LEEDS BUILDING SCHOOLS FOR THE FUTURE PROGRAMME

PHASE 4

Leeds West Academy

Final Business Case

February 2010
## DOCUMENT CONTROL

### Revision History

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EXECUTIVE SUMMARY

Introduction
This Final Business Case (FBC) has been prepared to confirm the viability of procuring Leeds West Academy as a Design and Build project using conventional funding.

Leeds West Academy will be procured through the Local Education Partnership (LEP), subject to approval of this FBC and successful progress though the New Projects Procedure (NPP).

The Sponsor is Edutrust Academies Charitable Trust (EACT) who is one of the largest multi-academy sponsors, EACT is opening new academies as part of a major programme of investment in educational centres of excellence.

More than Six thousand students and One thousand staff have joined EACT academies in London, Birmingham, Sheffield and Leeds, with more set to transfer in 2010.

Overview and Commitment

Section 1 and Appendix 1 of this FBC describes the Scheme and confirms the commitment of all parties to the solution developed by the LEP.

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 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.

On the 31st August 2009 Intake High School Arts College formally closed and opened as Leeds West Academy on the 1st September 2009.

The design developed by the LEP has been signed off by EACT. A Reserved Planning Application was submitted on the 21st December 2009 and a decision on this is expected in February 2010.

EACT and Leeds City Council can confirm that the standard Development Agreement, developed by PfS, is currently being negotiated between both parties and is due to be signed on the 15th March 2010, will be used.

The Funding Agreement, Deed of Gift and all associated documents have
been signed and the Academy Trust is in place.

The Procurement Strategy

Section 2 and Appendix 2 of this FBC describe the details of the scheme.

The scheme is a single school project and includes the design and construction of 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 the 3rd April 2007 with Leeds City Council. The exclusivity afforded is dependent on the LEP successfully proceeding through two approval stages.

On the 9th October 2009, the LEP submitted their NPP Stage 1 proposal which was evaluated and subsequently approved by the City Council. On the 16th November 2009 the council wrote to the LEP inviting them to enter into NPP Stage 2.

Facilities Management

Section 3 and Appendix 3 of this FBC detail the proposals for the provision of Life Cycle and Hard FM.

EACT will 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 across their Academies.
ICT Procurement

Section 4 and Appendix 4 of this FBC describe the ICT procurement carried out, and the interface with the procurement and delivery of the building.

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 be procuring a fully managed ICT service from Research Machines Education Plc (RM) who is also the Council’s Strategic ICT partner. They will provide the ICT provision for Leeds West Academy.

In addition to attending design meetings and feeding into the design process both EACT and RM have put processes in place to ensure that there is a close link between ICT delivery and the design and build programme.

Affordability

Section 5 and Appendix 5 of this FBC set out the affordability position of the whole scheme.

The Academy will be procured through the LEP as a 100% new build using £33,348,000 of funding which was approved by PfS in August 2009. This amount includes £350,000 for highways works and an additional £45,000 for abnormals compared to Outline Business Case.

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.

Design and Build Contract and Development Agreement

Section 6 and Appendix 6 of this FBC detail any derogations from the Design and Build Contract(s) and Development Agreement used with the PfS National Framework.

The derogations to the Design and Build Contract are provided in Appendix 6. This is the current list as of 11 February 2010 and is subject to change during NPP2.
Readiness to Deliver

Section 7 and Appendix 7 of the FBC sets out the personnel of the Project Team. It also sets out the arrangements for supervising the delivery of the Design and Build and ICT contracts, and confirms that the necessary statutory approvals are in place.

Leeds City Council’s Project Team for 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’.

EACT’s Project Team also has significant amount of experience gained from delivering the first purpose built EACT academy in Gainsborough, Lincolnshire. The £35 million Trent Valley Academy boasts hi-tech facilities in a state-of-the-art new building.

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.

The supervision of the Design and Build contract will be undertaken by Leeds City Council’s Public Private Partnerships Unit’s (PPPU) Technical Team.

The supervision of the ICT contract will be undertaken by EACT’s Director of IT.
1 OVERVIEW AND COMMITMENT

Section 1 and Appendix 1 describe the Scheme and confirm the commitment of all parties to the solution developed by the Selected Panel Member.

Drafting Note: We expect this section to be approximately [4] pages in length.

1.1 Strategic Overview

Drafting Note: This should provide a brief overview of the key strategic objectives as detailed in the OBC and confirm that they are fully reflected in the FBC proposals.

If there are any changes or developments to the position stated in the OBC they should be indicated here and detailed in full.

Where there are changes, the LA should explain the approvals process and stakeholder consultation process followed to secure buy-in to the changes locally and nationally (DCSF, PfS).

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.

Leeds City Council’s vision for education, as stated in the Leeds Strategic Plan is:

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

To realise its ambition for education, Leeds City Council formed Education Leeds in April 2001, a not for profit organisation wholly owned by the Council.

Education Leeds’ vision for education 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’.
The aims, objectives and outcomes of the Leeds BSF Programme in relation to this phase are detailed below:

**Aims**

- To provide a framework for the transformation of teaching and learning at Leeds West Academy
- To contribute to the realisation of the Vision for Leeds 2004 - 2020
- To improve learning and achievement at Leeds West Academy
- 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\textsuperscript{st} century curriculum
- 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 a brand new state of the art Academy able to meet 21\textsuperscript{st} Century expectations in terms of 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
Outcomes

- Leeds West Academy will be a high achieving school providing a curriculum that 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 where all children and young people achieve success and have access to the highest quality of 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 above aims, objectives and outcomes are shared by EACT who are committed to delivering excellence in education for all in every one of its Academies. At Leeds West, EACT is developing a Centre of Excellence through innovative approaches to teaching and learning.

The focus of EACT is supporting young people to achieve their true potential. It is committed to significantly improving student ambitions, aspirations, learning, achievement and personal development, irrespective of their ability, gender, faith or race.

A Benefits Realisation Plan has been developed in partnership with EACT clearly showing what will happen, where and when benefits will occur and who will be responsible for their delivery. There is a tracking process which monitors achievement of benefits against expectations and targets.

The Academy will compliment the transformation that has and is currently taking place in education in Leeds as part of the BSF Wave 1 programme and will move Leeds a step closer to realising its vision for education.
1.2 The Scheme

**Drafting Note:** This should provide a brief overview of the Scheme procured. It should include:

- The number of schools in the scheme
- For each school it should detail:
  - The Sponsor/Academy Trust
  - The predecessor school
  - The opening date for the Academy
  - The Academy specialisms
  - The age range
  - The capacity (pupil numbers)
  - The opening date for new buildings

If there are any changes or developments proposed, as a result of work since OBC (for example changes to proposed scope of works), they should be indicated here and be detailed in full.

Where changes are have been made, the LA should explain the approvals process and stakeholder consultation process followed to secure buy-in to the changes locally and nationally (DCSF, PfS).

The key details for Leeds West Academy are set out in the table below:

Fig 1: Key Data: Leeds West Academy
Since September 2009 the Academy has been operating from the existing buildings. The Education Brief, including the curriculum model and accommodation schedule has been developed and signed off by the Project Steering Group (PSG) as well as by the DCSF and PfS. The accommodation schedule for Leeds West Academy has been developed using BB98 guidance.

The accommodation schedule approved in the OBC was 12210m² which is still the position.

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.

Leeds City Council is committed to engaging local people in decisions about their neighbourhood and community and helping to shape local services. ‘Our young people equipped to contribute to their own and the city’s future well being and prosperity’ is a strategic outcome Leeds City Council would like to see in people’s lives by 2011. (The Leeds Strategic Plan 2008 -2011).

There has been considerable stakeholder input into the design of the Academy. To date there have been three consultation events attended by local people. These were held to provide the local community with information about the scheme as it was developing as well as maintaining their support.

Briefings were also held with the local elected Councillors to keep them abreast of developments and to maintain their support.

1.3 **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.

EACT has been fully involved in the work to develop the detailed designs through the Design Development Meetings and confirms that the designs support the Education Brief developed for the Academy.

EACT and Leeds City Council can confirm that the standard Development Agreement, developed by PfS, is currently being negotiated between both parties and is due to be signed on the 15th March 2010, will be used

EACT and Leeds City Council confirm their commitment to working together to procure the design and construction of the new Academy using the LEP. The Roles and Responsibilities Matrices, developed at NPP1 and submitted as part of the OBC, have been revised to reflect the change in the roles and responsibilities of the parties involved as the project has developed.

The matrices have been signed off by Leeds City Council, Education Leeds and EACT. The matrices define the roles and responsibilities of those stakeholders involved in the project.
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.

In agreement with EACT, the City Council ceased the DUG meetings and the terms of reference previously assigned to this group were passed to members of the Design Development Meetings.

The Design Development Meetings took place weekly and were attended by EACT, Education Leeds, PPPU, LEP and Interservice.

The role of these meetings was to ensure:

- The Education Vision was met
- EACT had an opportunity to ensure that their vision, ethos, organisational and curriculum needs for the Academy were reflected in the design
- The design proposals were within the agreed funding envelope (LCC accountable for delivery within budget)
- All relevant stakeholders were consulted on the design.

There are no changes or further developments to the position stated in the OBC for Leeds West Academy which was approved by PfS in August 2009.

1.4 Summary

The Scheme involves replacing the current existing Academy buildings (previously known as Intake High School Arts College) with a new purpose built Academy.

The design developed by the LEP has been signed off by EACT.

EACT and Leeds City Council can confirm that the standard Development Agreement, developed by PfS, has been agreed and is ready to sign.

EACT and Leeds City Council can confirm that the standard Development Agreement, developed by PfS, is currently being negotiated between both parties and is due to be signed on the 15th March 2010, will be used.

There are no changes or further developments to the position stated in the OBC for Leeds West Academy which was approved by PfS in August 2009.
The following documents are attached at **Appendix 1**:  
- Benefits Realisation Plan  
- Roles and Responsibilities Matrices  
- Accommodation Schedule that demonstrates an area based on the BB98 gross internal floor area allocation  
- A letter of support from EACT  
- A letter of support from the Leeds City Council  
- Papers and minutes of Leeds City Council’s Executive Board meeting confirming approval for the project

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1 Sponsors/Academy Trusts have requested that their interests are protected in relation to the Design and Build Contract. The FBC will not be approved until a signed letter of support has been received from the Sponsor/Academy Trust.
2 PROCUREMENT STRATEGY

Section 2 and Appendix 2 of this FBC describe the details of the scheme to be procured through the LEP.

The Scheme is a Single School Project and includes the design and construction of Leeds West Academy and will be procured through the Leeds’ Local Education Partnership (LEP). The scheme also includes the demolition of the existing buildings and the reinstatement of the playing fields.

The FBC demonstrates that the process followed for the procurement of the new Academy:

- was in compliance with the Strategic Partnership Agreement (SPA) signed on 3 April 2007 between the City Council and the LEP
- allowed for a sufficiently robust analysis of the LEP’s proposed solution included in its NPP Stage 1 and 2 submission
- ensured that the LEP’s proposed solution offered value for money through the undertaking of meaningful appraisal and robust challenge
- enabled EACT to fully engage in the design process
- was well resourced and the City Council’s procurement costs have been minimised and documented.

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 Target Cost version of the Partnerships for Schools standard form Design and Build contract.

### 2.1 Procurement Costs

**Drafting Note:** This section should include a brief summary of the costs of the procurement, broken down into the following categories:

- External advisor costs (by type, i.e. financial, legal, technical, etc.).
- Internal project management costs.
- Internal advisor costs.
- Additional costs, e.g. stakeholder consultation.

If the costs of the procurement are in excess of the LA’s original budgeted estimates, the FBC should include an explanation of why this occurred, and how the LA would propose to minimise such costs for future procurements.

The table below shows the procurement costs for the project. These are within the Councils’ original estimated costs for the project.
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### 2.2 Carbon Reduction

**Drafting Note:** This section should confirm that the Selected Panel Member has prepared a design that will achieve a minimum of 60% Carbon Reduction, and that this has been demonstrated by the Carbon Calculator.

In the OBC for Leeds West Academy, the City Council, Education Leeds and EACT stated their commitment to ensuring the new Leeds West Academy will be capable of reducing carbon emissions by 60%.

Measures to reduce carbon emissions include:

- Automatic lightning control and lighting efficiency
- Zero carbon technologies
- ICT low energy equipment (Thin (80%) and Fat Client (20%))

The design proposed by the LEP will achieve a minimum of 60% carbon reduction and this has been demonstrated by the Carbon Calculator.
2.3 Summary

The SPA signed by all parties at Financial Close on 3rd April 2007, provided contractually, for Leeds LEP to benefit from a measure of exclusivity subject to the terms set out in the SPA. These terms are encapsulated within the SPA in the New Projects Procedures.

The LEP has prepared a design that will achieve a minimum of 60% Carbon Reduction, and this has been demonstrated by the Carbon Calculator.

The following documents are attached at Appendix 2:

- A detailed programme of work going forward (Gantt chart, including ICT development and procurement)
- Report on Carbon Reduction for Leeds West Academy
- The Carbon Calculator
3 FACILITIES MANAGEMENT

Section 3 and Appendix 3 of this FBC detail the proposals for the provision of Life Cycle and Hard FM.

Drafting Note: The Academy Trust set out their strategy for delivering life cycle and hard FM services in the OBC. This section should summarise the strategy and confirm that there has been no change to the strategy, or detail any changes made since OBC.

EACT will seek to provide its own life cycle and hard FM services where it is possible for it to do so. EACT recognises the importance of maintaining the enhanced facilities it will be responsible for when Leeds West Academy occupies its new buildings and commits to doing so to comply with both government and Leeds City Council requirements.

The Academy currently employs 2 site supervisors and 2 environmental workers and where possible all facilities maintenance is provided in house.

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 does buy in services where specialist skills are required. This includes larger scale decorating or landscaping works and also specialist electrical, environmental and other specialist skills. EACT anticipate also procuring similar services for Leeds West Academy to ensure that all facilities management requirements and regulations are fulfilled.

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.

EACT can confirm that there have been no changes to the FM strategy since the OBC was approved.
3.1 **Summary**

EACT has set out their strategy for delivering life cycle and hard FM services. It 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).

The following documents are attached at *Appendix 3*:

- NOT USED
4 ICT PROCUREMENT

Section 4 and Appendix 4 of this FBC describe the ICT procurement carried out, and the interface with the procurement and delivery of the building.

The ICT capital budget for hardware which is currently £1,450 per pupil is to be delivered to EACT to procure ICT solution.

4.1 ICT Procurement

Drafting Note: Provide details of the ICT procurement carried out, including confirmation of the bidders involved and the evaluation process.

As part of BSF Phase I, Leeds City Council procured a Strategic Partner for ICT, Research Machines, 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. RM Education PLC was appointed as the ICT Strategic Partner in May 2007.

RM’s involvement in Leeds is much more than hardware and software supply and maintenance. It is about providing strategic support to schools, professional development for all staff and ensuring that the technology in schools is relevant and robust to deliver on EACT’s ICT vision for radically different learning environments.

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; and
- Continuing Professional Development services

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

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

EACT has worked closely with RM to develop outline costings and is liaising currently with both the Academy and RM at a more detailed
level to establish precise ICT requirements.

4.2 **Interface with Design and Construction Contract**

*Drafting Note:* This section should set out an explanation as to how the ICT solution has been aligned with the design and build solution for the school(s).

This section should also identify and explain the plan and controls in place for the management of interface risks.

EACT’s ICT team and RM have been involved throughout the design workshops and design process and have attended the Design Development Meetings. EACT also issued the design and build team high level guidelines for the impact of ICT upon the construction, based upon previous experience of building an academy.

RM will work with the Design and Construction Partner, EACT, Leeds West Academy and the Council:

- 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/team both within EACT and RM to scope, agree and implement the ICT solutions. These will hold regular reviews with the Design and Construction Partners.

The alignment of and the Design and Construction is highlighted as one of the top 10 risks to the Scheme.

4.3 **Summary**

EACT has procured the ICT provision through Research Machines.

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

A detailed risk register for the ICT project been developed and a clear strategy to manage / mitigate ICT risks has also been put in place.
The following documents are attached at **Appendix 4**:  
- ICT Risk Matrix (identifying the top 10 risks)  
- Letter from BECTA confirming that delivery approach for ICT provision has been reviewed and is acceptable²  

² Note that a template BECTA letter has not been developed. The BECTA advisor will supply a short note confirming that the ICT aspects of the project are acceptable. The form of the letter will depend on progress made on ICT procurement since OBC.
5 **AFFORDABILITY**

*Section 5* and *Appendix 5* of this FBC set out the affordability position of the whole scheme.

The FBC and the appendices to it confirm that the price submitted by the LEP is affordable to the City Council and remains good value for money for the Public Sector.

There has been no material difference in the scope of the procured solution to the scope of the project from what was set out in the OBC.

5.1 **Design and Construction**

*Drafting Note:* This section should set out in tabular format the funding approved at OBC against the costs from the Selected Panel Member.

The LA should confirm that it has checked, where relevant, the Selected Panel Member’s costs against the agreed rates in the National Framework Agreement, and confirm that the overall solution is ‘on market’.

The LA should identify any gap between the Selected Panel Member’s costs and agreed funding. An explanation as to how any funding gap will be met should be provided and detailed.

The LA should detail any monies identified by the Authority that might be required to be used in order to share additional costs where the actual cost outturn is above the target cost and is subject to the cost sharing provisions of the D&B contract.

Leeds City Council can confirm that it has checked the LEP’s cost against the FAM and OBC estimate, and confirm that the overall solution is ‘on market’.
<table>
<thead>
<tr>
<th>Category</th>
<th>Approved OBC Estimate (£)</th>
<th>Cost of Solution from the LEP</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Costs (incl contingency &amp; other)</td>
<td>20,424,655</td>
<td>22,496,751</td>
<td>2,072,096</td>
</tr>
<tr>
<td>External Works</td>
<td>3,659,905</td>
<td>1,935,636</td>
<td>-1,724,269</td>
</tr>
<tr>
<td>Abnormals*</td>
<td>2,628,535</td>
<td>1,179,384</td>
<td>-1,449,151</td>
</tr>
<tr>
<td>Fees</td>
<td>3,309,836</td>
<td>2,352,700</td>
<td>-957,136</td>
</tr>
<tr>
<td>FFE</td>
<td>Incl above</td>
<td>2,103,200</td>
<td>2,103,200</td>
</tr>
<tr>
<td>ICT Infrastructure</td>
<td>Incl above</td>
<td>Incl above</td>
<td>0</td>
</tr>
<tr>
<td><strong>Carbon Reduction</strong></td>
<td><strong>755,250</strong></td>
<td><strong>755,250</strong></td>
<td>0</td>
</tr>
<tr>
<td><strong>Local Authority Works</strong></td>
<td><strong>350,000</strong></td>
<td><strong>350,000</strong></td>
<td>0</td>
</tr>
<tr>
<td><strong>D&amp;B Contract sub-total</strong></td>
<td><strong>31,128,181</strong></td>
<td><strong>31,172,921</strong></td>
<td><strong>44,740</strong></td>
</tr>
<tr>
<td>Project Support Funding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ICT Hardware</td>
<td>2,175,000</td>
<td>2,175,000</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>33,303,181</strong></td>
<td><strong>33,347,921</strong></td>
<td><strong>44,740</strong></td>
</tr>
</tbody>
</table>

It should be noted from the above table that the Capex cost to the City Council is within the affordability parameters agreed by the City Council.

Notes:

Location Factor: 1.03

*Includes £445K abnormals approved by PfS in August 2009, £45K of which was not included in the OBC
5.2 **Lifecycle/Hard FM costs**

*Drafting Note:* This section should set out the costs identified to deliver the lifecycle and hard FM provision over a 25 year period.

The Academy Trust who FM should identify how these costs will be met and how they compare to the current budgeted spend on school’s maintenance/lifecycle programme. Any risk monies associated with possible variations from planned maintenance expenditure should be identified.

If there has been any change in estimates since OBC, there should be an in principle agreement from the Academy Trust to meeting the required life cycle and hard FM, confirmed in writing.

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 2010/11.

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.
5.3 **ICT**

*Drafting Note:* The Academy Trust should confirm that that the cost of the ICT solutions offered by ICT bidders are ‘on market’.

This section should set out the cost estimates for the ICT solution across the whole project and should include:

- The indicative capital costs of the selected ICT option;
- Monies required to maintain the operational and maintenance (revenue) costs;
- Any monies associated with installation, implementation & transition; and
- Where applicable supplementary costs associated to flexibility and scalability of selected ICT option are available.

The section should illustrate how the capital costs of the selected ICT option will be met and the means by which the maintenance and lifecycle costs for any ICT works will be afforded.

The ICT capital budget for hardware (£1,450/student) and infrastructure capital budget (£225/student) is to be delivered to EACT via the existing ICT Strategic Partner arrangement.

The following costs are estimates, based upon the current understanding of requirements, student numbers and estimated costs from RM:

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner PCs and laptops</td>
<td>£377,000</td>
</tr>
<tr>
<td>Admin PCs</td>
<td>£208,000</td>
</tr>
<tr>
<td>Teacher laptops</td>
<td>£32,000</td>
</tr>
<tr>
<td>Classroom A/V</td>
<td>£82,000</td>
</tr>
<tr>
<td>Multimedia hardware/software</td>
<td>£60,000</td>
</tr>
<tr>
<td>Printers</td>
<td>£30,000</td>
</tr>
<tr>
<td>Sustainability fund</td>
<td>£540,000</td>
</tr>
<tr>
<td>Hardware support</td>
<td>£70,000</td>
</tr>
<tr>
<td>Local choice</td>
<td>£60,000</td>
</tr>
<tr>
<td>Servers and related equipment</td>
<td>£100,000</td>
</tr>
<tr>
<td>Networking</td>
<td>£135,000</td>
</tr>
<tr>
<td>Desktop software</td>
<td>£106,000</td>
</tr>
<tr>
<td>Server/network software</td>
<td>£85,000</td>
</tr>
<tr>
<td>Curriculum software</td>
<td>£15,000</td>
</tr>
<tr>
<td>Implementation</td>
<td>£225,000</td>
</tr>
<tr>
<td>Training</td>
<td>£50,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>£2,175,000</strong></td>
</tr>
</tbody>
</table>
Indicative on-costs from RM are c.£172,000 per annum; this equates to an average cost per student of around £115.

This places it well within the national range of £100 - £200 per student and is comparable with Sandwell who are believed to have negotiated a cost of around £120 per student.

The costs from the implementation will be met fully by the ICT Capital Grant.

There will be retention of 25% of the ICT capital investment (costed into figures above) 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 planned use of energy efficient technologies will also allow the refresh window to be extended as these tend to be lower maintenance and have longer lifecycles.

5.4 Other sources of funding

_Drafting Note:_ This section should detail any additional central government or other agency funding that is available for this phase of work, the extent to which the affordability of the projects or ICT relies on this funding, and any restrictions or risks associated with the securing of such funding.

In particular the Authority should set out its strategy for using funds from any land receipts from the disposal of any land as part of the development process in accordance with the PfS Funding Guidance document which can be found on the PfS website [www.p4s.org.uk/library/bsf_guidance.jsp#FundingGuidance](http://www.p4s.org.uk/library/bsf_guidance.jsp#FundingGuidance).

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 Stop 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 Highways Maintenance Section

Leeds City Council’s Planning and Development Services department have been engaged by the Project Team to undertake this work. A quote to undertake the off site works will be provided by the end of March 2010.
There are no additional central government or other agency funding that is available for this project.

5.5 **FBC Required KPI Data**

The KPI Data required by PfS has been completed and appended to the FBC.

5.6 **Summary**

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

The analysis indicates that the LEP’s proposals are affordable within the funding.

**Design and Construction**

The LEP’s solution for the Scheme has been fully costed. The cost estimate has been checked against the rates included in PfS’ National Framework Agreement.

The capital costs fit within the funding approved at OBC.

**Facilities Management**

Life Cycle and Hard FM costs have been estimated for a 25 year period. EACT has confirmed their commitment to meeting these costs through the General Annual Grant (GAG).

**ICT**

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

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

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

ICT costs have been estimated for a 25 year period. The estimated annual cost is c.£172,000 and EACT has confirmed their commitment to meeting these costs through the General Annual Grant (GAG).
The following documents are attached at **Appendix 5**

- * Financial and Technical Proformas
- FBC Required KPI Data

* To be issued as part of NPP2
6. DESIGN AND BUILD CONTRACT AND DEVELOPMENT AGREEMENT

Section 6 and Appendix 6 of this FBC detail any derogations from the Design and Build Contract(s) and Development Agreement used with the PfS National Framework.

Drafting Note: The Academy Trust/Sponsor and/or LA should discuss and agree all derogations with PfS prior to submitting an FBC. The National Framework operates under the EU Restricted Procedure, so derogations must be limited to local project specifics.

The City Council has used the documentation signed for BSF Phase 1 as the initial template for the procurement of Leeds West Academy. This documentation was itself based on standard form documentation issued by PfS.

The City Council made a number of project specific amendments to the standard form documentation in BSF Phase 1 which have been approved by PfS.

A further limited number of amendments specific to the Leeds West Academy project will be submitted to PfS for approval. These amendments will need to be formally approved by PfS prior to approval of this FBC.

The City Council remains on programme to achieve contractual and financial close on the 30th April 2010.

5.7 Summary

Leeds City Council has drafted the Design and Build Contract(s) and will be negotiating agreement of this document with the LEP during NPP Stage 2. The contract has been reviewed and all derogations have been issued to PfS for assessment and approval prior to the financial close date.

All land transactions associated with the project and Reviewable Design Data have been agreed.

Leeds City Council and EACT have agreed the Development Agreement and it is ready to sign. The agreement has been reviewed and all derogations have been issued to PfS for assessment and approval prior to financial close.
The following documents are attached at Appendix 6:

- Schedule of agreed derogations to the Design and Build Contract
- Schedule of agreed derogations to the Development Agreement (To follow)
6 READINESS TO DELIVER

Section 7 and Appendix 7 of the FBC sets out the personnel of the Project Team to illustrate that the Local Competition has been resourced appropriately. It also sets out the arrangements for supervising the delivery of the Design and Build and ICT contracts, and confirms that the necessary statutory approvals are in place.

*Drafting Note: This section should be no more than 4 pages in length.*

6.1 Project Management Through the Local Competition

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

<table>
<thead>
<tr>
<th>Role on Project</th>
<th>Position</th>
<th>Name</th>
<th>Time Commitment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>Deputy Director of Children’s Services</td>
<td>Keith Burton</td>
<td>P/T</td>
</tr>
<tr>
<td>Project Director</td>
<td>Director of Planning and Learning Environments</td>
<td>Jackie Green</td>
<td>P/T</td>
</tr>
<tr>
<td>Project Manager</td>
<td>Team Lead</td>
<td>Craig Taylor</td>
<td>F/T</td>
</tr>
<tr>
<td>Technical Advisors</td>
<td>Senior Technical Manager (EC Harris)</td>
<td>Jeff Gibson</td>
<td>P/T</td>
</tr>
<tr>
<td>Leeds City Council Design Champion</td>
<td>Design Team Leader</td>
<td>Mark Burgess</td>
<td>P/T</td>
</tr>
<tr>
<td>EACT Design Adviser</td>
<td>Head of Design and Architecture</td>
<td>Yasmin Shariff</td>
<td>P/T</td>
</tr>
<tr>
<td>ICT Advisers</td>
<td>Project Manager Leeds BSF - ICT</td>
<td>Paul Craggs</td>
<td>P/T</td>
</tr>
<tr>
<td>Legal Adviser</td>
<td>Project Solicitor</td>
<td>Jacqueline Ainsley-Stringer</td>
<td></td>
</tr>
</tbody>
</table>
In addition, PfS has provided support during procurement and has monitored progress to ascertain whether their requirements have been met. The PfS Project Director is Kevin Crotty.
6.2 **Supervising and Monitoring the Delivery of the D&B Contract**

*Drafting Note: The LA should set out the arrangements it has put in place for supervising and monitoring the works, confirming the approved budget.*

Throughout the delivery stage the work-stream leaders (supported as appropriate) will check compliance with the contract requirements and processes dealing with issues as they arise. Workstreams will co-ordinate and co-operate with each other to ensure cross-cutting issues are adequately addressed on an ongoing basis.

**Workstreams**

**Overall Leads:**
Stuart Gosney (Education Leeds),
Terry White (PPPU)

**Design and Construction:**
Terry White (PPPU)
Jeff Gibson (EC Harris)
Construction Monitor (PPPU) TBA

**Stakeholder Management:**
Debra Penny (Education Leeds)

**Finance:**
Matthew Cooper (PPPU)
Gordon Mitchell, (Education Leeds Finance)
Mark Woodward (EC Harris)

**Legal:**
Jacqueline Ainsley-Stringer (PPPU)

**Project Management:**
Paul Kennedy, Jay Patel, Terry White (PPPU)
Craig Taylor, Imtiaz Hasan, Martine Maxwell (PPPU)

**Decant:**
Debra Penny (EL), Phil Andrews (PPPU)

**Facilities Management**
Terry Dickens (EACT)
6.3 Supervising and Monitoring the Delivery of ICT

_Drafting Note: The Academy Trust should set out the arrangements it has put in place for supervising and monitoring the delivery of ICT, confirming the approved budget._

EACT is working alongside RM and the Academy during the current scoping phase to identify and scope requirements.

Once completed, EACT will sign off the technical specification, plans and verify purchase orders.

During implementation, EACT will attend project review meetings, to monitor progress. EACT is also providing representation on DUG and Design groups.

EACT will ensure that there are appropriate sign-off, reporting, exception handling, escalation and change management procedures which are agreed prior to implementation.

Chris Meaney (EACT ICT Director) will be responsible for supervising and monitoring the delivery of ICT.

6.4 Statutory Approvals

An Outline Planning Application for Leeds West was approved on 15 June 2009.

A Reserved Planning Application was submitted on the 18th December 2009 and a decision is due on the 18th February 2010.

The Project Team has worked closely with Planning Officers to ensure that the proposed design is aligned with Leeds City Council’s best practice guidelines for buildings of this type.

The City Council has agreed to take planning judicial review risk as it has on previous school projects and accepts that will be liable for any financial risks that may arise as a result of this risk materializing. The judicial review period is expected to be until 18th May 2010.

_Drafting Note:_ Where the Authority has accepted the Planning risk of judicial review this needs to be stated and the date when this will have concluded should be given. The Authority should also confirm that they have taken into account, and accepted any financial risk that may arise as a result of this risk materialising.
6.5 **Risk**

A risk workshop has been held and a risk strategy for the delivery phase has been developed.

The Risk Register details:

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

The City Council’s Risk Management Plan ensures that the management of risk is integral to the planning and management of any successful project. To crystalise, monitor and manage risk, the City Council has and will continue to maintain a detailed Project Risk Register through the post-construction phase.

6.6 **Summary**

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

All statutory necessary statutory approvals have been granted.

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

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

- Budget for delivery
- Planning Permission
- Risk Register (detailing top 10 risks going forward)
APPENDIX 1 – OVERVIEW AND COMMITMENT

- Benefits realisation plan
- Roles and Responsibilities Matrices
- Accommodation Schedule
- A letter of support from EACT
- A letter of support from the Leeds City Council (To be issued once approved by Executive Board)
- Papers and minutes of Leeds City Council’s Cabinet meetings confirming approval for the project (To be issued once approved by Executive Board)
APPENDIX 2 – THE LOCAL COMPETITION

- A detailed programme of work going forward (Gantt chart, including ICT development and procurement)
- Report on Carbon Reduction for Leeds West Academy
- The Carbon Calculator
APPENDIX 3 – FACILITIES MANAGEMENT

- NOT USED
APPENDIX 4 – ICT PROCUREMENT

- ICT Risk Matrix (identifying the top 10 risks)
- Letter from BECTA confirming that delivery approach for ICT provision has been reviewed and is acceptable
APPENDIX 5 – AFFORDABILITY

- Financial and *Technical Proformas$^3$
- FBC Required KPI Data

*Technical proforma to be submitted as part of NPP2

$^3$ The FBC should include the proformas submitted with the Selected Panel Member’s ITT, updated if there have been any changes.
FBC Required KPI Data

In order to measure efficiencies and achievements against BSF National Priorities the following data is required at FBC stage.

Please record both the data values and the relevant document reference.

<table>
<thead>
<tr>
<th>Data description</th>
<th>Units required</th>
<th>Category</th>
<th>FBC value</th>
<th>Document reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost / m²: Total cost per square metre, calculated as the actual final total cost for new construction divided by the gross floor area.</td>
<td>Average £/m² for sampled schemes</td>
<td>Mainstream New Build</td>
<td>£1080</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>SEN New Build</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Whole life costs</td>
<td>Total NPV whole life cost across all sample schemes, £</td>
<td>New Build</td>
<td>To Follow</td>
<td></td>
</tr>
<tr>
<td>Discount rate: 3.5%</td>
<td></td>
<td>Refurbishment / Remodelling</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Base date: 1Q 2003</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Site works costs*</td>
<td>Total site works cost across all sample schemes, £</td>
<td>All sample schemes</td>
<td>£2,455,232</td>
<td></td>
</tr>
<tr>
<td>Base date: 1Q 2003</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Abnormal costs*</td>
<td>Total abnormal Costs for all sample schemes, £</td>
<td>New Build</td>
<td>£400,00</td>
<td></td>
</tr>
<tr>
<td>Base date: 1Q 2003</td>
<td></td>
<td>Refurbishment / Remodelling</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Number of joined up funding streams predicted for this project in addition to BSF</td>
<td>Number</td>
<td>Project</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>Predicted total amount of joined</td>
<td>£</td>
<td>Project</td>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>

* These should only be completed where Proforma 3 of the Financial and Technical Proformas, provided by Partnerships for Schools at [www.partnershipsforschools.org.uk](http://www.partnershipsforschools.org.uk), does not already hold these costs.
Please also list on the next page any significant assumptions underlying the above data. If there have been any significant change in circumstances affecting these costs i.e. change in building regulations, DCSF policy etc. please state these as well.

| Assumptions / Change in Circumstances |  |  |
APPENDIX 6 – DESIGN AND BUILD CONTRACT AND DEVELOPMENT AGREEMENT

• Schedule of agreed derogations to the Design and Build Contract

• Schedule of agreed derogations to the Development Agreement (To follow)
APPENDIX 7 - READINESS TO DELIVER

- Budget for procurement and delivery
- Planning Permission (Outline Planning Application permission)