b>							
Land Acquisition						0	
Building Acquisition						0	
Construction/ Conversion			1,332,318	1,352,318		2,684,636	D
Professional Fees		140,554	115,558			256,112	D
Vehicles						0	
Plant & Equipment						0	
Furniture				183,051		183,051	D
IT Hardware						0	
Software & Licences						0	
Capital Grant to 3rd Parties						0	
Credit Arrangements						0	
Capitalisation of Internal Salaries						0	
Other ( Specify)						0	
<b>Total Capital Costs</b>	0	140,554	1,447,876	1,535,369		3,123,799	D

\* S= Spot Estimate, D= Detailed Estimate, T= Tender Price.

B Sources of Funding	£'000					
	Year 1	Year 2	Year 3	Year 4	Year 5	Total
<b>External Funding</b>						
Government Grant (Basic Need)	532	185,833	1,360,233	1,535,369	-1,020,951	2,061,016
Section 106	11,968		29,864		1,020,951	1,062,783
Section 278						
Lottery/ Heritage						
Other Sources ( School funding)						
<b>Total External Funding</b>	12,500	185,833	1,390,097	1,535,369	0	3,123,799

Internal Funding						
Direct Revenue Financing						0
Capital Receipts						0
Borrowing						0
<b>Total Internal Funding</b>	0	0	0	0	0	0
<b>Total Funding</b>	12,500	185,833	1,390,097	1,535,369	0	3,123,799

**3. Revenue Costs**

Expenditure Type	£'000					
	Year 1	Year 2	Year 3	Year 4	Year 5	Total
<b>a. One - Off Revenue Costs</b>						
( Specify)						0
( Specify)						0
( Specify)						0
<b>Total One- Off Revenue Costs</b>	0	0	0	0	0	0

b. Ongoing Revenue Costs						
( Specify)						0
( Specify)						0
( Specify)						0
<b>Total Ongoing Revenue Costs</b>	0	0	0	0	0	0

c. Projected Gross Revenue Benefits/Savings						
Savings						0
Income						0
<b>Total Gross Revenue Benefits</b>	0	0	0	0	0	0

d. MRP and Interest						
MRP	0	0	0	0	0	0
Interest	0	0	0	0	0	0
<b>Total MRP &amp; Interest Impact</b>	0	0	0	0	0	0

<b>Net Impact to CBC</b>	0	0	0	0	0	0
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**Savings.**

Provide a detailed explanation of how the Savings and Income are Derived. Include details of how these have been calculated.

**4. Cost/ Benefit Analysis**

Additional Information	Value	
Net Present Value	0	3.5%
Return on Investment	-100%	Present Value Factor
Payback Period ( years)	#DIV/0!	( £'000)
Capital Costs to Benefits Ratio	#DIV/0!	
Revenue Costs to Benefits Ratio	#DIV/0!	
Total Costs to Benefits Ratio	#DIV/0!	

**5. VAT Implications**

Please state whether VAT implications have been considered for this scheme

**6. Additional Financial**

Include any additional financial information which may be relevant such as ;hyperlinks to grant conditions and details regarding funding sources.