

**STRATEGIC OUTLINE CASE**

**YSGOL Y GRAIG PRIMARY**

**EXECUTIVE SUMMARY**

This project will provide a new English medium community primary school for Ysgol y Graig Primary on a new site and accommodating pupils aged 3-11 years. This will include the closure of the nursery site (the former Trefechan nursery school) which is some distance from the primary school. Ysgol y Graig Primary is in poor condition (category D) and parts of the school have had to be taken out of use due to damp and water ingress. In the last year subsidence has affected the main school building and a small extension has moved away from the main structure and had to be closed; lead guttering has also fallen around the school and remedial health and safety measures put in place. In addition, the site has poor access, is land locked, and there is a lack of appropriate external play facilities.

This new build will improve collaboration across the Foundation Phase; remove health and safety concerns around the building and site; provide an accessible site for pupils and visitors with mobility problems; improve the condition of the school to category A; and ensure a more energy efficient building.

The new school will provide improved accommodation for staff and pupils in a one form entry primary school with special unit. The school is a one form entry English-medium primary school. Pupils numbers remain fairly constant in this area. The school currently has surplus capacity of 9.36%

It has been an aspiration of the authority to build a new primary school in this area of the County Borough Council for some time. The area has only a few sites suitable and large enough for a primary school to be built and in order to expedite a new school build as soon as funding becomes available, members have already approved the site where the new school would be built. Council has agreed that the new school be built on the site of the former Vaynor and Penderyn High School (closed in 2004). The secondary school site has been demolished to enable the development of the school to progress more quickly once the 21st Century Schools funding becoming available. School playing fields are nearby (the school playing fields of the former Vaynor and Pendeyrn High School).

As this is a new site, already owned by the authority, work can progress relatively easily. The one-form entry school will be built in line with the authority’s agreed specification for new primary schools to maximise the opportunities for school improvement ie by providing fit for purpose accommodation to include ICT suites; a cooking kitchen; community facilities; and sustainable building solutions.

The cost of the project is estimated at £7m. However, more in depth analyses will be carried out at Outline Business Case stage.

1. **STRATEGIC BUSINESS CASE**

**1.1 The strategic context**

Merthyr Tydfil County Borough Council's strategy for change is to ensure:

* an effective educational infrastructure to support school improvement outcomes;
* efficient provision and supply of school places and management of pupil admissions in order that financial resources are spent to best effect; and
* a sustainable education provision to ensure all schools are fit for teaching and learning in the 21st Century with energy efficient and sustainable schools for the future.

**1.2 The case for change**

The authority’s main drivers for change are:

* school improvement; the urgent need to turn around poor performance and pupil outcomes. In the primary sector Foundation Phase outcomes are a driver for change across the authority;
* the growth in surplus places particularly in secondary schools;
* the need to improve the condition and suitability of school buildings. Ysgol y Graig is the poorest condition primary school in the authority; and
* the opportunity to impact upon deprivation by providing better facilities for teaching and learning; enhancing community facilities and links and providing accommodation for support and multi agency services.

The authority’s vision for change encompasses all schools; as a compact County Borough Council schools and the local authority work closely together for the benefit of learners and there is a shared vision to accelerate educational standards and outcomes whilst establishing sustainable schools in buildings fit for the 21st Century.

**1.3 Investment objectives**

The investment objectives for this project seek to deliver the authority’s priorities for ‘learning for life’ in raising educational standards and improving the quality of the school building and site, as follows:

|  |  |
| --- | --- |
| Investment Objective 1 **Improve Foundation Phase outcomes through closer collaboration.** | |
| **Measures** | **Targets** |
|  The percentage of pupils achieving  the Foundation Phase Outcome  Indicator |  95% of pupils achieve the Foundation Phase Outcome Indicator |
|  The percentage of pupils achieving the KS2 CSI |  100% of pupils achieve the Key stage 2 Core  Subject Indicator |

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| --- | --- |
| Investment Objective 2 **Enhance the quality of the site and buildings to enhance the teaching and learning experiences at the school**. | |
| **Measures** | **Targets** |
|  Learning environment fully fit for purpose |  Health and safety site and building risks  removed |
|  |  Running costs reduced by 20% |

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| --- | --- |
| Investment Objective 3  **Improve the links with the community in order to improve the standards and wellbeing of pupils and reduce the impact of poverty on educational attainment.** | |
| **Measures** | **Targets** |
|  Partnership activities widen the range of choices for pupils |  Enrichment opportunities are varied and there is a high take-up by pupils |
|  Joined-up programmes as a result of links with the community, liaison and communication with parents or carers and other agencies improve pupils’ outcomes and wellbeing |  90% of pupils eligible for Free School Meals achieve the KS2 CSI   * Pupils’ attendance is over 96% * All pupils are punctual |

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| --- | --- |
| Investment Objective 4 **Financial viability – to provide a cost effective and**  **efficient model budget management to ensure long term viability** | |
| **Measures** | **Targets** |
| * Improved financial health ensuring financial viability of school | * Medium term financial planning ensures positive balance transfers at year end. |
|  |  Longer term financial planning continues to  assure the viability of the school. |

**1.4 Main risks**

The main business and service risks associated with the potential scope for this project are shown below, together with mitigation, where available.

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| --- |
| **Business** (the authority cannot progress the scheme)  *Unlikely, it has been a priority of the authority for a number of years to replace the current unsuitable, outdated accommodation at Ysgol y Graig Primary with a new school.* |
| **Design** (the design cannot deliver the services required)  *Unlikely, the new school will be designed following further stakeholder involvement and will build upon authority’s existing experience in collaborative and flexible design to enable long term certainty for service delivery.* |
| **Planning** (that planning cannot be obtained or if obtained cannot be implemented without delay)  *The proposed site of the new school was formerly a secondary school site and the former school has been demolished and the site cleared in readiness for this project.* |
| **Building works** (that works will not be completed on time, to budget or to specification)  ***Potential High Risk*** *to project but managed through detailed planning for the different phases of the project; pre-tender workshops with contractors within the framework; and the project management by experienced officers with successful track record of delivering on time and within budget.* |
| **Demand risk** (theneed for this refurbishment or the size is incorrect)  *The authority has a good record of effective planning for school places; and for planning strategically to enable school building improvement to improve educational opportunities and to remove significant surplus places.* |
| **Funding Risk** (funding issues delay project)  ***Potential High Risk*** *to authority as this scheme is dependent upon external funding streams. The authority is investing capital receipts and prudential borrowing (from revenue savings).* |

**1.5 Constraints**

The main constraint is managing expectations within the project budget of £7m as this is a difficult site for access and groundworks.

**1.6 Dependencies**

There is no statutory consultation involved with this project so the major dependencies are in respect of the usual construction processes that will be carefully monitored and managed throughout the life of the project.

**2. ECONOMIC CASE**

Ysgol y Graig Primary is the poorest condition primary school within the authority’s estate portfolio (category D) and parts of the school have had to be taken out of use due to damp and water ingress. As outlined above there are on-going health and safety issues on the current site. It is estimated that without major investment the site and building would become too dangerous to use as a school within a 5 year period.

The new school will provide improved accommodation for staff and pupils in a one form entry primary school with special unit. The accommodation will comprise of 7 classes, plus nursery, a special unit, plus resource and support facilities Pupils numbers remain fairly constant in this area (around 155-160) the capacity of the school will be 210 pupils with nursery for 30 pupils and special unit of 15 pupils.

The review of the condition of Ysgol y Graig Primary School site and building in 2015 revealed that structural repairs are required to the building as well as new roofs; heating system; windows and external play areas made safe. The backlog in maintenance is estimated at £1.2m.

From a school improvement perspective the recent school Estyn inspection (March 2015) indicated that the school’s current performance and prospects for improvement were both classed as ‘good’.

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| --- | --- | --- | --- |
| Ysgol y Graig Primary School | 2011/12 | 2012/13 | 2013/14 |
| Foundation Phase Indicator | 91.4% | 95% | 86.4% |
| *Quartile* | *1* | *1* | *2* |
| Key Stage 2  Core subject indicator | 71.9 | 78.9 | 86.7 |
| *Quartile* | *4* | *3* | *2* |

Local research, however, indicates that within the County Borough better outcomes can be achieved where nursery classes are on the same site as the primary school:

Percentage of pupils achieving foundation phase outcome indicator

|  |  |  |
| --- | --- | --- |
| Year | Onsite | Off site |
| 2014/15 | 87.3% | 81.0% |
| 2013/14 | 84.6% | 66.1% |
| 2012/13 | 80.4% | 66.1% |

2.1 Critical Success Factors

1. The project is strategically aligned It is a long term ambition of the authority to create a new school incorporating the nursery and with community facilities. This strategy is supported by Members, the school, governors and community. The proposed site for a prospective new school has been agreed.
2. The project should offer value for money. The current site is not fit for purpose for a ‘do-nothing’ option or for refurbishment. A new build is the only way to create a school fit for teaching and learning and to bring the primary school on to one site.
3. The project must be deliverable. The authority’s in-house team has an excellent record of delivering new schools on time and within budget. The same team achieved a ‘green’ rating in the Gateway review for the authority’s other Band A, 21st Century Schools project – Refubishment of Afon Taf High School.
4. The project should be affordable. The feasibility study for this priority project examined the opportunities for further enhancement of the Foundation Phase outcomes by bringing the nursery on to the same site as the main primary school.

2.2 Options appraisal

In order to improve the site and building for Ysgol y Graig Primary school and to bring the nursery on to the same site the different options that could bring about this scheme have been considered through the feasibility study for this project and in meetings with Headteacher, governors, Members and the project team. Each of the options has been evaluated against the Investment Objectives and Critical Success Factors for the project with a view to identifying and appraising the widest possible number of feasible options. The options considered are:

a) Status Quo – maintain current sites and buildings;

b) Refurbishment and new build - an extension to incorporate the nursery class;

c) New build on a more accessible site – new primary school would bring both sites of the primary school together in fit for purpose accommodation.

Each of the elements of the options appraisal (scope, service solution, delivery, implementation and funding) have been considered in detail (see Appendix 1). The findings can be summarised as follows:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Status Quo -**  **Least ambitious** | **Refurbishment - Intermediate** | **New school - More ambitious** |
| Scope | Building would have to close within 5 years | Remove urgent health and safety concerns | Site and building fit for purpose |
| Service solution | School unchanged – health and safety risk | One site | Site and building fit for purpose |
| Service delivery | School unchanged – health and safety risk | Building still not able to meet all service needs | Site and building fit for purpose |
| Implementation | Immediate delivery | delivery by March 2018 | delivery by December 2018 |
| Funding | short term funding solution | Interim solution – greater investment still needed | Best value for investment |

Due to the health and safety risks associated with the current site there are limited options available. As a result, all three options: Status Quo; refurbishment and extension; and new build will continue to be assessed in future business plans for benchmark comparison and to ensure best value.

**Overall findings: the preferred option**

The new school build is the preferred way forward. It offers better value for money and willl deliver the main project objectives to the school and community. The authority has already agreed the capital investment that would be necessary to deliver the capital projects within Band A of the 21st Century Schools Programme. The feasibility study for this new school recommended an indicative budget of £7m and a recent request for change for the overall Band A projects has been approved by Welsh Government which has increased the budget for the project to £7m. During the Outline and Business Cases the authority will continue to explore opportunities for value engineering to obtain best value.

A new school build is supported by Members; the school, governors and wider community. The site of the build has also been agreed by Members. The most recent meeting with the design team, school and governors took place in early July 2015.

**3. COMMERCIAL CASE**

A new Ysgol y Graig Primary school would be developed through the South East Wales Schools Capital Working Group (SEWSCAP) framework.

The authority’s approach to the development of the project has been to procure external design services, working in collaboration with Blaenau Gwent County Council’s architectural services. The design and construction phases are under the management of key officers within the Merthyr Tydfil County Borough Council. All education services will continue to be delivered by the authority along with the majority of the facilities management. This approach has already proved successful in taking forward the refurbishment of Afon Taf High School.

The contract will include community benefits which will enable three apprenticeships to be created; the use of local suppliers and third party contractors and work experience opportunities for local pupils. These will be core to the contract.

**4. FINANCIAL CASE**

The overall funding for Band A to achieve both projects is as follows:

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| --- | --- | --- | --- | --- | --- | --- | --- |
| Project | 2013/14  £’000 | 2014/15  £’000 | 2015/16  £’000 | 2016/17  £’000 | 2017/18  £’000 | 2018/19  £’000 | Total  £’000 |
| Afon Taf High School   * Refurbishment | 35 | 2,465 | 3,500 | 3,500 | 2,500 | 0 | 12,000 |
| Ysgol y Graig Primary   * New school | 0 | 0 | 0 | 200 | 3,000 | 3,800 | 7,000 |
|  | **35** | **2,465** | **3,500** | **3,700** | **5,500** | **3,800** | **19,000** |
| Financing Profile |  |  |  |  |  |  |  |
| Funding | 2013/14  £’000 | 2014/15  £’000 | 2015/16  £’000 | 2016/17  £’000 | 2017/18  £’000 | 2018/19  £’000 | Total  £’000 |
| Welsh Government | 0 | 2,375 | 2,000 | 2,000 | 3,125 | 0 | 9,500 |
| Merthyr Tydfil CBC  General Capital Funding/  Capital Receipts/ Unsupported Borrowing | 35 | 90 | 1,500 | 1,700 | 2,375 | 3,800 | 9,500 |
|  | **35** | **2,465** | **3,500** | **3,700** | **5,500** | **3,800** | **19,000** |

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A feasibility study regarding a new school build for Ysgol y Graig Primary indicated the optimum site in the area for the build and an indicative budget of £7m; this budget has not changed during Band A. However, the feasibility study for the refurbishment of Afon Taf High School concluded that the condition of that school was such that major infrastructure works would be necessary and that the budget for the Afon Taf High School scheme would need to be increased to £12m. As a result the authority had to revise the overall Band A programme in order to afford the two priority projects: Refurbishment of Afon Taf High School (currently taking place); and a new primary school for Ysgol y Graig Primary School. This has meant delaying the refurbishment of Pen y Dre High School until Band B. The changes to the Band A projects and the £2m increase in the overall budget were approved by Members in 2013. The two Band A projects tackle the worst condition secondary and primary schools within the authority.

**5. MANAGEMENT CASE**

The authority has used robust project management methodology to guide projects through a controlled well-managed and visible set of activities in order to achieve the desired results and benefits. The authority has used processes based upon PRINCE 2 principles as a way of ensuring that a project’s objectives are successfully delivered. Using the general principles and methodologies of PRINCE 2 the Project Board will manage the activities and outputs of the project and meet the WAG requirements and any specific guidance issued during the project’s lifespan.

A Gateway Review will be scheduled at Full Business Case. The key milestones have been agreed and are highlighted below:

|  |  |
| --- | --- |
| Approval of Project SOC by Welsh Government | December 2015 |
| Submission of Project OBC | March 2016 |
| Approval of Project OBC | May 2016 |
| RIBA Stage C achieved | May 2016 |
| Gateway Review | July 2016 |
| Submission of Project FBC | July 2016 |
| Approval of FBC | October 2016 |
| Appointment of Contractor | November 2016 |
| Planning permission | November 2016 |
| Commencement of project | April 2017 |
| Completion of phase one | March 2018 |
| Commencement of phase two | April 2018 |
| Completion of phase two | November 2018 |
| Project handover | December 2018 |
| Opening of new school | January 2019 |

**Signed…………………………………………………………………………………**

**Printed…………………………………………………………………………………**

**Position in the organisation………………………………………………………**

**Date…………………………………………………………………………………….**

**YSGOL Y GRAIG OPTIONS APPRAISAL**

**STRATEGIC OUTLINE CASE**

**1. Options**

The list of options have arisen from the feasibility study in relation to this project and meetings with Headteacher, governors, Members and the project team. Each of the options has been evaluated against the Investment Objectives and Critical Success Factors for the project with a view to identifying the widest possible number of feasible options.

* 1. Investment objectives

The investment objectives for the project are:

|  |
| --- |
| Investment Objective 1 **Improve Foundation Phase outcomes through closer**  **collaboration.** |
| Investment Objective 2 **Enhance the quality of the site and buildings to enhance the**  **teaching and learning experiences at the school**. |
| Investment Objective 3  **Improve the links with the community in order to improve the**  **standards and wellbeing of pupils and reduce the impact of**  **poverty on educational attainment.** |
| Investment Objective 4 **Financial viability – to provide a cost effective and efficient**  **model budget management to ensure long term viability.** |

* 1. Critical success factors

The critical success factors for the project are:

1. The project is strategically aligned It is a long term ambition of the authority to create a new school incorporating the nursery and with community facilities. This strategy is supported by Members, the school, governors and community. The proposed site for a prospective new school has been agreed.
2. The project should offer value for money. The current site is not fit for purpose for a ‘do-nothing’ option or for refurbishment. A new build is the only way to create a school fit for teaching and learning and to bring the primary school on to one site.
3. The project must be deliverable. The authority’s in-house team has an excellent record of delivering new schools on time and within budget. The same team achieved a ‘green’ rating in the Gateway review for the authority’s other Band A, 21st Century Schools project – Refubishment of Afon Taf High School.
4. The project should be affordable. The feasibility study for this priority project examined the opportunities for further enhancement of the Foundation Phase outcomes by bringing the nursery on to the same site as the main primary school.
5. **Scope**

This section examines the main options in relation to the service scope of the proposal which are as follows:

a) Status Quo – maintain current sites and buildings;

b) Refurbishment and new build - an extension to incorporate the nursery class;

c) New build on a more accessible site – new primary school would bring both sites of the primary school together in fit for purpose accommodation.

2.1 Analysis of advantages and disadvantages

1. Status Quo

* Significant health and safety issues mean that the building would have to be closed within a 5 year period if nothing is done. Cast iron guttering recently fell from height into the playground during playtime, fortunately no-one injured but many classroom exits and reception soft-play area taken out of use until urgent repairs carried out.
* The general condition of the school continues to deteriorate.
* Although this option removes capital investment it would put staff and pupils at risk to fail to address the building and site concerns. This option remains as a benchmark although none of the stakeholders feel that it could be a solution to the current needs.

1. Refurbishment and new build

* There are considerable health and safety issues at the current site which need major works – subsidence, damp and water ingress making some areas of the school unusable;
* The current building and site is in poor condition and even with significant investment could not deliver on the investment objectives;
* The current site is landlocked which would make any building project more difficult and costly;
* Major works are required to the infrastructure; ground stabilisation; heating; electrics; etc. before improvement works could progress;
* The whole school requires refurbishment and there are no spare areas for decanting pupils whilst building work takes place. There is also no space to locate and fit mobile classrooms on site to enable refurbishment works to take place.
* The current school is on several different levels due to the sloping nature of the site, These site issues make the school difficult to refurbish to the required standard for pupil accessibility; and
* The condition and site are poor; the class sizes are small and below recommended size for primary and nursery schools.

1. Build a replacement new primary school incorporating the nursery

* This would bring both of the primary school sites together on one fit for purpose campus in a BREEAM excellent school which maximises the opportunities for natural light, ventilation and energy efficiency.
* This option would require the greatest level of investment but would provide site and accommodation fit for purpose; and remove significant health and safety risks;
* Improve outcomes for Foundation Phase through closer collaboration;
* Improve access to and from site for pedestrians and vehicular travel; and
* Provide facilities in order to maintain and expand links with the community.

2.2 Conclusions

The table below summarises how well the above options meet the investment objectives and the critical success factors agreed for this project.

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Status Quo** | | | | **Intermediate - refurbishment** | | | | **Maximum - New school** | | | |
| **Scope** | Building would have to close within 5 years | | | | Remove health and safety concerns | | | | Site and building fit for purpose | | | |
| **Investment objectives** | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
|  |  |  |  |  |  |  |  |  |  |  |  |
| **Critical Success Factors** | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
|  |  |  |  |  |  |  |  |  |  |  |  |

On the basis of the above analysis the preferred way forward is the Maximum option: a new school build.

**3. Service solution and delivery**

This section examines the main options in relation to service solution and delivery as follows:

1. Status Quo Although this option will enable school to continue to operate in the short term, the governors and local authority would be ignoring health and safety risks. The site and building would have to close within 5 years.
2. Refurbishment and new build Although this would mitigate urgent health and safety concerns it will be difficult to deliver service whilst refurbishment and an extension are built. However, this option would enable more effective service delivery with school operating on one site. An on-going risk of further subsidence would remain which would affect future service delivery.
3. New Build Although this option requires the greatest investment it provides a long term solution for service, curriculum and safety needs.

3.1 Analysis of advantages and disadvantages

1. Status Quo Signicant health and safety risks remain. This option does not deliver the building and site improvements that are much needed. It also curtails the curriculum improvements that would come from having the foundation phase delivered on one site.
2. Refurbishment and new build Delivery of scheme on restricted site would present further health and safety risks. This solution could not fully address subsidence concerns nor improve classroom sizes and accessibility across the site.
3. New Build The build on another site in the village will enable work to be carried out more quickly and without disruption to current service and service delivery.

3.2 Conclusions

The table below summarises how well the above options meet the investment objectives and the critical success factors agreed for this project.

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Status Quo** | | | | **Intermediate - refurbishment** | | | | **Maximum - New school** | | | |
| **Scope** | School unchanged – health and safety risk | | | | School on one site health and safety concerns | | | | Site and building fit for purpose | | | |
| **Investment objectives** | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
|  |  |  |  |  |  |  |  |  |  |  |  |
| **Critical Success Factors** | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
|  |  |  |  |  |  |  |  |  |  |  |  |

On the basis of the above analysis the preferred way forward is the Maximum option: a new school build. This is the option favoured by stakeholders.

**4. Implementation**

This section examines the main options in relation to the implementation of the proposal which are as follows:

1. Status Quo Delivery immediate but significant corporate risk would remain.
2. Refurbishment and new build Scheme could be delivered 9 months earlier than new build (March 2018)
3. New Build New school would open on 1st January, 2019.

4.1 Analysis of advantages and disadvantages

1. Status Quo Signicant health and safety risks remain. This option does not deliver the building and site improvements that are much needed. It also curtails the curriculum improvements that would come from having the foundation phase delivered on one site.
2. Refurbishment and new build Delivery of scheme on restricted site would present further health and safety risks. This solution could not fully address subsidence concerns nor improve classroom sizes and accessibility across the site.
3. New Build Sufficient time to procure effectively and to work with preferred contractor to explore value engineering solutions.

4.2 Conclusions

The table below summarises how well the above options meet the investment objectives and the critical success factors agreed for this project.

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Status Quo** | | | | **Intermediate - refurbishment** | | | | **Maximum - New school** | | | |
| **Scope** | immediate delivery | | | | delivery by March 2018 | | | | delivery by Sept 2018 | | | |
| **Investment objectives** | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
|  |  |  |  |  |  |  |  |  |  |  |  |
| **Critical Success Factors** | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
|  |  |  |  |  |  |  |  |  |  |  |  |

**5. Funding**

This section examines the main options in relation to the funding of the proposal which are as follows:

1. Status Quo Saving of capital investment.
2. Refurbishment and new build Reduced local authority and Welsh Government funding levels.
3. New Build Would require estimated budget of £7m.

5.1 Analysis of advantages and disadvantages

1. Status Quo Signicant health and safety risks remain. This option does not provide best value.
2. Refurbishment and new build This scheme is affordable but does not deliver all of the critical factors and investment outcomes required of the scheme.
3. New Build This requires a greater investment but both the local authority and Welsh Government has planned for this expenditure in order to deliver this priority scheme.

5.2 Conclusions

The table below summarises how well the above options meet the investment objectives and the critical success factors agreed for this project.

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Status Quo** | | | | **Intermediate - refurbishment** | | | | **Maximum - New school** | | | |
| **Scope** | short term funding solution | | | | interim solution | | | | Best value for investment | | | |
| **Investment objectives** | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
|  |  |  |  |  |  |  |  |  |  |  |  |
| **Critical Success Factors** | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 |
|  |  |  |  |  |  |  |  |  |  |  |  |

On the basis of the above analysis the preferred way forward is a new school build. This is achievable and meets all the project objectives including best use of financial resources to ensure a long term sustainable school to meet local and community needs.

**6. Summary of options appraisal**

Each of the elements of the options appraisal (scope, service solution, delivery, implementation and funding) have been considered (Appendix 1) enabling consideration of a short list based upon this preliminary analysis. The findings can be summarised as follows:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Status Quo -**  **Least ambitious** | **Refurbishment - Intermediate** | **New school - More ambitious** |
| Scope | Building would have to close within 5 years | Remove urgent health and safety concerns | Site and building fit for purpose |
| Service solution | School unchanged – health and safety risk | One site | Site and building fit for purpose |
| Service delivery | School unchanged – health and safety risk | Building still not able to meet all service needs | Site and building fit for purpose |
| Implementation | Immediate delivery | delivery by March 2018 | delivery by December 2018 |
| Funding | short term funding solution | Interim solution – greater investment still needed | Best value for investment |

Due to the health and safety risks associated with the current site there are limited options available. As a result, all three options: Status Quo; refurbishment and extension; and new build will continue to be assessed for benchmark comparison and to ensure best value.

6.1 Overall findings: the preferred option

The new school build is the preferred way forward; the solution supported by Members; the school, governors and wider community. The site of the build has also been agreed by Members and indicative budget agreed. During the Outline and Business Cases the authority will continue to explore opportunities for value engineering to obtain best value.