

Report of the Built Environment Programme Manager

Report to the Head of Learning Systems, Children and Families

Date: 25th July 2017

Subject: Design & Cost Report & Tender Acceptance for the Learning Places 2017 Bulge Cohort – Immaculate Heart of Mary Catholic Primary School (Phase One)



Capital Scheme Number: 32450/BGE/IHM

Are specific electoral Wards affected?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, name(s) of Ward(s): Moortown		
Are there implications for equality and diversity and cohesion and integration?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
Is the decision eligible for Call-In?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
If relevant, Access to Information Procedure Rule number: 1. Appendix B – NPS Tender evaluation report [Commercially sensitive & confidential] 2. Appendix C – Rex Proctor & Partners tender report [Commercially sensitive & confidential]		

Summary of main issues

1. The purpose of this report is to seek approval to incur capital expenditure of £138,563.15 from capital scheme number 32450/BGE/IHM to deliver the identified essential additional teaching space required to facilitate the placement of a Learning Places 'bulge' cohort at Immaculate Heart of Mary Catholic Primary School. This work constitutes Phase One of two and relates to internal remodelling necessary to facilitate placement of the 'bulge' cohort. This provision will accommodate a 30 pupil bulge cohort due to occupy the school from September 2017.
2. As a consequence of rising birth rate, new housing developments and increased migration into the Moortown area there is a requirement to provide additional, temporary, accommodation at Immaculate Heart of Mary Catholic Primary School. This will support a one off 'bulge' cohort of 30 pupil places which are not currently available within the area of need.
3. This project will be delivered under the City Council's Learning Places Programme; which aims to ensure the Local Authority's statutory duties are met with respect to ensuring a school place for every child within the city.

4. The additional accommodation at Immaculate Heart of Mary Catholic Primary School will take effect from September 2017 and will allow the 30 place 'bulge' cohort to be accommodated for the commencement of the 2017/18 academic year. The admission limit for the school will rise for September 2017. Supplementary accommodation, in the form of a new extension to the reception classbase and internal remodelling to form a new key stage one classbase, are required as a consequence of placement of the 'bulge' cohort at Immaculate Heart.
5. Due to the accelerated delivery programme the work at Immaculate Heart has been split into two phases. Phase One will provide an additional classroom via internal remodelling and will facilitate access into the new reception classbase extension, which is to be delivered under Phase Two. This report relates to Phase One which will deliver the internal remodelling and one additional classroom, which will be used as a temporary provision until Phase Two is complete wherein it will be used as an additional classbase to allow the 'bulge' to progress through key stage one. Both phases are due to be delivered within the 2017/18 academic year.
6. The project is to be self-delivered by Immaculate Heart of Mary Catholic Primary School in conjunction with the Diocese of Leeds. Officers from Childrens & Families Built Environment team will provide general project support with Norfolk Property Services (NPS) Leeds providing a technical and evaluation role.

Recommendations

The Head of Learning Systems is requested to:

1. Authorise expenditure of £138,563.15 from capital scheme number 32450/BGE/IHM to allow Phase One of the 'bulge' cohort works at Immaculate Heart of Mary Catholic Primary School to commence over summer 2017. This works forms part of the Learning Places 2017 Bulge Cohort Programme.
2. Authorise acceptance of the tender submitted by Immaculate Heart of Mary Catholic Primary School in the sum of £106,464.50 for delivery of Phase One. This figure is inclusive of all fees and costs incurred directly by Immaculate Heart of Mary Catholic Primary School.
3. Note that the breakdown of project costs, highlighted in point 1 above, are detailed within section 5.5 of this report.
4. Note that this report refers to Phase One only, Phase Two will be subject to a separate programme and approvals report.
5. Note the programme dates identified in section 4.0 of this report in relation to the implementation of this decision. The final delivery date for this scheme is prior to the commencement of term September 2017.
6. Note that the officer responsible for implementation is the Head of Learning Systems, Children and Families.

1.0 Purpose of this Report

1.1. The purpose of this report is:

- To provide background information and detail to the Head of Learning Systems for Phase One of the proposed accommodation required at Immaculate Heart of Mary Catholic Primary School to accommodate the 'bulge' cohort of 30 pupils with effect from September 2017.
- Seek authority to incur capital expenditure of £138,563.15 to undertake the works included within Phase One.
- Seek acceptance of the tender submitted by the Immaculate Heart of Mary Catholic Primary School, in-line with the recommendations put forward by NPS Ltd. (Leeds) in their role as technical and financial advisor to the Authority, for the sum of £106,464.50 for the aforementioned works.

2.0 Background Information

- 2.1. The Learning Places programme represents the Council's response to the demographic growth pressures in primary school provision. The increasing birth rate in Leeds has required Leeds City Council to approve an increasing number of new reception places since 2009 in order to fulfil its statutory duty to ensure sufficiency of school places.
- 2.2. The scale of the response cannot be met through the existing estate; therefore the expansion of existing schools or the creation of new schools has been required in many instances. The capital school building solutions to the demographic need is managed via Childrens & Families Learning Places Programme.
- 2.3. For the upcoming academic year (September 2017 to July 2018) it was projected that at least 5FE / 150 places would be required across the city as temporary cohorts to meet bulges in demand or in advance of permanent solutions being secure for the longer term need. A programme of 'bulge' works has been developed to provide the necessary accommodation to meet this demand. Parental preference data has been used to determine the need in the pressure areas and site specific solutions have been developed as a result. These will be tailored to each specific site where a 'bulge' cohort is to be accommodated but includes; utilising extra capacity within existing buildings (where appropriate), internal remodelling and additional modular accommodation on a temporary and permanent basis (where applicable).
- 2.4. The proposal for Immaculate Heart of Mary Catholic Primary School will form part of the on-going work to address capacity and sufficiency across all of Childrens & Families; which includes provision for primary and secondary school places in addition to early years and specialist provision.
- 2.5. These proposals form part of the Council's Learning Places Programme that embeds the 'One Council' approach in terms of shared ownership of proposed solutions across the various departments involved.
- 2.6. Two phases of work are required to place a 30 pupil 'bulge' cohort at Immaculate Heart of Mary Catholic Primary School. The first phase, detailed herein, will consist of internal remodelling of existing spaces to form new circulation, ancillary facilities and one additional classbase. This classbase will serve the additional September

2017 reception cohort until Phase Two is complete. After this point this classroom will be utilised to allow the 'bulge' cohort to progress through key stage one. Phase Two consists of a new build extension to the reception classbase which will be delivered for circa November 2017 and, due to the tight programme and split tender process, will be subject to a separate design and cost report.

3.0 Main Points

3.1. Design Proposals and Full Scheme Description

Phase One of the proposed works at Immaculate Heart of Mary Catholic Primary School consists of the following components:

- Internal remodelling of the existing reception classbase to form circulation space to service Phase Two, additional welfare provision and one additional teaching space. This is to be used for temporary reception provision and then as an additional teaching space from September 2018 to allow the 'bulge' cohort to progress through the school.
- 3.2. The project consists of two phases, both of which are to be delivered during the 2017/18 academic year. This report refers to Phase One only. Phase Two will deliver a new build reception classbase for circa November 2017 and is subject to a separate design and cost report.
- 3.3. The estimate cost for Phase One is £138,563.15; this includes £106,464.50 for the tendered construction costs inclusive of fees, and £32,096.65 for furniture & equipment, NPS fees and a client held contingency commensurate with a project of this scale.
- 3.4. The project is to be self-delivered by Immaculate Heart of Mary Catholic Primary School in conjunction with the Diocese of Leeds. Officers from Childrens & Families Built Environment team will provide general project support with Norfolk Property Services (NPS) Leeds providing a technical and evaluation role. Immaculate Heart of Mary Catholic Primary have appointed their own architectural and technical team to deliver this project, and will in turn be responsible for compilation of the planning application and completion of any surveys.
- 3.5. A funding allocation has been awarded for the provision of furniture & equipment to support this additional classroom; this is included within this report and conforms to the standard allocation provided to support a 'bulge' cohort.
- 3.6. Any required Highways works, necessary as a consequence of this scheme, will be picked up under a separate programme-wide DCR's once the planning application has been approved. This will pick up all conditions from the planning process.
- 3.7. NPS Ltd. (Leeds) have been commissioned to provide the Authority technical and financial review services in order to ensure the scheme presents value and is technically sound. A tender evaluation has been completed by NPS based on the cost plan provided by Immaculate Heart of Mary Catholic Primary School. This document is appended to this report as 'Appendix B'.
- 3.8. Planning was submitted by the school's appointed architect on the 25th May 2017 and was subsequently determined on the 24th July 2017. The planning application refers solely to Phase Two; as such determination of this submission will have no impact upon Phase One being completed.

4.0 Programme

4.1. The works at Immaculate Heart of Mary Catholic Primary are to be delivered over two phases during the 2017/18 academic year. Phase One will provide the critical accommodation for commencement of the new term in September 2017.

4.2. The key milestones to achieve this programme are as follows:

- Pupil numbers confirmed April 2017
- Submission of planning application 25th May 2017
- Approval of authority to spend w/c 20th June 2016
- Planning determination date 24th July 2017
- Contract award / Authority to spend w/c 24th July 2017
- Start on-site w/c 24th July 2017
- Completion & handover w/c 4th September 2017
- Occupation w/c 4th September 2017

4.3. The approval of 'authority to spend', requested within this report, is on the critical path and therefore crucial to delivery of the project in accordance with the dates above.

4.4. Following consultation with Leeds City Council Planning Department it was determined that the works would require a full planning application; this has been compiled and submitted by the school's appointed architect. Determination of the planning application was completed on the 24th July 2017 with full planning permission granted. The elements within the planning submission refer solely to Phase Two works and have no impact upon progression of Phase One.

5.0 Corporate Considerations

5.1. Consultation and Engagement

5.1.1. The bulge cohort expansion programme required for 2017 has been subject to consultation with Childrens & Families' officers, school representatives, Highways, Planning, Procurement and senior elected members.

5.1.2. Pre-planning consultation has been held with representatives from the Planning Department and LCC Highways with a view to assessing the entirety of the 'bulge' programme required for a September 2017 implementation. No off-site Highways works have been identified as part of the planning determination.

5.1.3. Immaculate Heart of Mary Catholic Primary School has undertaken extensive consultation with the Diocese of Leeds who in turn supports the schools proposals and desire to self-deliver this scheme.

5.1.4. Childrens & Families will continue to brief elected members at key stages throughout the project development.

5.2. Equality and Diversity / Cohesion and Integration

5.2.1. The recommendations with this report do not have any direct nor specific impact upon any of the groups falling under the remit of the equality legislation and the need to eliminate discrimination and promote equality. A screening document has

been prepared to this effect and an independent impact assessment is not required for the approvals requested. The screening document has been sent to the Equality Team to be approved, publishing and held on-file. A copy is included with this report as appendix A.

5.3. Council Policies and Best Council Plan

- 5.3.1. This scheme is due to be delivered under the City Council's Learning Places Programme and is required to fulfil the Local Authority's statutory responsibility to provide sufficient school places. In providing places close to where the children live the proposals will improve accessibility of local and desirable school places, and thus reduce any risks of non-attendance.
- 5.3.2. This contributes to the 2017/18 Best Council Plan outcomes for everyone in Leeds to 'Do well at all levels of learning and have the skills they need for life'; 'Be safe and feel safe' and 'Enjoy happy, healthy, active lives'. It also supports the vision in the supporting Children and Young People's Plan 2015-19 to build a child-friendly city with a focus on ensuring all children and young people are safe from harm; do well at all levels of learning and have the skills for life; enjoy healthy lifestyles; have fun growing up; are active citizens who feel they have a voice and influence. The programme seeks to deliver a supply of good quality accessible local school places which can contribute to these outcomes.

5.4. Resource and Value for Money

- 5.4.1. The estimate cost for Phase One is £138,563.15; this includes £106,464.50 for the tendered construction costs inclusive of fees, and £32,096.65 for furniture & equipment, NPS fees and a client held contingency commensurate with a project of this scale.
- 5.4.2. The cost will be met through capital scheme number 32450/BGE/IHM as part of the Learning Places Programme.
- 5.4.3. Phase One of this project is to be self-delivered by Immaculate Heart of Mary Catholic Primary School in conjunction with the Diocese of Leeds. Officers from Childrens & Families Built Environment team will provide general project support with Norfolk Property Services (NPS) Leeds providing a technical and evaluation role.
- 5.4.4. The works detailed herein have been formally tendered via the schools appointed design partner. Four eligible tenders were received with Torpoint determined to be the winning bidder. The schools cost consultant, Rex Proctor & Partners, have evaluated the tender return and determined that the submission by Torpoint represents best value and recommends their formal appointment. Further details are noted in Appendix C to this report.
- 5.4.5. NPS Leeds, acting as consultant to the Authority, have reviewed the tender package and tender return information provided by the schools appointed design team. Comments and observations on the mechanical and electrical design have been provided and issued to the school for consideration. NPS have noted that the preliminaries are appropriate for a scheme this size and that the Torpoint tender return is competitive with no arithmetical errors or qualifications. Subject to addressing any design queries they have confirmed Rex Proctor & Partners assessment and recommended award of the contract to Torpoint.

5.5. Capital Funding & Cash Flow

Previous total Authority to Spend on this scheme	TOTAL £000's	TO MARCH 2017 £000's				
			2017/18 £000's	2018/19 £000's	2019/20 £000's	2020 on £000's
LAND (1)	0.0					
CONSTRUCTION (3)	0.0					
FURN & EQPT (5)	0.0					
DESIGN FEES (6)	0.0					
OTHER COSTS (7)	0.0					
TOTALS	0.0	0.0	0.0	0.0	0.0	0.0
Authority to Spend required for this Approval	TOTAL £000's	TO MARCH 2017 £000's				
			2017/18 £000's	2018/19 £000's	2019/20 £000's	2020 on £000's
LAND (1)	0.0					
CONSTRUCTION (3)	92.6		92.6			
FURN & EQPT (5)	13.5		13.5			
DESIGN FEES (6)	13.9		13.9			
OTHER COSTS (7)	18.6		18.6			
TOTALS	138.6	0.0	138.6	0.0	0.0	0.0
Total overall Funding (As per latest Capital Programme)	TOTAL £000's	TO MARCH 2017 £000's				
			2017/18 £000's	2018/19 £000's	2019/20 £000's	2020 on £000's
	0.0					
Basic Need Grant	138.6		138.6			
	0.0					
Total Funding	138.6	0.0	138.6	0.0	0.0	0.0
Balance / Shortfall =	0.0	0.0	0.0	0.0	0.0	0.0

Parent Scheme Number: 32450/000/000

Title: Basic Need Primary Expansion 2017/18

5.6. Revenue Effects

- 5.6.1. Any additional revenue consequences that may arise as a result of the project will be managed within the respective school budgets.

5.7. Legal Implications, Access to Information and Call-In

- 5.7.1. The approval of this report constitutes a 'Significant Operational Decision' and as such will not be subject to 'Call-In'.
- 5.7.2. Notification of this forthcoming key decision was published on 4th May 2017, with a decision implementation date of not before 30th May 2017.
- 5.7.3. Phase One of this project is to be self-delivered by Immaculate Heart of Mary Catholic Primary School in conjunction with the Diocese of Leeds. Officers from Childrens & Families Built Environment team will provide general project support with Norfolk Property Services (NPS) Leeds providing a technical and evaluation role.
- 5.7.4. There are no other legal implications or access information issues arising from this report.

5.8. Risk Management

- 5.9. Risk is to be managed through application of 'best practice' project management tools and techniques via the City Council's 'Delivering Successful Change' methodology. Experienced Project Management resource from Childrens & Families Built Environment team will be tasked with ensuring the project remains within the predetermined risk tolerances.
- 5.10. As a self-delivery project Immaculate Heart of Mary Catholic Primary will be responsible for day-to-day management of this project and its associated risks. Childrens & Families Officers will provide high level support throughout the project programme as part of the wider Learning Places Bulge Cohort Programme 2017.
- 5.11. A programme level risk log has been maintained throughout the project and escalation is via Basic Need Programme Manager.

6.0 Conclusions

- 6.1. As a result of a temporary increase in pupil numbers for the 2017/18 academic year throughout the city it is necessary to provide supplementary teaching accommodation to accommodate the identified 'bulge' cohorts. Immaculate Heart of Mary Catholic Primary School has been identified as a key site for addressing the need for pupil places in the Moortown area.
- 6.2. The provision of the new accommodation at Immaculate Heart of Mary Catholic Primary School will be self-delivered by Immaculate Heart of Mary Catholic Primary School in conjunction with the Diocese of Leeds. Officers from Childrens & Families Built Environment team will provide general project support with Norfolk Property Services (NPS) Leeds providing a technical and evaluation role. The cost of the accommodation, and necessary supporting works, will be met through capital scheme 32450/BGE/IHM to the value of £138,563.15.
- 6.3. The requirement to provide additional accommodation at Immaculate Heart of Mary Catholic Primary School for a September 2017 delivery has been developed through continued consultation with the appropriate stakeholders.
- 6.4. The cost of the works detailed within section 3 will be met through capital scheme 32450/BGE/IHM to the value of £138,563.15.

7.0 Recommendations

- 7.1. The Head of Learning Systems is requested to:
 - 7.1.1. Authorise expenditure of £138,563.15 from capital scheme number 32450/BGE/IHM to allow Phase One of the 'bulge' cohort works at Immaculate Heart of Mary Catholic Primary School to commence over summer 2017. This works forms part of the Learning Places 2017 Bulge Cohort Programme.
 - 7.1.2. Authorise acceptance of the tender submitted by Immaculate Heart of Mary Catholic Primary School in the sum of £106,464.50 for delivery of Phase One. This figure is inclusive of all fees and costs incurred directly by Immaculate Heart of Mary Catholic Primary School.
 - 7.1.3. Note that the breakdown of project costs, highlighted in point 1 above, are detailed within section 5.5 of this report.

- 7.1.4. Note that this report refers to Phase One only, Phase Two will be subject to a separate programme and approvals report.
- 7.1.5. Note the programme dates identified in section 4.0 of this report in relation to the implementation of this decision. The final delivery date for this scheme is prior to the commencement of term September 2017.
- 7.1.6. Note that the officer responsible for implementation is the Head of Learning Systems, Children and Families.

8.0 Background Documents¹

- 8.1. None

¹ The background documents listed in this section are available to download from the Council's website, unless they contain confidential or exempt information. The list of background documents does not include published works.