

**Education Leeds**



**Leeds**  
CITY COUNCIL

# **Leeds Building Schools for the Future**

## **Phase 4 Leeds West Academy Project**

### **Outline Business Case**

**July 2009**

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## DOCUMENT CONTROL

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## EXECUTIVE SUMMARY

### Introduction

This Outline Business Case (OBC) has been prepared to appraise the viability of procuring a new build Academy which will be known as the Leeds West Academy on the site of Intake High School Arts College. This OBC outlines the options appraisal, cost estimates, affordability assessment and procurement strategy for the Leeds West Academy in sufficient detail to allow capital funding to be confirmed and gain approval to proceed with the delivery of the school via the New Projects Procedure (NPP) utilising the Local Education Partnership (LEP).

### Overview and Commitment

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

The proposal is for an 8 form entry Academy comprising of 1500 places, (1200 11-16 pupils and 300 post 16 places) on the site of Intake High Schools Arts College, Calverley Lane, Bramley, Leeds, LS13 1AH. The sponsor is the Edutrust Academies Charitable Trust (EACT), an education foundation and a registered charity, committed to promoting excellence in education under the leadership of Sir Bruce Liddington, the former Schools Commissioner for England.

The school is currently a specialist Performing Arts College and the sponsor has decided on English as the lead specialism with Performing Arts. By using the English specialism as a catalyst for academic and personal improvement, the Leeds West Academy will give priority to the significant improvement required in standards of literacy. This approach will be closely adapted to meet diagnosed individual needs of students. Links between English and other curriculum subjects will be established and embedded in order to reinforce knowledge, skills and understanding.

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 is currently showing a total area of 12,210m<sup>2</sup>. This is below the BB98 gross internal floor area stated in the Funding Allocation Model (FAM) which recommends an area of 12,754m<sup>2</sup>.

Leeds City Council's Project Team as well as EACT's Project Team are confident that the proposed Accommodation Schedule is sufficient to deliver the curriculum model to a very high standard.

Both EACT and Leeds City Council confirm their commitment to working together to procure the design and construction of the new Academy using the New Project Procedures process (NPP) with the LEP, which was established as a partnership to assist in the delivery of the Building Schools for the Future (BSF) Programme in Leeds. The Council confirms its commitment to utilising the standardised procurement documentation.

### **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 the design and construction of the Leeds West Academy and will be procured via the LEP. The LEP has sole and exclusive right to construct the Academy under the Strategic Partnership Agreement (SPA) signed on 3 April 2007 with Leeds City Council. The exclusivity afforded is dependent on the LEP successfully proceeding through two approval stages.

### **Design and Construction**

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

The location of the new build Academy will be on the existing school site but away from the current location of the school. The new buildings will respect the character of the adjacent neighbourhood and will be positioned to exploit both topography as well as the position of the existing large buildings to minimise their visual impact.

## 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.

EACT's vision for ICT is to support excellence in education for all by making state of the art technology fully accessible to stimulate creativity, collaboration, community involvement, efficient administration and personalised learning.

EACT will engage Research Machines Education Plc (RM), who is the council's existing ICT strategic partner, to provide the ICT provision for Leeds West Academy.

## Facilities Management

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

EACT will seek to provide its own life cycle and hard FM services and are committed to maintaining the buildings to a very high standard. EACT, through their Procurement Manager will look to gain value for money through economies of scale.

An indicative cost plan has been created detailing the anticipated FM costs over a 25 year period. This will be reviewed as the project progresses and the detailed design plans for the Academy are created.

## **Affordability**

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

The Academy will be procured through the LEP as a 100% new build using funding available from Partnerships for Schools (PfS). Leeds City Council will not be contributing to the capital cost of the project however will be accountable for ensuring that the project is delivered within the affordable envelope. The City Council has made a separate provision for off site highways works.

## **Readiness to Deliver**

**Section 7** and **Appendix 7** of the OBC sets out Leeds City Council'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 their position within the Project Team.

The Project Team for the Leeds West Academy has significant amount of experience gained from delivering Leeds' BSF projects as part of phase 1, 2 and 3. At the 2008 Excellence in BSF awards, Leeds' LEP which brings together Leeds City Council, Education Leeds, PfS and the Interserve led consortium Environments 4 Learning was named the 'best in the country'.

The Leeds West Academy project will be managed using the Delivering Successful Change (DSC) methodology which is Leeds City Council's corporate project management methodology.

## Moving Forward

**Section 8** and **Appendix 8 of this OBC** provide a critical review of the options appraisal through the completion of the PfS Checklist. Also included in this section is the benchmarking data collected at this OBC stage and confirmation that the documents required for the procurement process have been developed.

In parallel with the work required to complete this OBC, Leeds City Council's Project Team has also been developing the documents required to enter into Stage 1 of the NPP process.

# 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

The Leeds Strategic Plan 2008 to 2011 sets out the strategic outcomes Leeds City Council would like to see in people's lives and the city by 2011.

At the heart of the Leeds Strategic Plan is our ambition to transform the quality of life in Leeds to see:

- People happy, healthy, safe, successful and free from the effects of poverty
- Our young people equipped to contribute to their own and the city's future well being and prosperity
- Local people engaged in decisions about their neighbourhood and community and helping to shape local services
- Neighbourhoods that are inclusive, varied and vibrant offering housing options and quality facilities and free from harassment and crime
- An environment that is clean, green, attractive and above all, sustainable
- A city-region that is prosperous, innovative and distinctive enabling individuals and businesses to achieve their economic potential.

Our long and successful record of partnership working is a sure foundation for the delivery of these ambitious targets for Leeds. Leeds is one of only three authorities nationally to have been awarded Beacon status for the quality of partnership working.

Leeds City Council's vision for education, as stated in the Leeds Strategic Plan 2008 to 2011 is:

'An enhanced workforce that will meet future challenges through fulfilling individual and economic potential and investing in learning facilities'.

Leeds' vision for education is further split into the following improvement priorities:

- Enhance the skill level of the workforce to fulfill individual and economic potential
- Improve learning outcomes for all 16 year olds, with a focus on narrowing the achievement gap
- Improve learning outcomes and skill levels for 19 year olds
- Increase the proportion of vulnerable groups engaged in education, training or employment
- Improve participation and early learning outcomes for all children with a focus on families in deprived areas.

To realise its vision for education, Leeds City Council formed Education Leeds in April 2001, a not-for-profit organisation wholly owned by the Council. From 2001 to 2006, the company was a unique partnership between Leeds City Council and Capita and operated under direction from the Secretary of State for Education and Skills. Education Leeds had a five year contract with Leeds City Council making it responsible for providing all education support services that relate to children and young people of statutory school age. In April 2006 the Secretary of State withdrew their powers of direction and Leeds City Council decided to continue the contract with Education Leeds solely which ended the five year strategic partnership with Capita. The Chief Executive of Education Leeds is Chris Edwards.

Education Leeds' vision is:

'We want all children and young people to enjoy brilliant learning that gives them the skills, confidence, knowledge, understanding and skills to thrive and achieve their potential. We want all Leeds schools to be brilliant learning places – to be good schools, improving schools and inclusive schools where every child and young person can be happy, healthy, safe, successful and where no child is left behind'.

Education Leeds also has a vision for the future of secondary education which has itself been developed from the range of strategies, plans and policies being implemented to support secondary schools within the City. It sits within the context of the corporate vision to make Leeds a leading centre of learning, knowledge and research.

The overriding aim of Education Leeds is to ensure equality of access to a high standard of education for all children and young people and to make all schools good schools, improving schools and inclusive schools. The investment available through Building Schools for the Future programme has enabled Leeds to continue to:

- Strengthen the role schools play within their local communities developing the school's focus for community cohesion, lifelong learning and inclusive education
- Create and develop the scope for innovative and collaborative approaches thereby maximising potential opportunities for children and young people through a greater diversity of provision
- Provide better links between phases of education, improve and increase training and vocational pathway at age 14 to 19 and post 16
- Create flexible spaces that will allow innovation and thus inspire, celebrate and support new ways of teaching and learning
- Promote inclusive opportunities for all children providing appropriate facilities for children with Special Educational Needs
- Ensure efficient use of school buildings through a balance of supply and demand for school places and ensuring schools are equipped to accommodate new curriculum initiatives
- Meet local and national performance targets including best value
- Increase inclusive opportunities for all children, including those of all ethnic minorities and faith communities through a provision of specialist facilities where appropriate.

The City Council and Education Leeds are clear and share the same aspirations as Central Government that everyone in education has to raise expectations of what is possible for all young people to achieve by removing barriers to learning and transforming the quality of teaching and learning in schools. Leeds City Council and Education Leeds believe that that there should be equality of access to a high standard of education for all children and young people and that all Leeds schools should be good schools, improving schools and inclusive schools.

The Council can confirm that there are no changes to the scope of the project set out in the Expression of Interest dated 25 February 2008 which was approved by DCSF.

Intake High School Arts College serves an area with considerable potential however at the same time it also faces significant challenges. Pupils are drawn from the bottom third of the most deprived wards in the country, and the school site is similarly placed in the bottom third of deprived wards. 28% of students receive free school dinners, the Leeds average is 15.4% and the national average is 13.6%. The school is undersubscribed with an admission limit of 260 but only 164 students were admitted in September 2008; this is because a number of local families currently look elsewhere for secondary schooling.

Whilst GCSE performance across Leeds has seen an increase year on year, this has not been replicated at Intake High School Arts College where attainment is below the Leeds Average.

Below is a year on year comparison for GCSE attainment:

Educational Attainment	Leeds' Average	School's Average
GCSE 5 A*- C 2003	44.%	28%
GCSE 5 A*- C 2004	45.%	23%
GCSE 5 A*- C 2005	49.%	30%
GCSE 5 A*- C 2006	52.%	32%
GCSE 5 A*- C 2007	56.%	32%
GCSE 5 A*- C 2008	62.%	43%
GCSE (inc English & Maths) 2005	38.%	23%
GCSE (inc English & Maths) 2006	40.%	19%
GCSE (inc English & Maths) 2007	42.%	23%
GCSE (inc English & Maths) 2008	46.%	21%

In April 2004, Intake High School Arts College was made subject to special measures as the Ofsted Inspectors considered it did not provide adequate education for its students. It was re-inspected in January 2006 and removed from special measures but still continues to face challenging circumstances. It requires extensive support from Education Leeds and for this reason the school has entered into an extended partnership with Education Leeds. In September 2006, a new head teacher was appointed who along with the Governing Body approached Education Leeds under the new School Improvement Policy to highlight a number of key issues which they continue to need support with.

The most recent Ofsted Inspection of May 2008 judged Intake High School Arts College as a 'satisfactory and improving school'. However it noted that 'Standards in the main school are below average but inspection evidence shows that they are rising. Improvements in both the curriculum and the quality of teaching

are having a positive impact and most students are now making satisfactory progress'. Concern was expressed that achievement and standards in English are not improving as quickly as in other subjects, however standards in the sixth form are satisfactory and achievement is good.

Both Education Leeds and Leeds City Council share the view that Intake High School Arts College is still failing to deliver the education curriculum to the desired standard. This is exacerbated by the poor condition and suitability of the buildings. Whilst there have been additions to the main building they have caused difficulty in transition between classrooms, confusion in building layouts and severe accessibility issues. In addition buildings are uninspiring and in some instances depressing. Furthermore it is not possible to effectively deliver the Council's and Education Leeds' 'Inclusion and Extended Schools' agenda in the existing accommodation.

## **1.2 Strategic Overview**

Since 2004 Leeds City Council in partnership with Education Leeds, and the DCSF, (previously Department for Education and Skills) and PfS has undertaken a challenging timetable of refurbishing, rebuilding or a combination of both, those schools selected for investment as part of Leeds' BSF Wave 1 programme. The overriding objective of the programme is for a transformational and step change in secondary school education by means of significant capital investment.

The aims, objectives and outcomes of the Leeds Building Schools for the Future Programme are as relevant now as they were when they were set out in detail in the Strategic Business Case approved by the Department for Education and Skill (DfES) on 26 May 2005 and further developed in the final Business Case for Phase 1 and subsequent Outline Business Cases for Phase 2 & 3 as well as the Final Business Cases for Swallow Hill (West Leeds), Priesthorpe and Crawshaw.

**The aims, objectives and outcomes of the Leeds BSF Programme in relation to Phase 4 are detailed below:**

**Aims**

- To provide a framework for the transformation of teaching and learning
- To contribute to the realisation of the Vision for Leeds 2004 - 2020
- To improve learning and achievement
- To build upon the developments already undertaken through the secondary and post 16 review
- To ensure that the balance between the supply of and demand for places is appropriate within the demographic profile of the city
- To facilitate and develop the 14-19 strategy
- To provide up to date and modern facilities for a 21<sup>st</sup> century curriculum
- To facilitate the development of Extended Schools
- To develop ICT as a fundamental tool for achieving a step change in teaching and learning
- To support Education Leeds' Inclusion Strategy through the development of partnership bases.

**Objectives**

- To open an Academy in the existing building by September 2009 with the new build Academy being available from September 2011
- To ensure that the new buildings support 21<sup>st</sup> century expectations in styles of teaching and learning, technological developments with flexibility and adaptability to enable future changes as the education landscape evolves.
- To provide an e-confident school which will promote enhanced thinking, collaborative working and community cohesion
- To provide flexible and adaptable accommodation to enable the school to develop extended schools practice
- Raise educational standards by securing investment and providing an opportunity for all parties to input into a strong educationally led design brief
- Develop partnerships with organisations who share our values and together transform education in a way that best serves the local community for generations to come

- Support the 'Every Child Matters' strands and deliver significant improvements on all five outcomes for young people.

## **Outcomes**

- Leeds West Academy will be a high achieving school providing a curriculum which will help young people to feel more powerful and optimistic about their future, allowing all young people to follow their individual learning pathways and thereby gaining high self esteem through achieving success
- Leeds West Academy will be fully inclusive ensuring that all children and young people achieve success and have access to the highest quality education regardless of their background
- Leeds West Academy will be an e-confident school with ICT embedded in all teaching and learning
- Leeds West Academy will develop community links which will support the extended schools agenda.

The Academy will compliment the transformation that has and is currently taking place in education in Leeds as part of BSF Phase 1, 2 and 3 and will move Leeds a step closer to realising its vision for education. The Leeds West Academy is the final school in Leeds' BSF Phase 1 programme.

### 1.3 The Scheme

The key details of the new Academy are set out in the table below:

Fig 1: Key Data: Leeds West Academy

The Sponsor/Academy Trust	British EACT Foundation (EACT)
The Predecessor School	Intake High School Arts College, Calverley Lane Bramley Leeds LS13 1AH  Capacity: 1460  Current numbers on roll: 11-16 years: 926  Post 16 years: 105  Total: 1031
Opening Date for the Academy (in the existing building)	September 2009
Academy Specialism	English and Performing Arts
Age Range	11-19 years
Proposed Capacity (pupil numbers)	11-16 years: 1200 Post 16 years: 300
Opening Date for the New Building	September 2011
Additional Facilities to be provided	None

The project seeks to replace Intake High School Arts College, which is located in the Bramley district in the western area of Leeds with an 11- 19 Academy which will comprise of 1200 11-16 and 300 post 16 places. The Academy will have a lead specialism in English and Performing Arts.

The Academy will open in the existing buildings in September 2009 with the new buildings being available for occupation in September 2011.

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 DCSF as well as PfS. The Accommodation Schedule for Leeds West Academy has been developed using BB98 guidance.

Whilst the accommodation schedule proposed is below the BB98 gross internal floor area stated in the Funding Allocation Model (FAM) all parties involved (Leeds City Council, Education Leeds and EACT) are confident that it will enable the delivery of the proposed curriculum model. All parties have considered transformational ways of working and alternative educational models to ensure the aspirations of Leeds City Council, Education Leeds and EACT can be met both for the pupils and the wider community.

An indicative reference scheme has been developed to illustrate that the accommodation can be configured based on the agreed accommodation.

The design and construction works will be procured by Leeds City Council through PfS Standard Form Contract.

#### **1.4 EACT's and Leeds City Council's Commitment**

Leeds City Council and Education Leeds share EACT's aim of providing "A local Academy for local children and the local community.....Based on high aspirations, expectations and achievements". This supports Education Leeds' long standing policy of "Local Schools for Local Children" that embraces diversity and choice for local parents.

There are 4 key reasons why Education Leeds believes that an Academy is the right proposal for Intake High School Arts College:

- The need to accelerate improvement, whilst there has been improvement there is a need to see this impact faster on the achievements of young people.

- An Academy would bring extra support both professional expertise and other resources which will help to sustain improvement.
- EACT is an organisation that is geared up to maximise what Intake can learn from the family of schools in Leeds and can supplement this with support from their network of academies.
- EACT's commitment to developing local communities means that there is an exciting opportunity with a new state of the art School to provide inspiring and accessible learning to everyone in the Bramley and Stanningley, Armley and Kirkstall district.

Education Leeds and Leeds City Council believe that in the context of the National Challenge it is not acceptable to leave the status and governance of the school unchanged. There is an acknowledgement that further action is needed and a commitment to accelerate the improvements in outcome for the children and young people in the area to meet the National Challenge and make a stronger contribution to the region of West Leeds

There is an acknowledgement that there have been improvements in educational attainment in recent years with the help of additional support provided by Education Leeds however they are still not at the desired standard. It has proven difficult to sustain these improvements and the change to academy status will allow for additional resource to be brought into the school to accelerate and sustain these improvements.

It is expected by Leeds City Council, Education Leeds and EACT that the resulting Academy will be an inclusive school providing appropriate accommodation to support children and young people.

Elected members of the City Council have supported the aims and objectives of the City Council's involvement in the Government's BSF Programme as set out in the Strategic Business Case.

EACT and Leeds City Council confirm their commitment to working together to procure the design and construction of the new Academy using the LEP. A Responsibility, Accountability, Consulted and Informed (RACI) Matrix has been developed and signed off by Leeds City Council, Education Leeds and EACT, The RACI Matrix defines the roles and responsibilities of those stakeholders involved in the project.

DCSF has endorsed the project to progress into procurement and engage with the Leeds LEP.

EACT has been fully involved in the work to develop the OBC and confirm that the concept designs support the Education Brief that has been developed for the Academy.

Leeds City Council and EACT can confirm that they will follow established PfS procedures and utilise the standard suite of documents for procurement. Any derogation to the contract will be agreed by all parties well in advance of the Final Business Case being submitted to PfS for approval.

## 1.5 Summary

Leeds City Council can confirm that the Scheme fits with its local priorities.

The Education Brief, including the curriculum model and accommodation schedule, has been developed and signed off by the PSG and by the DCSF as well as PfS. The accommodation schedule details a total area that is below the BB98 gross internal floor area stated in the FAM. However all parties involved (Leeds City Council, Education Leeds and EACT) are confident that it will enable the delivery of the proposed curriculum model.

The Council and EACT both confirm their commitment to working together to procure the design and construction of the new Academy through the Leeds LEP.

The DCSF has endorsed the project to progress into procurement and engage with the LEP.

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

- 1A. Education Brief, including the Curriculum Model
- 1B. Accommodation Schedule that demonstrates an area based on the BB98 gross internal floor area allocation
- 1C. A letter of support from Leeds City Council
- 1D. Papers and minutes of Leeds City Council's Executive Board meeting held on 16 April 2008 giving approval to undertake a detailed feasibility exercise and consultation on the proposal to establish an Academy
- 1E. Papers and minutes of Leeds City Council's Executive Board meeting held on 3 December 2008 giving approval for the publication of a statutory notice to close Intake High School

Arts College on 31 August 2009 and open an Academy on 1 September 2009 conditional upon DCSF approval

- 1F. Papers and minutes of Leeds City Council's Executive Board meeting held on 4 March 2009 giving approval to the unconditional closure of Intake High School Arts College on 31 August 2009 and the creation of Leeds West Academy
- 1G. Papers and minutes from Leeds City Council's Executive Board meeting held on 17 June 2009 giving approval to the submission of the OBC to PfS and DCSF
- 1H. Roles and Responsibilities Matrices

## 2 PROCUREMENT STRATEGY

**Section 2** and **Appendix 2** of this OBC describe the details of the Scheme to be procured through the Leeds LEP.

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

- Facilities Management (FM) services
- ICT services contract

### 2.1 Procurement Strategy

The scheme is a Single School Project and includes the design and construction of the Leeds West Academy and will be procured via the LEP which has sole and exclusive right to construct the Academy under the Strategic Partnership Agreement (SPA) signed on 3 April 2007 with Leeds City Council. The exclusivity afforded is dependent on the LEP successfully proceeding through the two approval stages set out in the NPP process.

The benefits to the City Council of this arrangement are:

- The avoidance of significant procurement costs both to the City Council and to the Private Sector Partner
- Financial benefits arising through certainty and economies of scale resulting in lower costs to the City Council
- Support and partnership working with the City Council and Education Leeds to help to deliver the strategic objective of transformational outcomes in teaching and learning.

The LEP has successfully delivered the first three of five brand new schools, together with significant progress on two wholesale refurbishments, with six more to follow. The partnership has also saved nearly £40m through an efficient procurement process.

At the 2008 Excellence in BSF Awards, Leeds LEP which brings together Leeds City Council, Education Leeds, PfS and Environments 4 Learning was named the best in the country.

Chris Edwards, Chief Executive of Education Leeds described the partnership as a 'fantastic success because everyone involved shares our vision to create brilliant learning places where every young person can be happy, healthy, safe and successful'.

Under the PfS BSF approach for Academies, Leeds City Council understands that it carries the risk of ensuring that the project is delivered within the funding envelope. Attached at Appendix 2 is a letter from EACT clearly setting out the new Academy will be delivered within the funding envelope and any potential cost overruns will be mitigated by appropriate rescoping to remain within the affordability envelope.

Leeds City Council will not be contributing to the capital cost of the project other than provide an off site works budget. Where it is identified that the cost of the Academy will exceed the budget available from PfS, all parties understand and recognise that there will be a requirement to look at ways of how any affordability gap will be met.

Both Leeds City Council and EACT have and will continue to consider transformational ways of working and alternative educational models so that the challenge of providing a high performing educational establishment within the agreed funding envelope is met.

The Project will be delivered using the Lump Sum version of the Partnerships for Schools standard form Design and Build contract.

## 2.2 Programme of Work

A detailed programme of work has been developed based on the guidance issued by PfS. The key milestones from the programme are detailed in the table below:

<b>Milestone</b>	<b>Date</b>
Submit Stage 0 Business Case to the LEP Programme Group	May 2009
DCSF / PfS Approval of OBC	July 2009
Commence New Project Procedure (NPP) Stage 1	July 2009
LEP submit NPP Stage 1 submission	September 2009
LCC evaluate and approve Stage 1 submission	September 2009
Commence NPP Stage 2	October 2009
Submit detailed Planning Application	December 2009
LEP submit NPP Stage 2 submission	March 2010
LCC evaluate and approve Stage 2 submission	March 2010
DCSF / PfS Approval of FBC	April 2010
Financial Close	April 2010
Work commences on site	April 2010
Establishment of the new Academy	September 2011

## 2.3 Summary

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

In addition the following services are being procured by the Academy trust:

- Facilities Management (FM) services
- ICT services contract

A realistic programme of work has been put in place based on the guidance issued by PfS. Building Completion date for the Leeds West Academy has been programme for August 2011 with a view to the Academy opening in September 2011.

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

2A A detailed programme of work : Gantt chart

2B A letter from EACT in support of the OBC

### **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**

The site for the proposed Leeds West Academy is located less than four miles to the north west of Leeds City Centre. The site is located just below the ridge on a north facing valley side. Intake Lane, which forms the western site boundary, delineates the high point of the site. From the higher parts of the site to the West and South there are impressive views over the adjacent residential areas out towards open countryside. The low point of the site is located to the North, just to the South of Calverley Lane. The cross site falls from the high to low points are dramatic and the development will respond to this unique opportunity.

It is proposed that the new Academy buildings will be located to the west of the site on elevated ground away from all perimeter boundaries and will be separated from adjacent residential properties with landscaped buffers. The new buildings will be grouped in a legible cluster around a clear central focus point.

The new buildings will respect the character of the adjacent neighbourhood and where large buildings are required such as the sports hall, these will be positioned to exploit both topography and the position of the surrounding buildings to minimise their visual impact.

The access to the new site will be via Intake Lane as opposed to Calverley Lane which is the current access route. This will provide more appropriate access to the Academy based on the current pupils' home location.

Building work will be scheduled to minimise noise during lesson time and to residents. Leeds City Council and Education Leeds have a wealth of experience managing large educational building projects whilst minimising disruption. During construction IPSL will cordon off the area of work away from the pupils, staff and third party users/visitors. The Control Option reflects how construction will be phased at the site.

During construction some of the current outdoor playing areas will not be available. In order to enable the school to carry on with their outdoor education delivery, the Project Team has arranged for the use of the sports provision at Valley View Community Primary

School. A letter from Mrs S Griggs (Headteacher) has been received agreeing to this request.

There are no requirements for decant or relocation of school property envisaged because the existing school will not be demolished until after the new buildings have been completed. Work will only commence on demolishing the old school upon the successful completion of the new Academy buildings. Once demolition has been completed work will be undertaken to replace the existing playing areas.

As stated previously it is anticipated that the new build accommodation will be 12,210 m2.

### 3.2 Land

The Council's Legal – Licensing & Registration Services has confirmed that the ownership of the land lies with the Council. This information has also been verified by the Council's legal advisor DLA Piper. Furthermore there is no land acquisition associated with this scheme.

Leeds City Council can confirm ownership of the site and that it is clear and unencumbered.

<b>Issue</b>	<b>Description</b>	<b>Action to Mitigate</b>
Easement	Easement with British Gas as detailed on the Title Number WYK838471. (Shown as the Electricity Sub Station)	Easement will continue when the land is transferred to EACT.

Leeds City Council will be putting in place a short term Lease Agreement because EACT will be taking up occupation prior to the exchange of the Development Agreement. The short term Lease will contain a break clause which will provide that it will immediately determine on exchange of the Development Agreement, whereupon the Academy's continuing occupation will be under the occupational licence in the Agreement.

A 125 year lease will be granted by Leeds City Council to EACT for the new buildings at the end of the defects liability period.

### 3.3 Surveys and Investigations

Leeds City Council has undertaken survey work prior to the NPP Stage 1 to ensure that a robust reference scheme can be developed which is reflective of the current site conditions.

Scopes of the survey:

The following surveys have been proposed by the LEP as additional partnering services:

Surveys are required in respect of the following:

1. Ground Investigation Survey
2. Type 2a Asbestos Survey

As well as providing a statement of current condition, all survey reports will include an interpretation of findings, highlighting any major areas of concern or limitation of use, together with overall recommendations.

A full MHDS 100 Type 2a survey of the existing premises will be undertaken to inform the reference scheme. It is not feasible to undertake a full type 3 survey because the existing premises are still occupied however one will be carried out once the building has been vacated prior to demolition.

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. Key surveys have collateral warranties which will be provided to the LEP and its supply chain as well as EACT.

<b>Survey</b>	<b>Date Completed</b>	<b>Findings</b>	<b>Cost Implication (Yes/No)</b>	<b>Collateral Warranty Provided (Yes/No)</b>	<b>Location of Survey Report</b>
Topographical survey	TBA	Existing site level confirmed	Yes	Yes	V Room
Underground utilities investigation, including drainage survey	TBA	Subject to design	No	N/A	V Room
Type 2a Asbestos Surveys	TBA		Yes	Yes	V Room
Desk top ground investigation and intrusive investigation scoping	October 2006	Made ground identified, requiring possible abnormal foundations. No significant potential for contamination, based on past site usage. The site is free from stability problems associated with any past shallow mining	Yes	No	V Room
Intrusive ground investigation including factual and interpretive report	April 2009	Early indications are that the ground is stable and free from any potential hazards	Yes	Yes	V Room

<b>Survey</b>	<b>Date Completed</b>	<b>Findings</b>	<b>Cost Implication (Yes/No)</b>	<b>Collateral Warranty Provided (Yes/No)</b>	<b>Location of Survey Report</b>
Previous land use desk top study	October 2006	No uses prior to school construction. No contaminative activities or industries have operated within the site or its immediate surroundings in the past	No	No	V Room
Site noise survey and assessment	December 2008	Site and surroundings generally quiet. Careful location of noise sensitive/generating areas as design proceeds	No	No	V Room
Statutory Utilities searches	October 2006	All services available at site perimeter. With the exception of some land drainage and private supplies, no utilities within site boundary.	Yes	No	V Room
Phase 1 Ecology Habitat Survey	May 2007	Site is of low ecological and habitat value	Yes	No	V Room

### **3.4 Design Brief**

A Design Brief has been developed which reflects EACT's aspirations expressed during the development of the initial design options. The Design Brief will be included within the City Council Requirements documentation to assist the LEP in developing its new projects proposals along with the Education Brief.

#### **Design Quality**

Design quality will be a fundamental part of this project with the aim of ensuring that the buildings procured for the Leeds West Academy are of the highest quality and a source of inspiration for the pupils and the wider community. Design Quality will be benchmarked against stakeholder expectations using Design Quality Indicators (DQI).

A Design Quality Indicator (DQI) workshop was held with key stakeholders led by Jonathan Gibson (EC Harris), an accredited DQI facilitator. The role of the DQI facilitator was to support the consultation process which enabled key stakeholder requirements for design to be fully understood.

Stakeholders were chosen from Technical and Non-Technical backgrounds and included representatives from the LEP, Interserve, Mentor Architects, Leeds City Council, Education Leeds and EACT. Pupils who are currently in Year 8 from the school also attended the workshop along with a School Governor. From this a consensus view on the design quality priorities for the Academy was identified and agreed.

As part of the Academies programme, PfS recommend that a Design User Group (DUG) is set up to act as the main stakeholder body for consultation on all design matters.

DUG meetings commenced in October 2008 and are scheduled to take place every month. The DUG meetings are attended by EACT, Education Leeds, PPPU, Interserve, EC Harris and the DCSF Project Lead. The purpose of the Design User Group is to:

- Act as guardians of EACT's Education Vision for the Academy
- Input to the brief for the design of the Academy
- Set the Design Quality Indicators (DQIs) for the scheme
- Act as the main stakeholder body for consultation on all design matters

- Be the key group responsible for ensuring the design proposals are within the agreed funding envelope agreed by PfS and Leeds City Council's Executive Board
- Sign off the final designs by the LEP partner.

The members of the Design User Group are and will continue to work collaboratively throughout its existence.

Leeds City Council, Education Leeds and EACT believe that good design will contribute to creating an environment which supports a learning experience, encourages and motivates pupils, enhances staff recruitment, motivates and retains them whilst adding to the value of the asset. As a result of meeting this and other architectural aspirations Leeds City Council has an appointed Design Champion, Mark Burgess who is based in the Council's City Development Department and he will be responsible for ensuring that the buildings are consistent with Leeds City Council guidelines.

Mark Burgess will be assisted by representatives from Leeds Architectural Design Initiative (LADI), Commission for Architecture and the Built Environment (CABE), Leeds City Council Planners and Education Leeds.

The following generic good practice 'Urban Design Principles' developed by Leeds City Council's Architects team will be applied to guide the development of the detailed design proposals:

- Investing effectively – recognising that good design is good business
- Working together – get the team right
- Involving the community – make places for (and by) people
- Regenerating throughout Leeds – close the gap and move forward
- Delivering sustainable environmental solutions – provide for future generations
- Creating excellent new places – take a visionary approach
- Connecting places – create visual and physical links
- Managing the investment – look after the place
- Reviewing our work – improve continuously

In addition the Leeds City Council Architects team have produced a set of detailed design principles which will inform and guide the design of Leeds West Academy.

The objectives of the principles are as follows:

- Character – To create a place with its own identity
- Continuity and Enclosure – To create a place where public and private spaces are clearly distinguished
- Quality of the Public Realm – To create a place with attractive and successful outdoor areas
- Ease of movement – To create a place that is easy to get to and easy to move through
- Legibility – To create a place that has a clear image and is easy to understand
- Adaptability – To create a place that can change easily
- Diversity – To create a place with variety and choice

Through the NPP process Leeds City Council will ensure that a wide range of individuals are consulted who will be responsible for appraising, challenging and evaluating the school design to realise design excellence in both built form and educational functionality.

Leeds City Council's commitment to promoting and realising design excellence has been widely recognised and at the recent opening of Allerton High School, Prime Minister Gordon Brown declared it was one of the 'most innovative schools' he has seen and a 'model for others to follow'.

### **BREEAM for Schools**

Leeds City Council's position in relation to BREEAM is that all schools should achieve where practicable and realistic a minimum of a very good score. In order to achieve this all procurement documentation upon which the LEP's designs will be benchmarked against will state Leeds City Council's position on BREEAM. It will be a requirement for the LEP to demonstrate during their design development that the required score can be met within the funding allowance.

### **3.5 Construction Phasing / Decant Strategy**

The construction phasing and decanting strategy has been carefully considered and developed to a high level of detail and considers options for the phasing of the construction works.

The preferred option for construction phasing is detailed below:

The proposed location of the new building will be set away from the existing buildings thereby minimising any disturbance to the current curriculum delivery. On completion of the new buildings, education delivery will move to the new site and the existing building will be demolished. It is proposed the site of the existing school will then be converted to appropriate outdoor areas for the Academy to utilise.

Through our work on previous BSF phases which includes both PFI as well as Design and Build, Leeds City Council has built up a wealth of lessons learned and our plans have been developed to take into consideration those lessons learned.

In considering the options for transition, the effects on pupils and staff as a result of the construction works have been taken into full account, with the aim of minimising both the cost and the extent of the disturbance.

### **3.6 Carbon Neutral Schools Initiative**

The DCSF expect carbon emissions from new school buildings to be reduced by 60% relative to those that are currently being constructed and have been designed to 2002 Building Regulations. The target also includes emissions attributable to equipment used within the school. Leeds City Council, Education Leeds and EACT are committed to ensuring that the new Leeds West Academy will be capable of reducing carbon emissions by 60%.

The PfS FAM for this project includes an allocation of £755,200 to deliver the carbon reduction targets required by the DCSF.

The Project Team are confident that they will be able to achieve the target and will use Part L of the Building Regulations as a guide. It is also envisaged that further carbon savings will be achieved as a result of meeting the BREEAM target.

Leeds City Council confirms that a requirement of the LEP's submissions will be for them to demonstrate that their proposals will achieve the 60% target within the overall funding allocation as described in this OBC. This demonstration can be provided through reference to the DCSF guidance and use of the 'carbon calculator' and published on Teachernet.

### 3.7 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. The council will take full responsibility for relocation.

	Current Users			Users once Building Works Completed			
Third Party	No. of Staff (FT/PT)	CRB Checked? (Yes/No)	Accommodation (Location, no. of rooms, area of each room)	No. of Staff (FT/PT)	CRB Checked? (Yes/No)	Entrance Requirement	Accommodation (Location, no. of rooms, area of each room)
Millford Netball Club	25	N/A	Gym	25	N/A		Gym
Farsley Celtic Junior Soccer Teams	30	N/A	Soccer Pitch	30	N/A		Soccer Pitch

If at a later date it is not possible to carry on with the existing letting arrangements then the Council's Lettings Unit will relocate groups to other schools in the area where possible. Under Leeds City Council's 'Conditions and Guidelines for Hirers', the Council's Lettings Unit is under no obligation to relocate groups in the event that the school they are using becomes unavailable. However it is normal practice for the Lettings Unit to find alternative location in close proximity where possible.

### 3.8 Summary

The Council can confirm that they own the land on which the Academy will be built and that there are no encumbrances, 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.

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

An initial Control Option for the Scheme has been prepared which demonstrates that the Scheme is deliverable.

An Initial DQI Workshop has been held and there is a commitment to using the DQI process throughout the design, construction and operation of the projects.

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

A construction phasing and decanting strategy has been developed.

The FAM for this project includes an allocation of £755,200 to deliver the carbon reduction targets required by the DCSF. Leeds City Council confirms that a requirement of the NPP submissions will be for the LEP 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. Existing and proposed site layout
- 3B. Plan of the site to be transferred to EACT
- 3C. Certificate of Land Title
- 3D. Collateral Warranties for surveys and investigations
- 3E. Output from DQI Workshop
- 3F. Control Option
- 3G. Letter from Mrs S. Griggs (Headteacher at Valley View Community Primary School) giving approval to use the School's outdoor sporting provision during construction

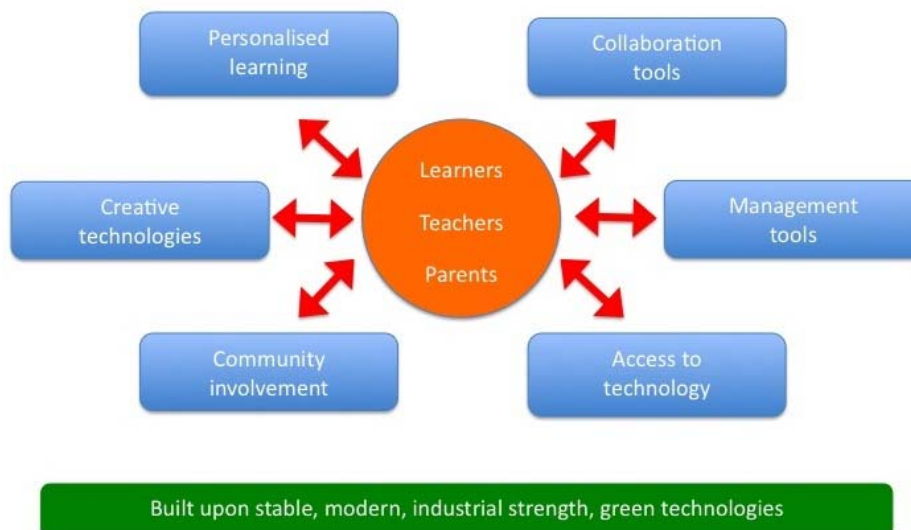
## 4 ICT

**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 EACT's preferred delivery method and validates the rationale for that choice, including how the service is intended to integrate with the wider Leeds City Council provision.

EACT's ICT vision is to support excellence in education for all by making state of the art technology fully accessible to stimulate creativity, collaboration, community involvement, efficient administration and personalised learning.

The objectives are:

- To maximise opportunities for students, communities and staff to access state of the art creative and learning technologies
- To provide a range of tools to support personalised learning for students, staff and all partner stakeholders
- To use technology to increase efficiency of administration and management processes.



***Personalised learning***

**We will provide a state of the art, personalised learning platform:**

We will have a personal portal accessible from anywhere giving easy access to work and assignments, e-portfolios, learning tools, learning content, timetables, a learning journal, links, news and curriculum information. Students will be able to work upon and upload homework and see results from assessments. Staff will be able to assess homework and review pupil performance.

***Collaboration tools***

**Our technology will encourage and stimulate collaboration:**

We will have the freedom to work online collaboratively, on shared documents and multimedia, through interactive forums, using video-conferencing and in live online chat sessions. This collaboration can take place in the Academy, from home or between academies.

***Creative technologies***

**We will use technology to unlock and stimulate creativity:**

There will be a complete range of creative tools available allowing the creation, editing and publishing of audio, music, video, animation, graphics, text, web pages and CAD/CAM. These technologies will be available to all.

***Management tools***

**Management will have tools providing up to date information:**

There will be a suite of management tools providing full access to information on finance, HR, pupil and school performance.

***Community involvement***

**The community will have access to our technology:**

Parents and carers will have portal access to information on their child's curriculum, homework and development. Academies will have Internet Cafés and wifi access within and beyond the walls of the Academy to allow learning, anywhere, anytime.

***Access to technology***

**Access to technology will be maximised:**

There will be full wifi access within the Academy. All teaching staff will have laptops. Students will have access to a pool of loanable laptops and PDAs. Every teaching room will have a PC, projector, interactive whiteboard and printer.

***Built upon stable, modern, industrial strength, green technologies***

**Technology will be modern, stable, robust and green:**

All technologies used will be modern, designed to be stable and reliable, integrated together and robust enough to deliver needs. We will ensure that our technology is green, reducing our CO<sub>2</sub> footprint and encouraging recycling.

As part of BSF Phase 1, Leeds City Council procured a Strategic Partner for ICT, Research Machines Plc (RM), in order to gain benefits across all schools through economies of scale. The scope of the proposed procurement was set out in the Final Business Case for the ICT Strategic Partner Contract approved by PfS in 2007. Subsequently in May 2007 RM was appointed as the ICT Strategic Partner.

Leeds City Council and Education Leeds have been working in partnership with RM on previous phases of the BSF programme. At the 2008 BSF award, Leeds won the award for the nation's best innovation in ICT for work on the £260m first wave of BSF which is creating 13 state of the art secondary schools.

EACT will "opt-in" and work with the Council and its ICT Strategic Partner to define and agree the nature and delivery of the ICT and related managed services.

RM will provide a managed ICT service comprising the following elements:

- Strategic Services
- Operational Services
- Continuing Professional Development Services

### **Strategic Services**

The Strategic Services encompass a number of school specific services including:

- Building design solution
- Passive network design
- Active network design, build and systems integration
- User software
- School administration software
- Legacy hardware and software integration – where possible and necessary
- Performance management reporting
- Strategic planning to support schools in developing their strategies
- Interface management – RM will handle all voice, web or email calls for ICT support from the school
- User equipment and software.

The strategic service also extends to provide support on the Leeds Learning platform as follows:

- Training on tools and the use of e-learning
- Promotion of the available tools and curriculum models
- Production and provision of materials
- Support to the School and staff.

## **Operational Services**

The Operational Services again fall into different categories, the first of which is the Service Desk. The Service Desk provides first level support for all ICT issues and will also channel incidents, where appropriate, to second level service desks. RM will manage the resolution of all issues including those passed to third parties until they are considered closed by the school. The Service Desk will be available during core school hours (0800hrs to 1800hrs) as a minimum and voicemail, email and on online web service will be available at other times for users to report incidents.

RM will also provide a recommended minimum standard for hardware and software items, anywhere anytime access, backup, business continuity, disaster recovery, virus and malicious attack protection. These will incorporate best practice from industry and other authorities and demonstrate consideration of lifespan, robustness and other relevant issues and they will procure and supply such goods.

There will be a published set of agreed minimum operation standards for the service to ensure overall availability and operation of all ICT services. RM will provide both preventative and reactive maintenance to ensure full functionality of all equipment, services and access to resources within agreed time constraints.

Additionally RM will provide a complete and reliable management information system which will deliver to prevailing BECTA standards and which can provide all information which would reasonably be required by EACT, Leeds City Council and Central Government by use of a Management Information System (MIS).

## **Continuous Professional Development**

The Continuing Professional Development (CPD) services cover the professional ICT development of all staff in the school. This is critical to ensuring transformation is achieved in schools and that it delivers real benefits to learners, The CPD programme includes strategies for maximising the impact of ICT across the school.

Another area covered in this section is classroom practice development. RM will provide access to support the development of classroom practice through shadowing, observation and feedback. They will also provide access to best practice in classroom use of ICT, through the Learning Platform and through seminars and visits.

EACT will work with the Council and RM to define and agree the nature and delivery of the ICT and related managed services.

The interfaces between the LEP and RM will be managed through an additional contract schedule (the 'ICT Protocol') which defines the monitoring arrangements.

The key points of the ICT protocol are:

- Effective design development through the review process
- A detailed access plan that will enable safe access and deal with interface issues during installation of ICT equipment prior to service commencement
- Details of the insurance responsibilities of the parties, both during the works and services period, on the allocation of risk in relation to security issues, theft and malicious damage.

A similar agreement will be negotiated and effected with EACT.

All ICT proposals will provide for services and systems which, as a minimum, meet the relevant BECTA standards and in many cases exceed them to provide assurance 'future proofing'.

## **4.1 Options Appraisal**

ICT services will be handled as part of a managed service through Leeds City Council and its LEP partner.

Other options, such as opting out from the ICT Strategic Partner arrangement were considered and ruled out by EACT as:

- The existing arrangement is robust and meets all the needs
- There is flexibility within the arrangement to allow for the needs of all parties to be met.

The following high level approach has been arranged between EACT and RM.

### **High Level Approach**

The aim is to develop a modern, well managed, cost effective ICT service built and operated to ICT industry and sector standards, designed to meet the educational needs arising from the Academy.

EACT are aiming for a ratio of devices to students of 1:1; this will be through a mix of thin client technology (where appropriate), conventional PCs, PDAs, laptops and other peripherals. Given the performing arts specialism of the Academy EACT will also be exploiting opportunities to use other technologies to maximise engagement with students and deliver learning. These will include Apple Macs, video and audio technologies, PSPs / Nintendo Wiis, etc. Teachers will all be equipped with laptops and there will be a bank of portable devices available for students. The Academy will have a pervasive wireless network across its site. Printing will be operated on a follow-me basis through a number of multi-function devices which will be monitored.

Teaching and learning will be supported by the VLE, which will be accessible internally or from outside the Academy and will feature:

- Learning materials to support National Curriculum with authoring tools
- The ability to set, distribute and allow online submission and marking of homework and assignments
- A “dashboard” with easy access to key information, documents and email all on one page

- E-portfolios allowing creation of portfolios for assessment or showcasing with areas for capturing learning journals
- Collaboration areas and tools allowing sharing of information
- Parent/carer's portal providing online access to information on their child and their progress
- Links to management information systems.

A robust management information system will be used to support administration and teaching and learning processes.

These services will be delivered from a remote, managed data centre, based around industry standard, best of breed technologies and utilising virtualisation and replication to provide ease of support and maximum availability.

There will be a range of non-computing devices linked into the network, including CCTV, VOIP phone system, access control, cashless catering and building management devices.

Technology implemented will be supported through a CPD programme linked to the Academy improvement plan. There will be transitional training, including familiarisation of staff with ICT, full support to agreed service levels, a helpdesk and appropriate on-site provision. ICT staff will be multi-skilled to handle the full range of demands placed upon them.

### **Future proofing**

The chosen technical solutions will be finalised at the latest opportunity to take advantage of changes and improvements in technologies. EACT will be using thin client devices where appropriate; these will:

- Reduce capital costs of implementation
- Extend the life of the equipment (as they have few moving parts)
- Are easier to support ("plug and play" to replace a defective machine)
- Consume less power (e.g. 4W per device, compared to 45W for a normal PC)
- Produce less heat (reducing cooling/plant need)

- Allow more cost-effective upgrades (clients don't need replacing often, upgrading of servers at the back end deliver improved speed/performance/stability at considerably lower cost). The use of server virtualisation allows more cost effective management and upgrade of servers, in addition to providing a solution for Disaster Recovery.

EACT and RM will work with BECTA to ensure that technologies being planned are relevant, forward-looking and contemporary with sector best-practice.

There will be retention of 25% of the ICT capital investment to provide a future fund supporting enhancements and upgrades. This will be supplemented by ICT allowances in revenue budgets and other grants. There will be a 3-5 year refresh cycle – the use of technologies described above will allow the refresh window to be extended.

There will be a rolling annual plan and regular strategic reviews between EACT, RM and the Academy to agree priorities including the refresh programme, enhancements, CPD / training and ICT Supplier performance against service levels.

Following a recent BECTA audit, a review is underway of potential funding sources to meet transitional needs. Should no funding be available, it may be necessary to undertake a drawdown of around £100k from the ICT capital allowance. An investment of this size will be necessary so as not to disadvantage current year 10/11 students and to maintain the minimum standards of acceptable ICT provision. This will support the educational and ICT vision ahead of the new build and is factored into the projected costs in section 6.3 below.

## **4.2 Interfaces with Design and Construction Contract**

RM will work with the LEP and IPSL, the construction partner as well EACT and Leeds City Council during the project delivery. This includes:

- Pre-financial close to support and give input to issues relating to design and the curriculum
- In the build-up to construction to give input and advice to succession of room and building designs
- During construction works period to develop and agree entry and exit points for ICT installation and ensure that the building is ICT ready
- During handover / implementation to ensure a smooth transition

There will be a defined Project Manager within EACT and RM to scope, agree and implement ICT solutions. There will be regular meetings and reviews between RM, EACT, Leeds City Council and the LEP's construction partners.

The ICT capital budget for hardware which is currently £1,450 per pupil and the infrastructure capital budget which is £225 per pupil are to be delivered to EACT via the existing ICT Strategic Partner arrangement.

The details and nature of the provision is subject to further negotiation between the Council, the ICT Strategic Partner and EACT.

### 4.3 Summary

EACT has conducted a robust and thorough ICT options appraisal to determine the ICT approach.

Stakeholders have been consulted in developing the ICT proposals.

EACT has confirmed that they will procure the ICT provision through the Council's ICT Strategic Partner, RM.

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

The following documents are attached at **Appendix 4::**

4A. ICT Vision

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

## 5 FACILITIES MANAGEMENT

**Section 5** and **Appendix 5** of this OBC detail the proposals for the provision of Life Cycle and Hard FM which has been submitted by EACT.

EACT will provide Life Cycle and Hard FM services at Leeds West Academy and will endeavour to comply with both Government and Leeds City Council requirements. EACT recognises the importance of compliant maintenance for the enhanced facilities and fully understands what it will be responsible for when Leeds West Academy occupies the current facilities from September 2009. This obligation will be carried through to the new buildings EACT will take over from September 2011.

Intake High School Arts College currently employs 2 Site Supervisors and 2 Environmental Workers and where possible all facilities maintenance is provided in house. EACT are committed through the TUPE process to ensuring that all staff at Intake High School Arts College will be employed in suitable positions in the Leeds West Academy. It is anticipated that the work undertaken by these employees will be replicated following the opening of the Academy on 1 September 2009.

EACT are currently scoping staff requirements for the new building but based on the increased floor area the current indications are that there will be an increase in the number of maintenance staff, cleaning staff and catering staff. EACT are committed to providing training and will ensure that all staff are appropriately trained including managing visiting contractors, additional administration, understanding the function of assets and Health and Safety regulations that should be adhered to. This will also include carrying out Risk Assessments and Method Statements for generic tasks.

The School currently sub contracts services where specialist skills are required. This includes large scale decorating, landscaping works, specialist electrical, environmental and other specialist work. EACT also anticipate procuring similar services for Leeds West Academy to ensure that all facilities management requirements as well as regulations are fulfilled.

The current policy for demonstrating value for money involves requesting three quotes for all projects where the total lifetime cost exceeds £3,000. Once obtained, the supplier selection is carried out by the current bursar. EACT itself has developed procurement procedures that are in accordance with the Academies Financial Handbook written by the DCSF. EACT will adhere to this policy and

understand that it is a requirement of the funding agreement. To ensure compliance, EACT has a dedicated Procurement Manager who is responsible for ensuring that an EACT wide view is taken to all procurement decisions.

EACT anticipates that existing contracts to provide FM services will be transferred across to Leeds West Academy, however as contracts begin to expire, it plans to undertake reviews of specific areas to ensure that value for money is being achieved. Areas that will be reviewed include electrical testing where EACT believes it can demonstrate value for money by accessing the scalability of contracts using suppliers that can perform services at all or a large number of its Academies across England.

EACT may also consider entering into agreements with suppliers to deliver large parts of its FM obligations on either a single academy or a national basis.

The value for money and procurement review will include the LEP and where EACT believes that this offers the best option for the Academy it will consider buying services from it.

EACT is committed to ensuring that it meets all the lifecycle and hard FM costs and will invest in these costs from the available funds to ensure that it can meet all the obligations involved in taking over this area of the contract.

## 5.1 Summary

EACT has set out their strategy for delivering life cycle and hard FM services and confirmed that they will consider buying these services from the LEP.

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

Set out below are the indicative capitals compared to the funds available through the FAM model

Category	FAM (£)	LA Estimate (£)	Variance (£)
Construction Costs	20,886,815	20,424,655	- 462,160
External Works	2,505,418	3,659,905	1,154,487
Abnormals*	1,444,341	2,628,535	1,184,194
Fees	3,054,696	3,309,836	255,140
FFE	1,794,161	incl above	- 1,794,161
ICT Infrastructure	337,500	incl above	- 337,500
Carbon Reduction	755,250	755,250	0
Local Authority Works	350,000	350,000	0
<b>D&amp;B Contract sub-total</b>	<b>31,128,181</b>	<b>31,128,181</b>	<b>0</b>
ICT Hardware	2,175,000	2,175,000	0
<b>Total</b>	<b>33,303,181</b>	<b>33,303,181</b>	<b>0</b>

**Notes:**

Construction Start Date: April 2010

Location Factor: 1.03

\* Includes additional £400k abnormals

## **6.2 Abnormal Costs**

During the development of the initial designs, Leeds City Council has undertaken surveys and investigations and considered the results. The abnormalities identified have been costed and the costings agreed with PfS.

## **6.3 ICT**

The ICT capital budget for hardware which is currently £1,450 per pupil and the infrastructure capital budget which is £225 per pupil are to be delivered to EACT via the existing ICT Strategic Partner arrangement.

Indicative annual maintenance costs from RM are approximately £172,000 per annum; this equates to an average cost per student of around £115. This places it well within the national average of £100 - £200 per student.

The details and nature of the provision is subject to further negotiation between EACT, RM and Leeds City Council as well as Education Leeds.

## **6.4 Lifecycle/Hard FM costs**

EACT has reviewed the lifecycle and hard FM costs provided by Leeds City Council which it understands are indicative and provide an estimate of FM costs based on an average of other Leeds BSF Schools. EACT will undertake a further review of the expected costs as the design and requirements for the new buildings are progressed to ensure that they are realistic and affordable. It is EACT's intention to provide the best value for money for the use of the Academy's funding provided by the DCSF and any external income that EACT raises on behalf of the Academy.

EACT has reviewed the current costs incurred by Intake High School Arts College that comprise the Facilities Management in total (the school does not currently differentiate between Hard and Soft FM). The actual costs for the 2008/09 financial year for facilities management amounted to in excess of £66,000 which does not include the salaries and on-costs of the four permanent members of staff. The Academy is expected to maintain this level of expenditure for 2009/10

EACT anticipates, given the level of funding required in comparison with the environmental grants of £250,000 (estimated) being made available to the Academy that the current spending plans are affordable and within the funding envelope.

EACT is currently reviewing its expenditure forecasts in terms of the new building's services and is content to use the LCC forecasts as an estimate of costs to base its own budgeting on, given that many of these services are currently provided to the school by Leeds City Council. As a multi academy sponsor, EACT will seek to manage its academy portfolio in a manner that will maximise the use of funds across the EACT family of academies.

EACT is committed to ensuring that it meets all Lifecycle and Hard FM costs, and commits to meeting these costs from the funds available to it from the General Annual Grant (GAG). EACT are also committed to working closely with all stakeholders and partners involved.

## **6.5 Other sources of funding**

There are no other sources of additional central government, local government or other agency funding identified for this project.

As stated previously, Leeds City Council will not be contributing to the capital cost of the project other than provide an off site works budget for the following elements:

- Improvements to the Bus Stops located on Intake Lane and Coal Hill Lane
- Development of the bus lay-by and shelter(s) on Calverley Lane
- Funding of Traffic Management Measures as determined by the Highways Maintenance Section.

A budget of £350,000 has been allocated for the off site works.

## 6.6 Summary

Leeds City Council confirms that the OBC provides a separate cost estimate reconciled against the FAM for design and build as well as the ICT elements of the project.

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

The Council believes that the new build Scheme represents value for money.

EACT and Leeds City Council 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. EACT and Leeds City Council will work with the LEP to optimise the scope of the new buildings. If there are cost pressures and / or anticipated cost over-runs, the project will be re-scoped to remain within the funding envelope. However this will not be done at the expense of achieving educational transformation.

No additional sources of finance have been identified for this project.

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

### **ICT**

The price for the managed service will be no more than £225 per pupil per annum adjusted for inflation in subsequent years.

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

Capital Costs - The initial design option for the Academy have been fully costed and identifies 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 25 year period. The estimated annual cost is approximately £172,000 per annum and EACT have confirmed their commitment to meeting these costs through the GAG.

### **Facilities Management**

Life Cycle and Hard FM costs have been estimated for a 25 year period. EACT have confirmed their commitment to meeting these costs through the GAG to be received by the Academy.

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

- 6A. PfS Funding Allocation Model
- 6B. Leeds City Council cost estimate
- 6C. Schedule of abnormal costs
- 6D. Facilities Management cost estimate
- 6E. ICT cost estimate
- 6F. A letter from the Section 151 Officer confirming affordability of the scheme
- 6G. A letter from EACT confirming their commitment to investment in life cycle and hard facilities management costs
- 6H. A letter from EACT confirming their commitment to investment in ICT
- 6I. Letter from BECTA confirming that the ICT costings have been reviewed and are acceptable (To follow)

## 7 READINESS TO DELIVER

**Section 7** and **Appendix 7** of the OBC sets out Leeds City Council's project management structure. It also outlines the governance procedure put in place by Leeds City Council for managing BSF projects.

The Leeds West Academy project will be managed under the Delivering Successful Change (DSC) methodology. DSC is Leeds City Council's corporate approach to the management of its projects and programmes and is mandatory for all projects undertaken by the City Council.

Leeds City Council has an established governance procedure which sets out clearly the governance arrangements for the management of the Council's programmes and projects. The aim is to ensure its business change and related investment is fully aligned with strategic priorities and has an increased likelihood of success.

Leeds City Council's Code of Corporate Governance initially agreed on 27 July 2005 and revised on 19 March 2008 is a public statement that sets out the way in which the Council will meet that commitment. It is based on the following six principles which the project will adhere to:

- Focussing on the Council's purpose and community needs
- Having clear responsibilities and arrangements for accountability
- Good conduct and behaviour
- Taking informed and transparent decisions which are subject to effective scrutiny and risk management
- Developing the capacity and capability of members and officers to be effective
- Forming, encouraging and maintaining effective relationships with local people and stakeholders.

The governance arrangements for managing BSF projects align with the Council's governance protocols and are compliant with the Council's adopted standards for programme and project delivery, Delivering Successful Change (DSC).

## 7.1 Project Management

### 7.1.1 Management Arrangements

Leeds City Council has an established four-tier management structure which has been developed to ensure clear accountability for the delivery of each aspect of the project. These are:

- a) **Strategy** - Executive Board and Asset Management Group (AMG);
- b) **Portfolio/Programme** – PPP / PFI Projects Co-ordination Board;
- c) **Project** - Project Board;
- d) **Task** - Procurement Team.

#### **Strategy** - Executive Board

Under the LCC Constitution, all decisions within the Council must be taken by either full Council or the Council's Executive Board. The Council's Executive Board is the decision making body for matters relating to the scope of and affordability of the projects.

To facilitate delivery of BSF projects the Executive Board has delegated powers to the Director of Resources as Chair of both Asset Management Group (AMG) and PPP/PFI Projects Co-ordination Board. However, formal approvals are required from the Executive Board for the following:

- Corporate objectives of the project
- Resources required for project development, procurement and delivery
- Procurement model to be used
- Final scope and phasing of the project
- Overall resource allocation for the project
- Approval for the submission of the OBC to PfS
- Submission of the Final Business Case (FBC) to PfS.

## **Strategy – Asset Management Group**

The Chair of the AMG has the following delegations:

- Approval of PPP/PFI Project Mandates following a project feasibility study
- Submission of an EOI to a sponsoring Government Department in advance of the relevant meeting of the Executive Board, where project deadlines require urgent submission. A report will then be submitted to the next available Executive Board meeting seeking the retrospective support of Executive Board.

## **Portfolio / Programme – PPP/PFI Projects Co-ordination Board**

The role of the PPP / PFI Projects Co-ordination Board is to:

- Provide a delegated Governance and Performance Management role to the PPP / PFI Portfolio of projects on behalf of the Executive Board;
- Ensure that the PPP / PFI Portfolio of projects is strategically aligned to Corporate Partnership Plans;
- Scrutinise, challenge and approve PPP / PFI projects prior to submission to Executive Board;
- Identify cross cutting issues and where necessary approve policies and procedures to ensure consistent and equitable service delivery;
- Conduct an annual review of the effectiveness of the PPP / PFI governance framework drawing comparisons against such best practice indicators as are considered appropriate.

The quorum is the Chair plus two voting members, with each member able to propose a substitute attendee in their absence.

In addition, Project Sponsors, Chief Officer (PPPU), the Chief Executive of Education Leeds and other service directors as appropriate also attend Project Boards.

## **Project – Project Board**

Project Management is concerned with the management and delivery of projects. The Project Board will take delegated decisions on project specific issues. The Project Board will comprise of the following people:

### **Chair:**

- Portfolio Owner (Deputy Chief Executive);

### **Members:**

- Programme Director (Chief Officer PPPU);
- Project Sponsor (Service Directorate)
- Legal & Democratic Services (Assistant Chief Executive – Corporate Governance)
- Finance (Director of Resources)
- Development (Director of City Development)

In addition, an Education Leeds representative will attend and where required a representative from EACT will also attend.

For the Education portfolio this is currently in existence. It is envisaged that this forum will provide the project board governance required.

The Education Project Board already has authority delegated to it by the Council's Executive Board to take delegated decisions on project specific issues. The general role of the Project Board is to:

- Provide overall direction and manage implementation of the project;
- Review and approve all major plans ensuring that any major deviations in respect of time, cost and quality are escalated to PPP/PFI Projects Co-ordination Board and Executive Board as required;
- Ensure relevant updates and reports are presented to the PPP/PFI Projects Co-ordination Board and Executive Board as required;
- Determine the parameters within which the project is delivered;
- Promote the project within the Council;

- Ensure the Procurement Team receives the required support and responses from all appropriate Departments.

It has authority to make delegated decision on matters relating to New Project Procedures under BSF providing that there have been no changes in scope or affordability and is also subject to the conditions set by the Executive Board, e.g. affordability tolerance. These elements are listed below:

- Issue of City Council Requirements
- Stage 1 – Approval – Entering into Stage 2
- Stage 2 – Approval – Enter into Financial Close Negotiations

Appropriate client and project team staff will be invited to attend Project Board meetings as non-voting attendees as appropriate. The Council are currently assessing how this board will interface with the Academy Sponsor.

### **Task - Project Team**

The Project Team is a group of individuals with the required professional, technical and specialist skills who under the direction of the Executive Project Manager are responsible for carrying out the work required leading to the successful delivery of the project. They will adhere to the DSC methodology.

The project team will be responsible for: -

- Establishing the project objectives for each phase;
- Managing project risks;
- Ensuring that projects are adequately resourced ;
- Managing project development including:
  - Managing feasibility studies and options appraisals;
  - Developing and refining the EACT's Vision (with support from working parties as required);
  - Developing and refining the project scope;
  - Managing development of the Outline Business Case;
  - Organising Gateway Reviews and implementing recommendations as required by the Programme Board.

### Managing the procurement including:

- Developing the NPP documentation, proposed evaluation criteria and process, in line with PfS guidelines;
- Developing benchmarking procedures in line with PfS guidelines
- Evaluating NPP submissions and seeking clarifications as necessary;
- Preparing a NPP evaluation report with recommendation for consideration by the Project Board;
- Finalising Strategic Partnering Agreement and contract documentation;
- Preparing the Final Business Case;
- Organising Gateway Reviews as required.

### General project management:

- Managing project risks;
- Development and implementation of controls for cost, time and quality of the project;
- Providing regular progress reports to the Project Board
- Liaising with PfS and DCFS;
- Developing and updating the resource plan for the project
- Managing overall project management costs including in house resources and advisers
- Ensuring that the project team is adequately resourced and is discharging its functions.

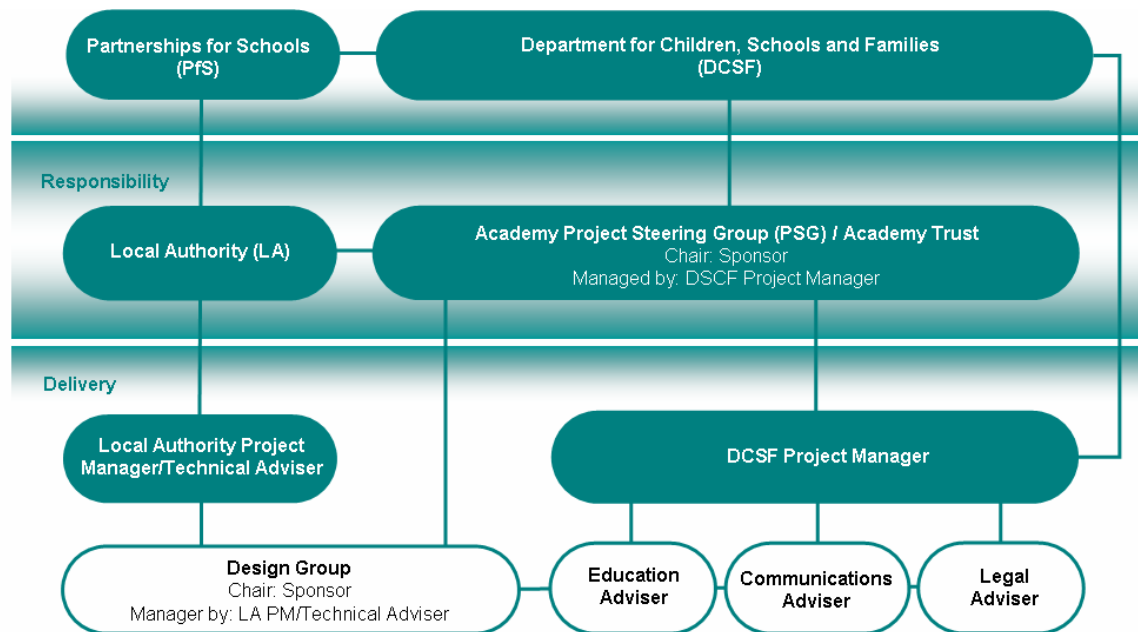
Leeds City Council has established and maintained a fully resourced project management regime for the successful delivery of the project.

<b>Role on Project</b>	<b>Position</b>	<b>Name</b>	<b>Time Commitment</b>
Owner	Deputy Chief Exec	Dave Page	P/T
Project Director	Director of Planning and Learning Environments	Jackie Green	P/T
Project Management	PPPU Executive Project Manager	Jill Gough	P/T
Project Management	PPPU Project Manager	Phil Smith	P/T
Project Support	PPPU Project Officer	Imtiaz Hasan	F/T
Project Support	PPPU Project Assistant	Martine Maxwell	P/T
Technical Advisors	Senior Technical Manager (EC Harris)	Jeff Gibson	P/T
LA Design Champion	Design Team Leader	Mark Burgess	P/T
Financial Advice	Executive Accountant (PPPU)	Matthew Cooper	P/T
Legal Advice	Project Solicitor (PPPU)	Jacqueline Ainsley-Stringer	P/T

The team proposed for the Leeds West Academy Project has significant experience gained from BSF Phase 1, 2 and 3 as well as other PFI projects successfully delivered by the Council which will benefit this project.

Leeds City Council, Education Leeds and EACT in conjunction with the 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 Local Authority Project Team.

The organisational structure for the project is represented in the following diagram:



The budget for procurement and delivery for the Leeds West Academy project has been estimated at £767,776. The budget has been approved and will be funded by Education Leeds. The procurement budget is monitored and reported monthly to the Education Project Board.

PfS has provided support during the project development, and has monitored progress to ascertain whether their requirements have been met. The PfS Project Director is Sally Wiseman.

## 7.2 Consultation and Statutory Approvals

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

Public Consultation	<p>Leeds City Council's Executive Board approved a public consultation on the Academy proposal to replace Intake High School Arts College in April 2008. This was following an Expression of Interest (EOI) naming EACT as the sponsor.</p> <p>The consultation ran from 8 September to 17 October 2008. Meetings were held with the school, staff, governing body and the general public. Area Committee and Schools Forum meetings were also organised and attended.</p> <p>In total the attendance at the various meetings were approximately 250 people (some of these attended more than one meeting). A total of 16 written responses were received. Five were broadly in support of the proposal, four neutral or with conditional support and seven were against.</p> <p>The main issues raised by the consultation can be summarised by the following key themes:</p> <ul style="list-style-type: none"><li>• <b>Theme 1:</b> Staffing Issues; employment rights and protection, staffing structure, pay and conditions, union recognition</li><li>• <b>Theme 2:</b> Details of the proposed academy; curriculum and specialism, admissions policy, exclusions policy, transition arrangements, 6<sup>th</sup> form, uniform, name specific facilities and rules. Why and how it would be better and improve outcomes for young people and the community, and how quickly.</li><li>• <b>Theme 3:</b> The need for new buildings and the arrangements for design, construction and transition.</li><li>• <b>Theme 4:</b> EACT as an organisation, their plans and background.</li><li>• <b>Theme 5:</b> Governance and process issues, local accountability</li><li>• <b>Theme 6:</b> Miscellaneous</li></ul>
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	<p>The Executive Board authorised Education Leeds to publish statutory notices to close Intake High School Arts College on 31 August 2009, conditional upon DCSF approval to open an academy on that site opening 1 September 2009.</p> <p>At the 4 March 2009 Executive Board, a report was submitted which informed the Board of the responses to the statutory notice for the proposal to close Intake High School Arts College. Executive Board approved closure of the school on 31 August 2009 with a view to reopening it as an Academy on the 1 September 2009.</p>
Planning	<p>The Leeds West Plans Panel has agreed to defer and delegate approval of the Outline Planning Application subject to referral to Government Office and outstanding issues with Sports England being resolved.</p> <p>The Project Team are confident that these conditions will be discharged appropriately.</p>
Sport England	<p>The team have met with Fiona Pudge (Planning Manager - Sport England) and have walked through the proposals to ensure that the sports provisions proposed during and after construction are adequate.</p> <p>As a statutory consultee Fiona Pudge has also been provided with a copy of the submitted Outline Planning Application. Fiona has proposed conditions which will be included in the decision notice to be issued by the Planning Authority.</p>
Section 77	<p>There is no proposal to dispose of school playing fields. The level of playing fields currently in place at Intake High Schools Arts College will remain when the new build Academy opens in 2011.</p>

### **7.3 Market Testing**

Not appropriate for a further Phase of the Leeds BSF Wave 1 Programme

### **7.4 Risk**

A risk workshop has been held and risks are recorded on the 'Risk Register', which the Project Manager will be responsible for maintaining. Risks will be assessed on a scale of Low, Medium, High and Very High depending on the probability and impact of each risk on the project.

The Risk Register will continue to be reviewed regularly and reported at each Project Board Meeting. The Project Manager will provide the Board with details of all significant risks to the successful delivery of the project.

The Project Team will adhere to the Public Private Partnership Unit's Risk Management guideline which has been approved by the Council's Risk Management Unit (RMU).

### **7.5 Summary**

The Council can confirm that Leeds City Council, Education Leeds and EACT in conjunction with the 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 Local Authority Project Team.

Leeds City Council has put in place the correct blend of resources to ensure the successful delivery of the project.

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 Application decision notice
- 7C. Letter from Sport England
- 7D. Section 77 Approval (not applicable)
- 7E. Risk Register (detailing top 10 risks)

## 8 MOVING FORWARD

**Section 8** and **Appendix 8** provides a critical review of the options appraisal through the completion of the DCSF Checklist. Also included in this section is 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, Leeds City Council's Project Team has also been developing the documents required to enter into Stage 1 of the NPP process.

- Meeting forums have been initiated between Leeds City Council, Education Leeds and the LEP based on a previously successful model used on other BSF schemes.
- An Output Specification detailing the City Council's and EACT's requirements has been developed.
- A robust Stage 0 process has been carried out to assess affordability and ensure that value for money can be achieved prior to entering into Stage 1.
- LEP Business Case has been developed to ensure all parties are signed up to the scheme's scope and cost before entering into Stage 1.
- A DQI workshop has been completed and further ones planned to ensure that the design of that a wide range of stakeholders have the opportunity to influence the design.
- Previous BSF Lessons Learned Reports have been interrogated to take into account lessons learned that could be successfully applied to the Leeds West Academy project.
- Roles and Responsibilities Matrices have been developed and approved by Leeds City Council, Education Leeds and EACT which also sets out the governance arrangements for the project.

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