

Outline Business Case:

Sennybridge C.P School

August 2022

Version 0.6





Contents

Figures	6
Tables	6
0. Document Control	8
0.1 Version Control.....	8
1 Executive Summary	9
1.1 Strategic Case	9
1.1.1 Introduction.....	9
1.1.2 Investment Objectives	9
1.2 Economic Case	10
1.2.1 Options	10
1.2.2 Net Present Cost	11
1.3 Commercial Case	12
1.4 Financial Case	13
1.5 Management Case	13
2 Strategic Case	15
2.1 Strategic Fit	15
2.1.1 National Strategies	15
2.1.2 Local Strategies.....	15
2.2 Case for Change	16
2.2.1 Investment Objectives	16
2.2.2 Targets and measures	17
2.2.3 Existing Arrangements	18
2.2.4 Problems with the status quo – Sennybridge	21
2.3 Developments since completion of the SOC	22
2.4 Welsh Medium Education.....	22
2.5 Childcare/Nursery Provision	23
2.6 Active Travel.....	24
2.6.1 Walking accessibility	24
2.6.2 Cycling accessibility:	24



2.7	Community/Sports Facilities	25
2.8	Equalities, Impact Assessments and Children’s Rights Assessments	25
2.9	Net Zero Carbon and the Environment.....	25
2.10	Main Benefits.....	26
2.11	Main Risks	28
2.12	Project Constraints	28
2.13	Project Dependencies	29
3	Economic Case	30
3.1	Critical Success Factors	30
3.2	Long List Options.....	30
3.3	Scope Appraisal	31
3.3.1	Options	31
3.3.2	Advantages and Disadvantages.....	31
3.3.3	Conclusion.....	34
3.4	Service Solution Appraisal.....	35
3.4.1	Options	35
3.4.2	Advantages and Disadvantages.....	35
3.4.3	Conclusion.....	38
3.5	Service Delivery Appraisal.....	39
3.5.1	Options	39
3.5.2	Advantages and Disadvantages.....	39
3.5.3	Conclusion.....	40
3.6	Implementation Appraisal	41
3.6.1	Options	41
3.6.2	Advantages and Disadvantages.....	41
3.6.3	Conclusion.....	42
3.7	Funding Appraisal.....	43
3.7.1	Options	43
3.7.2	Advantages and Disadvantages.....	43
3.7.3	Conclusion.....	44
3.8	Summary of appraisals.....	45

3.9	Economic Appraisal.....	46
3.9.1	Cost Components.....	46
3.9.2	Net Present Cost Project.....	46
3.9.3	Summary of Economic Ranking	47
3.9.4	Monte Carlo Simulation	47
3.10	Qualitative Benefits Appraisal.....	50
3.11	Risk Appraisal.....	51
3.12	Summary of Appraisals	54
4	Commercial Case.....	55
4.1	Procurement Method	55
4.1.1	Procurement Strategy	55
4.1.2	Award methodology.....	57
4.2	Required Services	58
4.2.1	The required service streams:.....	58
4.2.2	The specification of required outputs:	59
4.3	Potential for Risk Transfer.	59
4.4	Project Bank Accounts (PBAs).....	59
4.5	Community Benefits	61
4.5.1	Agreed schedule	61
4.5.2	Delivery of agreed targets	61
5	Financial Case.....	62
5.1	Project Summary Costs.....	62
5.2	Breakdown of Capital Costs	62
5.3	Cost Template	63
5.4	Cost Build Up.....	65
5.5	Impact on the Organisation's income and expenditure account.....	66
5.6	Overall Affordability and Balance Sheet Impact	67
6	Management Case	68
6.1	Programme Management Arrangements	68
6.2	Project Management Arrangements	69
6.2.1	Project Structure.....	70

6.2.2	Outline Project Plan.....	71
6.2.3	Project Deliverables	72
6.2.4	Benefits Realisation.....	73
6.3	Risk Management.....	73
6.4	Change and Contract Management	73
6.5	Gateway Reviews.....	74
6.6	Post Project Evaluation	74
6.6.1	Post Implementation Review (PIR)	74
6.6.2	Project Evaluation Reviews (PERs)	74
6.7	Contingency Plans.....	74

Figures

Figure 1: Sennybridge and Brecon Locations.....	19
Figure 2– Options Distributions.....	48
Figure 3 – Cumulative Distributions	48
Figure 4: PBA money route.....	60
Figure 5: Programme Vision (to be updated once new CIP is published)	68
Figure 6: Transforming Education Programme Governance	69
Figure 7: Project Structure	70
Figure 8: Product breakdown.....	72

Tables

Table 1 – Measures and Targets.....	17
Table 2 – Sennybridge Primary Summary Information	20
Table 3 – Staff Numbers	20
Table 4 – Present & forecast pupil numbers.....	20
Table 5 – Latest condition assessments (2016)	20
Table 6: Current WM Pupils by Year	22
Table 7 – Main Benefits by Investment Objective	26
Table 8 – Strategic Risks and Countermeasures	28
Table 9 – Scope advantages and disadvantages.....	31

Table 10 – Scope appraisal summary	34
Table 11 – Project B: Service solution advantages and disadvantages	35
Table 12 – Service Solution appraisal summary	38
Table 13 – Service delivery advantages and disadvantages	39
Table 14 – Service Delivery appraisal summary	40
Table 15 – Implementation advantages and disadvantages	41
Table 16 – Implementation appraisal summary	42
Table 17 – Funding advantages and disadvantages	43
Table 18 – Funding appraisal summary	44
Table 19 – Long List Summary	45
Table 20 – Cost Components	46
Table 21 – Economic Appraisal	46
Table 22 – Economic Summary	47
Table 23: Summary of Results	49
Table 24: Summary of Overall Results:	50
Table 25: Summary of Overall Results:	50
Table 26 – Benefit Group examples	50
Table 27 – Benefits Appraisal	51
Table 28 – Risk Appraisal	52
Table 29 – Summary of Appraisals	54
Table 30 – Risk category	59
Table 31 – Key metrics	62
Table 32 – Breakdown of capital costs	62
Table 33 – Elemental Breakdown	63
Table 34 – Cost build up (extract)	65
Table 35 – Impact on the organisation’s income and expenditure account (extract)	66
Table 36 - Programme Team	69
Table 37 – Project team	71
Table 38 – Outline project plan	71
Table 39 – Proposed Benefits Realisation Plan Structure	73

0. Document Control

0.1 Version Control

Version	Status	Date	Author	Update
0.1	Draft	08/06/2022	RG	First Draft
0.2	Draft	07/07/2022	LD	Revised draft
0.3	Draft	08/07/2022	ME	Client review and amendments
0.4	Draft	08/07/2022	LD	Completion of all identified changes
0.5	Draft	12/08/2022	LD	Updated economic case
0.6	Draft	22/08/2022	DR	Amendments

1 Executive Summary

1.1 Strategic Case

1.1.1 Introduction

The purpose of this Outline Business Case (OBC) is to present the case for investment in the Brecon catchment, a new 150 dual stream primary school in Sennybridge.

The cost of the preferred option **including optimism bias and early-stage risk** is estimated to be **£11,154,570**:

Project Costs	
Capital Cost	£9,074,723
Optimism Bias	£1,353,640
Risk	£725,978
VAT (only to be included where non-recoverable by applicant)	N/A
Total Project Cost at OBC stage (inclusive of optimism bias and risk)	£11,154,341

The project will be funded jointly by Welsh Government and Powys County Council (PCC) as outlined below – these figures don't include optimism bias and risk as it is assumed that optimism bias and risk will be fully mitigated and that the capital build cost is the actual cost upon which the intervention rate will apply.

Funding allocations	
Welsh Government contribution (65%)	£5,898,570
PCC (35%)	£3,176,153
Total capital cost	£9,074,723

The **case for change** is based on the following significant issues:

1. The condition of the buildings at Sennybridge is poor;
2. Building accessibility at the school is also poor;

On 14 April 2020 Council approved the new Strategy for Transforming Education in Powys 2020-30, replacing the legacy School Organisation Policy 2018. The new Strategy sought to address a number of significant concerns raised by Estyn on the progress of the Council's school reorganisation programme, acknowledging a historical lack of political decision making and a deep scepticism amongst the teaching profession regarding the Council's political commitment to schools and to the delivery of the improvements that are needed.

In directly addressing these issues the new strategy outlines:

- a summary of the challenges faced by the education sector in Powys;
- a new vision for education in Powys;
- a final set of guiding principles;
- strategic aims and objectives;
- a programme of activity;
- a summary of the legislative process;

New governance arrangements have also been introduced to support the delivery of the new strategy.

The strategy is supported by a new Strategic Outline Programme (SOP) for capital funding for school building projects to be phased over a ten year period. The capital funding required to enable the strategy to be delivered has been estimated at £350m.

1.1.2 Investment Objectives

The Investment Objectives underlying the case for change for this project are:

1. Provide a stimulating teaching and learning environment in state of the art, 21st Century facilities that will impact positively on the self-esteem and well-being of all pupils and deliver the new curriculum for Wales.
2. Remove non DDA compliant poor condition buildings, reduce backlog maintenance and provide environmentally sustainable schools incorporating zero net carbon principles which improve the building's efficiency and running costs.
3. Develop Community-focused schools that are the central point for multi-agency services to support children, young people, families and the community.
4. Provide Early Years facilities that meet the needs of all children and enable the effective delivery of the Curriculum for Wales
5. To meet and stimulate demand for Welsh-medium provision
6. To provide an optimal safeguarding environment.
7. Ensure that all pupils with SEN/ALN are placed in a provision that meets their needs, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential.

1.2 Economic Case

1.2.1 Options

Following an initial assessment of the of the scope of work required, a long list of options was developed for each project within the remit of the scope:

- Option 1 - Do nothing - Close the existing school and relocate pupils to nearest schools.
- Option 2 - Business as usual (BAU).
- Option 3 - Remodel the existing building and outside area.
- Option 4 - Build extension to the existing school.
- Option 5 - New Build school on existing site.
- Option 6 - New build School on alternative site.

Each of these options (for each project) were subjected to a review of advantages and disadvantages and an appraisal against the Investment Objectives and Critical Success Factors agreed by the Powys officers team.

During the appraisal, it was clear that Option 1 (Do Nothing) did not sufficiently meet the Investment Objectives or Critical Success Factors, but was carried forward as a baseline comparator, in line with the guidance in the HM Treasury Green Book.

As a result of this, the following options from each project were short-listed for Economic and Financial appraisal:

- Option 2: Do Nothing – Business as Usual.
- Option 5: New build 150 place 4-11 dual stream community Primary School in Sennybridge on existing site.
- Option 6: New build 150 place 4-11 dual stream community Primary School in Sennybridge on alternative site.

The short-listed options were assessed over a 60 year period (20 years in the case of Option 1, Do Nothing), to understand the Net Present Cost (NPC) and Equivalent Annual Cost (EAC) of each option.

As the assessment periods were not uniform, the Equivalent Annual Cost is deemed the main point of comparison between the options. The Economic Appraisal resulted in the following outcomes.

1.2.2 Net Present Cost

Discounted Cash flow (DCF) Summary Sheet		Inc. Optimism Bias		Excl. Optimism Bias	
Option No.	Option Name/Description	NPC (£m)	EAC (£m)	NPC (£m)	EAC (£m)

Option 2:	Do nothing – business as usual – (BAU)	10.0	0.68	10.0	0.68
Option 5:	New build 5 classroom school on the existing playground area of Sennybridge CP School to include Early Years facility and community room.	27.2	1.04	25.0	0.95
Option 6:	New build 5 classroom school on an alternative site within the area to include Early Years facility and community room.	27.8	1.06	25.4	0.97

DCF = Discounted Cash Flow

NPC = Net Present Cost

EAC = Equivalent Annual Cost

The options were economically appraised over different time periods, with Option 1 being appraised over 20 years, while Options 5 and 6 were appraised over 60 years. Once again, this is because Option 1 is essentially a 'Do Minimum' option where the lifespan of the asset is significantly less than the other options considered.

On that basis, the key comparator from the Economic Appraisal table is the Equivalent Annual Cost (EAC), which calculates the average annual (economic) cost to the Council. On that basis, Option 1 appears to be the best option economically, but was actually only carried forward as point of comparison and did not meet a critical mass of the Council's Investment Objectives and Critical Success Factors.

1.3 Commercial Case

The Council has good experience of working with contractor frameworks and has achieved positive outcomes using such frameworks. The Council has therefore concluded that the optimum procurement route will be to use the revised SEWSCAP framework that was re-launched in June 2019 (SEWSCAP 3). The benefits of utilising contractors from this existing Contractor Frameworks list are as follows:

1. Consultation and design development can be carried out inhouse by Powys Property Design Services. The design team will then remain actively involved throughout the duration of the project, fulfilling the intelligent client role once the project is passed over to the successful contractor, thus ensuring continuity of professional staff representing PCC during all stages of the project programme.
2. Compliant with EU procurement directives and the Public Contract Regulations (2014), offering a swift route to market and opportunities for early contractor involvement;
3. The framework is free to use, offering a variety of contracts, pricing models and the potential for further savings achieved via mini-competition;
4. The new SEWSCAP Property Construction Framework is divided into the following lots:

- Lot 1: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Powys County Council and other Potential Employers based or operating in Powys or operating nearby;
- Lot 2: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Torfaen County Borough Council, Blaenau Gwent County Borough Council, Monmouthshire County Council, Caerphilly County Borough Council or other Potential Employers based or operating near those areas;
- Lot 3: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Rhondda Cynon Taf County Borough Council, Merthyr Tydfil County Borough Council and Bridgend County Borough Council and any Participating Authorities based or operating near those areas
- Lot 4: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Vale of Glamorgan Council, The County Council of the City of Cardiff Council, Newport City Council or other Potential Employers based or operating near those areas;
- Lot 5: Provision of Construction services, extensions and refurbishment under traditional or design and build with all associated works – (£1,500,001 to £3,000,000) - Powys County Council and other Potential Employers based or operating in Powys or operating nearby to include new build
- Lot 6: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£1,500,001 to £3,000,000) - All Potential Employers
- Lot 7: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£3,000,001 to £5,000,000) - All Potential Employers
- Lot 8: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£5,000,001 to £10,000,000) - All Potential Employers
- Lot 9: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£10,000,001 to £25,000,000) - All Potential Employers
- Lot 10: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£25,000,001 to £100,000,000) – All Potential Employers

In this instance the Council proposes to use Lot 8 (£5M - £10M)

1.4 Financial Case

A balance sheet asset addition of £9,074,723 is made for the new build school. Short term additional funding is required of the full amount for years 0 through 3 (inclusive), excluding VAT, retained risks and optimism bias.

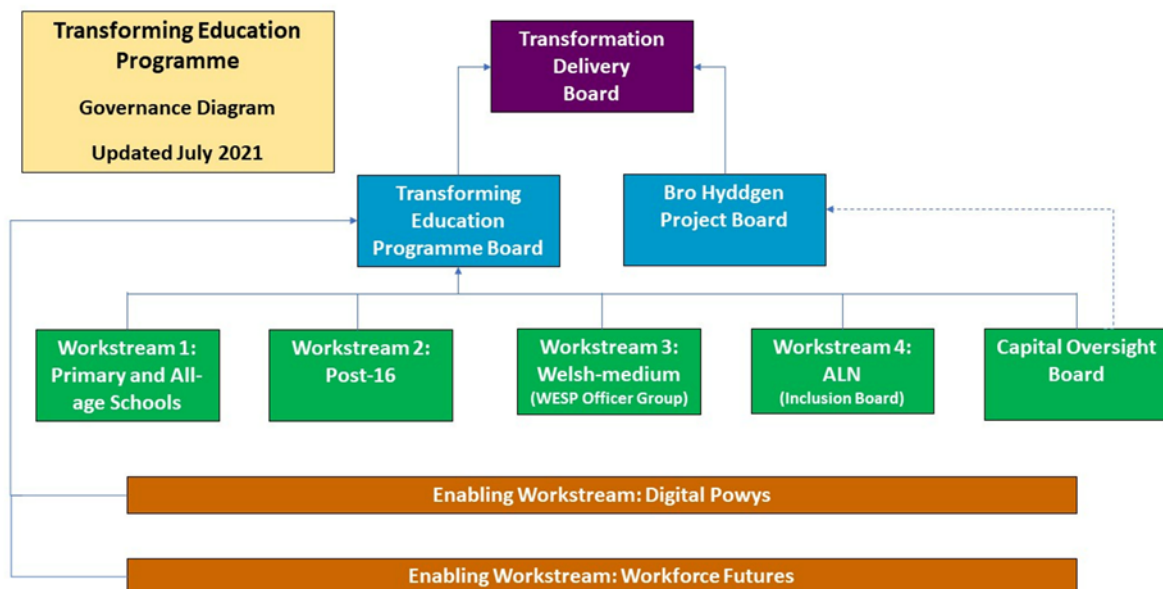
From the opening of the new school building in 2025 there will be a small increase in the recurring revenue cost of school, at approximately 13K per annum.

The Band B submission has been scrutinised and assessed by the Council’s Section 151 Officer for affordability in light of the 65% programme intervention rate. The Council will meet the 35% contribution required to support the project through prudential borrowing.

1.5 Management Case

This scheme is a constituent of Powys County Council’s Transforming Education Programme, and has been identified within that Programme as a priority. It will be managed in accordance with best practice in programme and project management principles – MSP and PRINCE2 to provide a systematic and effective delivery framework.

Overall corporate governance for the Transforming Education Programme (formerly known as the 21st Century Schools Transformation Programme) is in accordance with the governance arrangements for the Council’s Transformation Programmes, as outlined in the following diagram:



Outline Project Plan

Date	Actions (commencement)
09/10 2022	OBC approvals
10/2023	Commence Procurement for a Design & Build contractor
11/2023	Planning Application
01/2024	Planning Approval Contract Award
02/2024	RIBA 4 Completed
02/03 2024	FBC approvals
05/2024	Commence Construction
09/2025	New school building opens

2 Strategic Case

2.1 Strategic Fit

2.1.1 National Strategies

The proposals contained within this business case contribute to the following national and international strategies and policies:

- The Curriculum and Assessment (Wales) Act 2021.
- Additional Learning Needs (ALN) Code for Wales December 2018 and the Additional Learning Needs and Educational Tribunal (Wales) Act 2018.
- Wellbeing and Future Generations Act 2015.
- Sustainable Communities for Learning Programme.
- Skills framework for 3-19-year-olds in Wales 2008.
- One Wales: One planet, a new sustainable development scheme for Wales May 2009. Or any successor strategy.
- Net Zero Delivery Plan.
- Measuring the capacity of schools in Wales – Circular 021/2011.
- Welsh Medium Education Strategy 2010.
- A Living Language: A language for Living: Welsh Language Strategy 2012-17.
- Building a Brighter Future: Early Years and Childcare Plan 2013.

2.1.2 Local Strategies

- Strategy for Transforming Education in Powys, which sets out Powys' approach to developing school infrastructure and the planning of school places.
- Welsh in Education Strategic Plan 2022-32 sets out the council's priorities for developing Welsh-medium provision within Powys.
- A Strategy For Climate Change-net positive Powys 2021-2030 Net Zero Schools, which identifies that all new schools will be part of a new generation of energy efficient buildings.
- Powys Regeneration Strategy aims to deliver outcomes which will have a positive impact upon the physical, social, environmental, economic, and cultural attributes of the county; and
- Powys ICT Strategy which aims at delivering learners' entitlement to use technology to support their learning and to enable schools to become more innovative and effective in their teaching and learning

2.2 Case for Change

2.2.1 Investment Objectives

The Investment Objectives underlying the case for change for this project are:

1. Provide a stimulating teaching and learning environment in state of the art, 21st Century facilities that will impact positively on the self-esteem and well-being of all pupils and deliver the new curriculum for Wales.
2. Remove non DDA compliant poor condition buildings, reduce backlog maintenance and provide environmentally sustainable schools incorporating zero net carbon principles which improve the building's efficiency and running costs.
3. Develop Community-focused schools that are the central point for multi-agency services to support children, young people, families, and the community.
4. Provide Early Years facilities that meet the needs of all children and enable the effective delivery of the Curriculum for Wales
5. To meet and stimulate demand for Welsh-medium provision
6. To provide an optimal safeguarding environment.
7. Ensure that all pupils with SEN/ALN are placed in a provision that meets their needs, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential.

2.2.2 Targets and measures

The following table identifies the measures and targets that will be utilised to ensure that the identified investment objectives are SMART.

Table 1 – Measures and Targets

IO	Measure	Target
1.	Improved motivation, engagement, attendance & extracurricular involvement as evidenced by: <ol style="list-style-type: none"> School Self Evaluation School Improvement Plan Estyn inspection Local authority review 	<ul style="list-style-type: none"> All aspects of pupil wellbeing (as detailed in Estyn guidance) to be awarded a judgement of at least Good by September 2026 Local Authority core visits report improved engagement, motivation and pupil wellbeing by September 2026 Attendance percentage rate to increase to 95% for the academic year 2025/2026 To interview 10% of pupils and 5% of parents to evaluate the effectiveness of the school's policies and practices in promoting pupils' wellbeing seeking a 90% satisfaction rate (reference parental survey annexe 5 Estyn guidance)
2.	<ul style="list-style-type: none"> Reduction in backlog maintenance and accessibility costs by £1.023M by September 2025 New schools is DDA compliant upon opening in September 2025. Carbon Net Zero - Carbon calculator Reduction in energy use and carbon emissions 	<ul style="list-style-type: none"> Zero backlog maintenance and accessibility costs. School is DDA compliant. School is Zero net carbon Reduction in combined gas and electricity consumption to 32.8kwh/m2 by September 2025; Reduction in CO2 emission to 25.5kg/m2 by September 2025 Reduction in combined OIL and electricity consumption to 32.8kwh/m2 by September 2025;Reduction in CO2 emission to 25.5kg/m2 by September 2025
3.	<ul style="list-style-type: none"> Amount of community usage of facilities Number of multi-agency services available from the school 	<ul style="list-style-type: none"> Minimum 40 hours per month community usage Minimum of services that assist children, young people and the family available at the school
4.	<ul style="list-style-type: none"> All children will benefit from facilities in the indoors and outdoors that meet the needs of 21st century learners 	<ul style="list-style-type: none"> Awarded a judgement of at least Good by September 2025 Available am and pm for extended child care (eg breakfast club, child care hours)

IO	Measure	Target
	<ul style="list-style-type: none"> Teaching and Learning – ‘improved breadth, balance and appropriateness of the curriculum’ (as detailed in Estyn guidance) 	
5.	<ul style="list-style-type: none"> Number / % of pupils taught through the medium of Welsh at the school 	<ul style="list-style-type: none"> Increase in the number / % of pupils taught through the medium of Welsh at the school
6.	<ul style="list-style-type: none"> Achieved through design from opening of new schools. 	<ul style="list-style-type: none"> Building design meets building bulletin requirements and has appropriately designed safeguarding arrangements
7.	<ul style="list-style-type: none"> Range of specialist teaching and support available to ALN learners Range of specialist facilities available to ALN learners 	<ul style="list-style-type: none"> ALN provision would be incorporated within the class setting small intervention room for withdrawal work and a wellbeing room.

2.2.3 Existing Arrangements

Sennybridge Community Primary School is located in the village of Sennybridge, which is in the community of Maescar which has a population of 965 usual residents. Maescar has a community council with eleven locally elected or co-opted community councillors.

The village of Sennybridge and the site of the existing school itself lie within the boundaries of the Brecon Beacons National Park Authority. The Brecon Beacons National Park covers an area of 1,344 km². The entire national park achieved the status of being designated an international dark sky reserve in February 2013, and is the destination for a large number of tourists throughout the year.

Sennybridge Community Primary School has a strategic location, sitting as an outlier on the Powys border, but within the Brecon catchment area. The school lies 9 miles (14 km) west of Brecon and is close to the border with Neath Port Talbot County Borough Council.

The main school building was built in 1939 and was designated until the 1980s as Defynnog Primary School. The school was originally constructed as a Secondary Modern school, with a wing of accommodation of one side of the hall for boys and the other wing for girls. Each wing had a separate entrance and toilet facilities. To the rear of the school an extension was constructed in the 1970s/80s. This has subsequently been adapted and now contains the Early years setting alongside an upper-level community gymnasium with a restricted height external store beneath. More recently the school constructed a small conservatory to the north of the KS1 accommodation. A separate canteen building was constructed to the south of the main school, this is believed to be contemporary to the main building.

Figure 1: Sennybridge and Brecon Locations

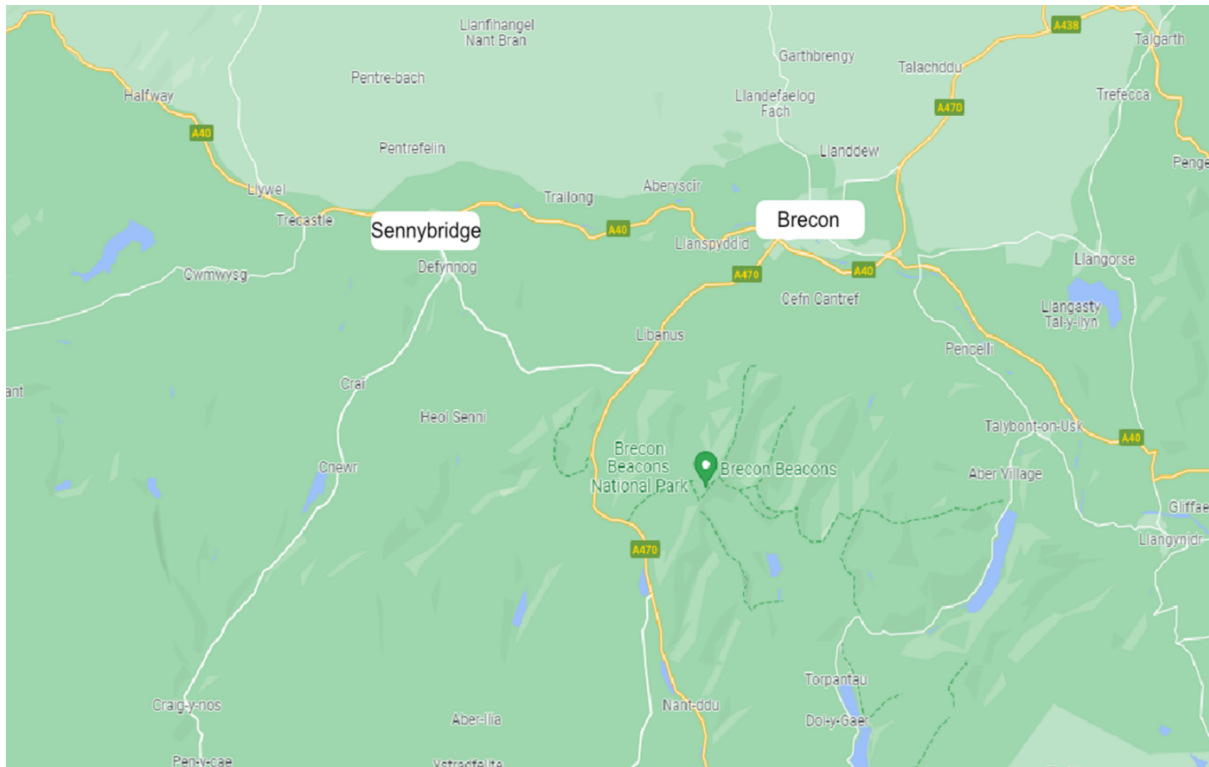


Figure 2: Sennybridge Primary School



Table 2 – Sennybridge Primary Summary Information

Language Category	Dual Stream
Age range	4-11
Total number of places in school	125
Number of pupils	135 (PLASC 21)
Level of surplus places	-10 (xx%)
Welsh Medium Pupils	46 (PLASC 21)
ALN/SEN Pupils	17.8% (All Stages / PLASC 21)
Free School Meals	6.7% (PLASC 21)
Pupils from ethnic minorities	3.7% (PLASC 21)
Number of Teachers	6.5 (PLASC 21)
Pupil Teacher Ratio	20.8 (PLASC 21)
National School Categorisation	Amber (2019)
	Sennybridge C.P. School was last inspected by Estyn in 2017. The school's current performance and prospects for improvement were rated Good.

Table 3 – Staff Numbers

Head	Deputy	ALNCo	Teacher & TLR	Teachers	LSAs	Office	Cleaning
1	1	1	1	5	8	1	2

Table 4 – Present & forecast pupil numbers

School	Jan 2022	Jan 2023	Jan 2024	Jan 2025	Jan 2026
Sennybridge Primary	135	124	120	126	127

Table 5 – Latest condition assessments (2016)

School	Condition	Suitability	Backlog
Sennybridge Primary	C	B/C	£1,023,132

2.2.4 Problems with the status quo – Sennybridge

Sennybridge County Primary school is currently slightly over-subscribed in numbers. The building is poor (condition C) and is not fully DDA compliant (suitability condition B/C). There is estimated backlog maintenance required of over £1M.

Substantial issues exist with the site, its access, egress and external layout. Access to the school from Defynnog Road is very narrow. It leads to a recently enlarged car park at the rear of the school but does not allow for passing places. Pedestrian access from the north is via steep and dilapidated steps adjacent to the cattle market. The surfacing of these steps is worn and uneven. Site safeguarding is a significant issue that has been raised in recent Estyn reports. Although the playing field has been fenced recently, the main school entrance is to the south of the building and visitors must cross the school playground to reach it. The entrance is not overlooked by an adjacent staff or administration room and the corresponding lack of supervision remains a significant impediment to the school's operation.

Assessment of the building shows that the current Sennybridge CP School has inadequate spaces for modern teaching. Overall the building itself is not too small, but its rooms are not the right size and they are not in the right place. Both of these issues are difficult to resolve. For example, increasing the size of a classroom by 10m² is disproportionately expensive and massively disruptive. All of the classrooms are either too large or too small. The arrangement of the school along a single corridor also restricts options for re-planning the building, which has resulted in a piecemeal series of modifications.

For Staff and Administration, the total space available is three quarters of the area recommended within BB99. The difficulties caused by this shortfall are compounded when there was an extension to the building, by the switching of the main entrance to the south of the building. The resultant layout meant that there is no adjacent office of staffroom offering easy supervision.

Substantial issues exist with many of the elements of the structure, most notably including:

- Flooring – The original terrazzo flooring and lower wall sections to the main school building have been overlaid with now dilapidated vinyl sheeting. The terrazzo itself is cracked and would require specialist repair if retained. Some areas of the school still feature the original woodblock or quarry tile flooring, which is now de-bonded and requiring replacement.
- Walls – External walls are uninsulated, and although they are in a generally sound condition the lack of insulation allows surface condensation and promotes mould growth within habitable rooms.
- Ceilings – Most classrooms have a reduced height suspended ceiling. Inspection has shown that the original cast iron heating panels remain in-situ. The hall ceiling is unimproved, and this contributes to the high reverberation time and poor acoustics.
- Roof Windows – Roof windows are generally original and dilapidated. There are several instances where high level clerestory windows remain as part of the building

fabric into rooms where a lower level suspended ceiling has been installed, meaning they no longer provide either light or ventilation to the rooms.

- Electrical Services - The amount of socket outlets distributed around the school is very limited. This leads to the use of extension leads that pose and trip hazard and fire risk. The school is long due a full rewire to bring up to modern standards and to comply with BS7671 electrical wiring regs.
- Heating - The heating system in the main school is generally in poor condition with varying heat emitters and poor controls. All pipework is aged and liable to failure. The system pipe work is in fair to poor condition and is also liable to failure.

2.3 Developments since completion of the SOC

On a meeting held the 8th of March 2022, Powys County Council made the confirmation that the cabinet will approve the submission of the Strategic Outline Case to Welsh Government. The proposal received full support from members of the council, stressing the need and desire to build a replacement school to meet the new ambition set out in the Powys Strategy for Transforming Education established the 20th of April 2020, which the school in its current condition would be unable to deliver upon. The Outline assessment summary highlighted they would address numerous issues relating to the poor condition of the building while ensuring that students are taught in fit for purpose facilities to improve their learner entitlement and experience; ultimately determining that the overall impact would be positive. The subsequent OBC document will be submitted to Welsh Government during July 2022.

2.4 Welsh Medium Education

Sennybridge C.P. School is a dual stream school, where pupils are either taught in their Welsh-medium stream or the English-medium stream. Current pupil numbers in the school's Welsh-medium stream are set out below.

Table 6: Current WM Pupils by Year

Year	Number of Welsh-medium pupils
Reception	9
Year 1	5
Year 2	10
Year 3	8
Year 4	8
Year 5	6
Year 6	10
TOTAL	56

This is 41.5% of pupils at the school. The school's Welsh-medium stream consists of two classes, one Foundation Phase class and one KS2 class.

The Welsh-medium provision at the school serves the village of Sennybridge and its surrounding areas, and is located approximately nine miles to the west of Brecon.

Welsh-medium primary provision is also available elsewhere in the catchment at Ysgol y Bannau, a Welsh-medium Primary School located on the outskirts of Brecon. The school has a current population of 117 and has a total capacity of 162 places.

Welsh-medium secondary provision is available in the catchment, at Brecon High School's Welsh-medium stream. In addition, some Welsh-medium pupils from the catchment, in particular those living in the Sennybridge area, transfer to Welsh-medium secondary provision which is located out of county, at Ysgol Gymraeg Ystalyfera Bro Dur which is located in Neath Port Talbot.

The Council has recently approved a new Welsh in Education Strategic Plan (WESP) for 2022-32, which recognises the important role the education system will play in order to increase the number of Welsh speakers in Powys and contribute towards the Welsh Government target to have a million Welsh speakers by 2050. The WESP sets out an ambitious target to increase the percentage of Year 1 pupils being taught through the medium of Welsh in Powys by 14 percentage points to 36%. To contribute to this target, the Council's aim is to see an increase in the pupils accessing Welsh-medium provision at Sennybridge C.P. School and across the Brecon catchment.

'We will improve access to Welsh-medium provision across all key stages' is also a Strategic Aim in the Council's Strategy for Transforming Education in Powys 2020-30. Under this aim, the Council sets out a Strategic Objective to 'Move schools along the language continuum'.

2.5 Childcare/Nursery Provision

There is currently maintained Welsh-medium and English-medium childcare/nursery provision at Sennybridge CP school.

Powys County Council is committed to providing suitable infrastructure to enable providers to provide the 30-hour childcare scheme. Whether or not there is a need to incorporate nursery /early years provision will be a key consideration in respect of any construction project, particularly so where this includes primary provision. As this scheme proceeds, the Council will take a holistic approach based on community needs to determine whether early years provision, including nursery provision, is required as part of the scheme.

A community use strategy is also developed as part of all construction schemes, and consideration will be given in the design stages as to the need for provision such as after school, breakfast and holiday clubs.

2.6 Active Travel

It is the council's view that active travel is essential to encourage staff, pupils and wider members of the community to walk and cycle to new facilities, meaning that more people can enjoy the benefits of active travel.

Any construction project taken forward based on this OBC will be developed in line with the Welsh Government Active Travel Wales Act (2013) and design guidance, with the aim of improving active travel links. The Transport Assessment undertaken at RIBA Stage 2 identified the following points in relation to different forms of active travel:

2.6.1 Walking accessibility

It is considered that journeys of up to 2km (approximately 25-minute walk) represent the preferred maximum acceptable walking distance (Guidelines for Providing Journeys on Foot, IHT, 2000). A 25-minute walk extends throughout Sennybridge neighbouring Defynnog is within a 25-minute walk, providing access to bus stops and various services, including shops, a post office and food and drink outlets. To the south of the proposed development and to the southern extent of Pentre'r-felin (north of the proposed development). It is important to note that some routes may not be appropriate walking routes for all users, for example, the A40, west of Sennybridge, where no footway is present.

The existing mode share identifies that 9.7% of pupils currently walk to school, with a slightly higher proportion at 13.9% identifying that this would be their preferred method of travelling to school. This would equate to 25 pupils at an occupancy level of 180 pupils.

2.6.2 Cycling accessibility:

A 5km cycle from the proposed development extends throughout Sennybridge and Defynnog to Trecastle in the west and Abercamlais in the east. It should be noted that the gradient of some of the routes may affect the preferred cycle distance of some users.

The existing mode share recorded no existing pupil or staff cycle trips, however. The travel surveys completed identified that 37 pupils would prefer to travel to school by bike or scooter. Of these, 26 pupils stated the reason they do not travel by these modes currently is because there is nowhere to leave their bike or scooter at school. It is therefore recommended that the proposed development provides a minimum of 16 cycle parking spaces, to encourage modal shift to more sustainable means of transport. Room should be allocated on site for an additional 10 spaces if needed and cycle parking usage should be monitored and capacity recorded, as part of the Travel Plan Monitoring Programme.

The BREEAM Guidance states that compliance with cycling for pupils can be based on the provision of adequate storage space for cycling equipment and changing in a suitable place; showers do not need to be provided for pupils.

The number of additional facilities for staff should be based on 1 locker per 10 staff and 1 shower per 100 staff. The proposed development will accommodate 180 pupils, an increase of 25.6% from the existing 134 pupils. If staffing levels were to increase in line with pupil

numbers, there would be an additional four members of staff. Therefore, for a total of 19 staff members, two lockers should be provided.

2.7 Community/Sports Facilities

There is a small community gym in Sennybridge CP. However, the closest Community/Sports Facilities are currently provided at Brecon Leisure Centre.

Community facilities are included within the new design, to include a community room and gym storage facilities. The gym equipment is privately owned and will be brought into the community room or the school hall for use by the community weekly. The outdoor sports facilities and forest school area at the new school building will also be available for community use.

2.8 Equalities, Impact Assessments and Children's Rights Assessments

PCC completed a full impact assessment (IA) for the scheme following the completion of the SOC. This IA incorporated assessment against a range of legislative requirements that support effective decision making, ensuring compliance with all relevant legislation. Key areas assessed by the IA include:

- Impact on Vision 2025;
- Impact on Welsh Governments well-being goals;
- Impact on the Councils sustainable development principles.

As part of the process of compiling the IA the governing body, staff, pupils, ALN team, Children Services and School Services were all consulted with.

This overall summary and judgement of the IA suggests that the impact of the proposals would be positive. The development of a new building to replace the current Sennybridge Primary School building would address many issues related to the poor condition of the current building, ensuring that future pupils would be taught in facilities that are fit-for-purpose, improving their learner entitlement and experience. The new facilities would be fully DDA compliant, supporting learners with disabilities. Further opportunities for integration between the school and other services, to have a positive impact on the health and well-being of pupils attending the school and their families.

2.9 Net Zero Carbon and the Environment

The Council is committed to ensuring that all projects are Net Zero Carbon with immediate effect. The Sennybridge school will align with the last WG direction Zero Carbon in use and <800kg CO²/m² principles. This includes the following elements:

- The school will be designed on a 'fabric-first' basis, and will maximise beneficial solar gain in order to reduce heating demand;

- The concept design will be assessed by Passivhaus designers to confirm that it is can be delivered as a certified Passivhaus building;
- Heating will be provided via Air Source Heat Pumps, which will benefit from future electrical grid de-carbonisation;
- A PV array will be installed on the large, south facing roof;
- There will be no carbon fuel source used on the site;
- The school will be designed around a timber frame to reduce the embodied carbon load.

2.10 Main Benefits

The main benefits associated with the strategic case are outlined below.

Table 7 – Main Benefits by Investment Objective

Investment Objectives	Benefit
<p>1. Provide a stimulating teaching and learning environment in state of the art, 21st Century facilities that will impact positively on the self-esteem and well-being of all pupils and deliver the new curriculum for Wales.</p>	<ul style="list-style-type: none"> • Improved motivation of students and teachers – less sickness absence and improved school attendance rates. • Improved pupil satisfaction and a reduction in the number of incidences of poor behaviour. • Opportunities for teachers to broaden their skill sets. • Delivery of the broadest curriculum. • Schools will be able to attract new teaching staff as a result of the breadth and depth of curriculum. • Improved reputation of the school. • Improved educational outcomes. • Increased numbers of learners who transfer into further and higher education. • Increased number of opportunities for young people to engage with technology.
<p>2. Remove non DDA compliant poor condition buildings, reduce backlog maintenance and provide environmentally sustainable schools incorporating zero net carbon principles which improve the building’s efficiency and running costs.</p>	<ul style="list-style-type: none"> • Reduced backlog maintenance and accessibility costs. • School campus become DDA compliant. • School campus becomes Zero net carbon contributor to the environment. • Reduced energy costs and usage.

Investment Objectives	Benefit
<p>3. Develop Community-focused schools that are the central point for multi-agency services to support children, young people, families and the community.</p>	<ul style="list-style-type: none"> • Opportunities for lifelong learning in the Sennybridge community. • Improved leisure opportunities and usage in the Sennybridge community • Improved financial viability of leisure offerings through increased take up and use of facilities.
<p>4. Provide Early Years facilities that meet the needs of all children and enable the effective delivery of the Curriculum for Wales</p>	<ul style="list-style-type: none"> • Increased availability of early years places in the Sennybridge area. • Full and effective delivery of the Curriculum for Wales.
<p>5. To meet and stimulate demand for Welsh-medium provision</p>	<ul style="list-style-type: none"> • An increase in the number / % of pupils studying through the medium of Welsh • More opportunities for Welsh speaking staff. • Bilingual training and employees. • Increased availability of suitably qualified Welsh speaking employees in the Sennybridge area. • Promotes bilingual ethos.
<p>6. To provide an optimal safeguarding environment.</p>	<ul style="list-style-type: none"> • Reduction in the number of safeguarding incidents in the Sennybridge area; • Better environment (by design) to provide safe space for children in the new schools.
<p>7. Ensure that all pupils with SEN/ALN are placed in a provision that meets their needs, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential.</p>	<ul style="list-style-type: none"> • Bespoke provision for SEN/ALN pupils. • Increased provision of specialist teaching support. • Improved facilities for SEN/ALN learners.

2.11 Main Risks

The main risks associated with the strategic case are outlined below.

Table 8 – Strategic Risks and Countermeasures

Main Risk	Counter Measures
Business and Political Risks	
1. An unexpected reduction in the level availability of capital or revenue funding leads to delays and reduction in the scope of the project.	1. No contractual commitments will be made until firm assurances have been given regarding the affordability and availability of funding.
2. The project requires political endorsement	2. The Council's Cabinet has given approval in principle to the project and will be kept informed as the project develops.
3. Pupil numbers fall in the short term, making it more difficult to make the case	3. Detailed (long term) strategic planning about Welsh & English Medium education in the area to underpin the business case.
Service Risks	
1. Legislative changes.	1. Plan flexibility into the options where possible.
2. WG policy changes	2. Plan flexibility into the options where possible.
External Environmental Risks	
1. Issues relating to planning permission or planning constraints	1. Early engagement with the Local Authority Planning Department on the proposed site and to identify any issues relating to planning permission or planning constraints.
2. Covid 19	2. Early engagement with contractors to establish an appropriate risk response

2.12 Project Constraints

The project is subject to the following constraints:

- Availability of capital funding from Welsh Government and Powys County Council for any new build required;
- Any planning consent which may be required for any new build required'
- Requirement to meet BREEAM Excellent standard;
- Requirement to meet zero net carbon standards (by Welsh Government)

- Need to minimise negative impact on current pupils.

2.13 Project Dependencies

The project dependencies are as follows:

- Political support at local and national level;
- Stakeholder support – parents, governors, community, diocesan education authority;
- Capital funding from Welsh Government and Powys County Council;
- Internal officer capacity;
- Capacity of other service areas to provide support;
- Planning permission and any other statutory consents that may be required.

3 Economic Case

3.1 Critical Success Factors

CSF1: Strategic Fit

- The option must satisfy all 5 investment objectives and business needs
- The option must optimise the benefits as presented in the Main Benefits Criteria
- The option must be aligned with and promote the national, regional and local strategies

CSF2: Potential Value for Money (VFM)

- The option must optimise the resources available for the delivery of learning
- The option must provide value for money in the delivery of learning

CSF3: Potential Achievability

- The option must be acceptable to learners, staff, governors and the wider community;
- The option must be politically acceptable at local, county and national level;
- The option must be achievable within current legislation;
- The options must be operationally achievable/physically achievable.

CSF4: Supply side Capacity and Capability

- The option must secure sufficient appropriate resources and expertise to be deployed within Powys to achieve the investment objectives.

CSF5: Potential Affordability

- The extent to which the option is affordable within the forecasted revenue of participating organisations;
- The extent to which the option is affordable within the forecasted capital finding of participating organisations.

3.2 Long List Options

The long list of options was generated by a cross departmental group of stakeholders at a workshop held on Wednesday 17th November 2021. The following individuals were present at this workshop:

- Marianne Evans – Senior Manager Education Services;
- Sarah Astley – Programme Manager;
- Diane Rees – Project Manager
- Eurig Towns – Service Manager for School Improvement;
- Mari Thomas – Finance Manager;
- Sharon Hughes – Senior Foundation Phase Advisor.

3.3 Scope Appraisal

3.3.1 Options

- **Do Nothing:** 125 place 4-11 dual stream Primary School
- **Minimum Scope:** 150 place 4-11 dual stream community Primary school
- **Intermediate Scope A:** 150 place 4-11 dual stream community Primary school, plus early years provision
- **Intermediate Scope B:** 180 place 4-11 dual stream community Primary school
- **Maximum Scope:** 180 place 4-11 dual stream community Primary school, plus early years provision

3.3.2 Advantages and Disadvantages

Table 9 – Scope advantages and disadvantages

Do Nothing: 125 place 4-11 dual stream Primary School	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Replicates the existing school size; • Provides a future proofed school, based on current pupil/population forecasts; • Minimises disruption to Sennybridge pupils, parents and teachers; • Continuation of Welsh Medium Education in the Sennybridge area. 	<ul style="list-style-type: none"> • Does not address shortage of places at Sennybridge Primary school; • Does not maintain early years provision in the local community; • Does not enable wider integration of school within the community; • Does not create new opportunities for additional income streams for the schools; • Does not collocate early years childcare provision at the site. • Does not address backlog maintenance issues. • Does not address the poor condition of the current estate • Does not address the accessibility issues of the building.
Minimum Scope: 150 place 4-11 dual stream community Primary school.	
Advantages	Disadvantage
<ul style="list-style-type: none"> • Replicates the existing school size. • Provides a future proofed school, based on current pupil/population forecasts; • Enables the curriculum to be delivered in a continuous and coherent way from the 	<ul style="list-style-type: none"> • Does not collocate early years childcare provision at the site.

<p>Foundation Stage through to the end of Key Stage 2;</p> <ul style="list-style-type: none"> • Maintains early year and primary age provision in the local community. • Minimises disruption to Sennybridge pupils, parents and teachers; • Enables wider integration of the school within the community; • Continuation of Welsh Medium Education in the Sennybridge area. 	
<p>Minimum Scope: 150 place 4-11 dual stream community Primary school, plus early years provision</p>	
<p>Advantages</p>	<p>Disadvantages</p>
<ul style="list-style-type: none"> • Replicates the existing school size. • Provides a future proofed school, based on current pupil/population forecasts; • Enables the curriculum to be delivered in a continuous and coherent way from the Foundation Stage through to the end of Key Stage 2; • Maintains early year and primary age provision in the local community; • Minimises disruption to Sennybridge pupils, parents and teachers; • Enables wider integration of the school within the community; • Continuation of Welsh Medium Education in the Sennybridge area; • Collocated early years childcare provision on the one site. 	
<p>Intermediate Scope: 180 place 4-11 dual stream community Primary school</p>	
<p>Advantages</p>	<p>Disadvantages</p>
<ul style="list-style-type: none"> • Provides a future proofed school, with room for growth. • Minimises disruption to Sennybridge pupils, parents and teachers. • Continuation of Welsh Medium Education in the Sennybridge area 	<ul style="list-style-type: none"> • Introduces unnecessary surplus pupil places to the school. • Does not collocate early years childcare provision at the site.
<p>Maximum Scope: 180 place 4-11 dual stream Primary school, plus early years provision</p>	
<p>Advantages</p>	<p>Disadvantages</p>

- | | |
|--|--|
| <ul style="list-style-type: none">• Provides a future proofed school, with room for growth.• Enables the curriculum to be delivered in a continuous and coherent way from the Foundation Stage through to the end of Key Stage 2.• Maintains early years and primary age provision in the local community.• Minimises disruption to Sennybridge pupils, parents and teachers.• Enables wider integration of the school within the community.• Continuation of Welsh Medium Education in the Sennybridge area. | <ul style="list-style-type: none">• Introduces unnecessary surplus pupil places at the school. |
|--|--|

3.3.3 Conclusion

Table 10 – Scope appraisal summary

Reference to:	Do Nothing	Min	Int. A	Int. B	Max
Investment Objectives					
Provide a stimulating teaching and learning environment in state of the art, 21st Century facilities that will impact positively on the self-esteem and well-being of all pupils and deliver the new curriculum for Wales.	✓	✓	✓	✓	✓
Remove non DDA compliant poor condition buildings, reduce backlog maintenance and provide environmentally sustainable schools incorporating zero net carbon principles which improve the building's efficiency and running costs.	✓	✓	✓	✓	✓
Develop Community-focused schools that are the central point for multi-agency services to support children, young people, families and the community.	x	x	✓	x	✓
Provide Early Years facilities that meet the needs of all children and enable the effective delivery of the Curriculum for Wales	x	x	✓	x	✓
To provide Welsh-medium provision that is accessible and equitable in a dual stream school	✓	✓	✓	✓	✓
To provide an optimal safeguarding environment.	✓	✓	✓	✓	✓
Ensure that all pupils with SEN/ALN are placed in a provision that meets their needs, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential.	✓	✓	✓	✓	✓
Critical Success Factors					
Business Need	x	✓	✓	x	x
Strategic Fit	x	✓	✓	x	✓
Potential VFM	x	✓	✓	x	x
Benefits optimisation	?	x	✓	x	x
Potential achievability	✓	✓	✓	✓	✓
Supply side capability	✓	✓	✓	✓	✓
Affordability	✓	✓	✓	x	x
Summary	Carry Forward	Discounted	Preferred	Discounted	Discounted

3.4 Service Solution Appraisal

3.4.1 Options

- Option 1 - Do nothing - Close the existing school and relocate pupils to nearest schools.
- Option 2 - Business as usual (BAU).
- Option 3 - Remodel the existing building and outside area.
- Option 4 - Build extension to the existing school.
- Option 5 - New Build school on existing site.
- Option 6 - New build School on alternative site.

3.4.2 Advantages and Disadvantages

Table 11 – Project B: Service solution advantages and disadvantages

Option 1 - Do nothing - Close the existing school and relocate pupils to nearest schools.	
Advantages	Disadvantages
<ul style="list-style-type: none"> • No capital spend required. • Enables alternative use of capital funding within the programme envelope. • Addresses current backlog maintenance issues of £1.023m. • Releases site for generation of a capital receipt. 	<ul style="list-style-type: none"> • Current school location provides education to a large rural catchment area. • Significant additional travel for pupils • Relocation to nearest schools not appropriate to the location of catchment of the school. • Insufficient capacity in other schools to accommodate pupils • Pupils may need to be educated in neighbouring county. • Loss of facilities to the community. • Would not promote access to Welsh-medium education for pupils living in Sennybridge • Interruption of Welsh Medium Education in Sennybridge. • Threat to the future viability of the Welsh Language in the Sennybridge area. • Statutory process would be required
Option 2 - Business as usual (BAU).	
Advantages	Disadvantages
<ul style="list-style-type: none"> • No additional capital funding needed. • No disruption to learners from large scale building works on adjacent site. • Continuity of education on Sennybridge School site. • Continuity of Welsh-medium education in Sennybridge 	<ul style="list-style-type: none"> • Inadequate school buildings continue in poor condition and sustainability • Does not meet the requirements for 21st C School • Financially unviable due to costs of repairs and maintenance • Unlikely to enhance current public perception of the school. • Would not provide additional capacity
Option 3 - Remodel the existing building and outside area.	

Advantages	Disadvantages
<ul style="list-style-type: none"> • Extends the life of the building. • Addresses immediate issues easily. • Reduces the probability of disruption to service delivery. • Less immediate drain on Council's capital resources. • Removes £1.032M backlog Maintenance liability. • Continuity of Welsh-medium education in Sennybridge 	<ul style="list-style-type: none"> • Inadequate school buildings continue with poor suitability and sustainability factors • Does not enhance current public perception of the condition of the facilities • Disruption to pupils • Does not improve the learning environment and does not provide a suitable environment • The works required at Sennybridge CP could severely impact the Major Improvement fund, which will decrease the amount of funding available for much needed improvements at other schools. • Would not provide additional capacity
Option 4 - Build extension to the existing school.	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Less Capital cost required. • Would provide additional capacity • Continuity of Welsh-medium education in Sennybridge 	<ul style="list-style-type: none"> • Does not address the building condition of existing school. • Building works funded by Major Improvement fund will still be required in future. • Disruption to pupils, as extension would also require elements of demolition. • Financially unviable. • Capacity of school is not an issue.
Option 5 - New Build school on existing site.	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Delivers a new build school which extends the time horizon for the requirement for substantial future works into the long term. • Removes backlog maintenance of circa £1.032m. • Will enable energy efficiencies reducing the buildings carbon footprint and ongoing running costs. • Provision of appropriate number of school pupil places. • Addresses condition, suitability and sustainability issues in current school. • Reaffirms the strategy to keep Primary schools in strategic locations. • New building will be condition A. • Meets BREEAM and environmental building standards. 	<ul style="list-style-type: none"> • Larger capital investment required from an already over-stretched capital budget. • Substantial noise disruption to existing school setting during building work. • May require temporary relocation of School pupils during building work and associated costs of this.

<ul style="list-style-type: none"> • Potentially attractive to local community and stakeholders. • Appropriate facilities for teaching and learning for 21C curriculum. • Provides community focussed facilities. • Continuity of Welsh-medium education in Sennybridge 	
<p>Option 6 - New Build school on alternative site.</p>	
<p>Advantages</p>	<p>Disadvantages</p>
<ul style="list-style-type: none"> • Delivers a new build school which extends the time horizon for the requirement for substantial future works into the long term. • Removes backlog maintenance of circa £1.032m. • Will enable energy efficiencies reducing the buildings carbon footprint and ongoing running costs. • Provision of appropriate number of school pupil places. • Addresses condition, suitability and sustainability issues in current school. • Reaffirms the strategy to keep Primary schools in strategic locations. • New building will be condition A. • Meets BREEAM and environmental building standards. • Appropriate facilities for teaching and learning for 21C curriculum. • Provides community focussed facilities. • No relocation of pupils required during construction period. • No noise disruption to pupils. • Continuity of Welsh-medium education in Sennybridge. 	<ul style="list-style-type: none"> • Larger capital investment required from an already over-stretched capital budget. • Additional capital required for land purchase of new site. • Availability of suitable and affordable land. • Potential alternative site has not yet been identified; • Depending on the location of the site delivery may have substantial implications on the cost of school transport.

3.4.3 Conclusion

Table 12 – Service Solution appraisal summary

Reference to:	1	2	3	4	5	6
Investment Objectives						
Provide a stimulating teaching and learning environment in state of the art, 21st Century facilities that will impact positively on the self-esteem and well-being of all pupils and deliver the new curriculum for Wales.	x	x	x	x	✓	✓
Remove non DDA compliant poor condition buildings, reduce backlog maintenance and provide environmentally sustainable schools incorporating zero net carbon principles which improve the building's efficiency and running costs.	x	x	?	?	✓	✓
Develop Community-focused schools that are the central point for multi-agency services to support children, young people, families and the community.	x	x	?	?	✓	✓
Provide Early Years facilities that meet the needs of all children and enable the effective delivery of the Curriculum for Wales	✓	✓	✓	✓	✓	✓
To provide Welsh-medium provision that is accessible and equitable in a dual stream school	x	✓	✓	✓	✓	✓
To provide an optimal safeguarding environment.	✓	✓	✓	✓	✓	✓
Ensure that all pupils with SEN/ALN are placed in a provision that meets their needs, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential.	x	✓	✓	✓	✓	✓
Critical Success Factors						
Business Need	x	x	?	?	✓	✓
Strategic Fit	x	x	✓	✓	✓	✓
Potential VFM	x	x	x	x	✓	✓
Benefits optimisation	x	x	x	x	✓	✓
Potential achievability	x	✓	✓	✓	✓	✓
Supply side capability	✓	✓	✓	✓	✓	✓
Affordability	✓	✓	✓	✓	✓	?
Summary	Discounted	Carry Forward	Discounted	Discounted	Preferred	Possible

3.5 Service Delivery Appraisal

3.5.1 Options

- Minimum – Local Authority delivery;
- Intermediate – Local Authority and Private Sector partner arrangements;
- Maximum – Private Sector partnership (PPP);

3.5.2 Advantages and Disadvantages

Table 13 – Service delivery advantages and disadvantages

Minimum: Local Authority	
Advantages	Disadvantages
<ul style="list-style-type: none"> • All requisite delivery structures are already in place; • Local Authority has extensive experience in delivering this service delivery model; • Cost effective model; • Strategic link to Councils School Transformation Programme; • Most expedient model for delivery; • Politically acceptable; • Limited risk due to specialist support within LA 	<ul style="list-style-type: none"> • May stifle innovation.
Intermediate: Local Authority and Private Sector Partner arrangements	
Advantages	Disadvantages
<ul style="list-style-type: none"> • All requisite delivery structures in place; • Local Authority has extensive experience in delivering this service delivery model; • Cost effective model; • Strategic link to Councils School Transformation Programme • Most expedient model for delivery; • Politically acceptable; • Limited risk due to specialist support within LA 	<ul style="list-style-type: none"> • Will prove more expensive for the Local Authority • Contractor may not be au fait with the workings and culture of Local Authority
Maximum: Private Sector partnership (PPP)	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Private sector suppliers will provide specialisms and capacity that the Local Authority alone cannot provide • Services can be delivered relatively quickly 	<ul style="list-style-type: none"> • Private contractor is an unknown quantity • Contractor may not be au fait with the workings and culture of Local Authority • Any private sector partnership will be unlikely to include local contractors; • Profit element of partnership may impact on funds available for development

3.5.3 Conclusion

Table 14 – Service Delivery appraisal summary

Reference to:	LA	LA & PSP	PPP
Investment Objectives			
Provide a stimulating teaching and learning environment in state of the art, 21st Century facilities that will impact positively on the self-esteem and well-being of all pupils and deliver the new curriculum for Wales.	✓	✓	✓
Remove non DDA compliant poor condition buildings, reduce backlog maintenance and provide environmentally sustainable schools incorporating zero net carbon principles which improve the building's efficiency and running costs.	✓	✓	✓
Develop Community-focused schools that are the central point for multi-agency services to support children, young people, families and the community.	✓	✓	✓
Provide Early Years facilities that meet the needs of all children and enable the effective delivery of the Curriculum for Wales	✓	✓	✓
To provide Welsh-medium provision that is accessible and equitable in a dual stream school	✓	✓	✓
To provide an optimal safeguarding environment.	✓	✓	✓
Ensure that all pupils with SEN/ALN are placed in a provision that meets their needs, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential.	✓	✓	✓
Critical Success Factors			
Strategic Fit	✗	✓	✗
Potential VFM	?	✓	✗
Potential achievability	✗	✓	✓
Supply side capability	✗	✓	✓
Affordability	✗	✓	✗
Summary	Discounted	Preferred	Discounted

3.6 Implementation Appraisal

3.6.1 Options

- Minimum – New Schools open September 2025;
- Intermediate – New School opens Spring Term 2025;
- Maximum - New School opens September 2024;

3.6.2 Advantages and Disadvantages

Table 15 – Implementation advantages and disadvantages

Minimum: New School opens September 2025	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Lack of disruption to education in the short term 	<ul style="list-style-type: none"> • Local community disruption due to extended period of works; • Delayed to accrual of scheme benefits • Immediate cohorts of learns miss out unnecessarily on 21st Century school facilities
Intermediate: New School opens Spring Term 2025	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Immediate cohorts of learns enjoy 21st Century school facilities within a reasonable period of time • Minimises disruption to learners once school becomes operational; • Ensures Local Authority funding allocation is spent within Welsh Government timescales • Allows time for innovation in design but ensures completion within a reasonable time scale; • Minimises local community disruption. 	<ul style="list-style-type: none"> • Partial delay to accrual of scheme benefits
Maximum: New School opens September 2024	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Immediate cohorts of learns enjoy 21st Century school facilities within a reasonable period of time • Minimises disruption to learners once school becomes operational; • Ensures Local Authority funding allocation is spent within Welsh Government timescales • Ensures completion in a timely manner; • Minimises local community disruption. 	<ul style="list-style-type: none"> • Potential for rushed design (lack of innovation); • Timescales may be unrealistic due to lead in time for sourcing materials • Requires additional bespoke resource for project in order to deliver upon demanding timescale.

3.6.3 Conclusion

Table 16 – Implementation appraisal summary

Reference to:	Sept 25	Spring 25	Sept 24
Investment Objectives			
Provide a stimulating teaching and learning environment in state of the art, 21st Century facilities that will impact positively on the self-esteem and well-being of all pupils and deliver the new curriculum for Wales.	✓	✓	✓
Remove non DDA compliant poor condition buildings, reduce backlog maintenance and provide environmentally sustainable schools incorporating zero net carbon principles which improve the building's efficiency and running costs.	✓	✓	✓
Develop Community-focused schools that are the central point for multi-agency services to support children, young people, families and the community.	✓	✓	✓
Provide Early Years facilities that meet the needs of all children and enable the effective delivery of the Curriculum for Wales	✓	✓	✓
To provide Welsh-medium provision that is accessible and equitable in a dual stream school	✓	✓	✓
To provide an optimal safeguarding environment.	✓	✓	✓
Ensure that all pupils with SEN/ALN are placed in a provision that meets their needs, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential.	✓	✓	✓
Critical Success Factors			
Strategic Fit	✓	✓	?
Potential VFM	✓	✓	✓
Potential achievability	✓	✓	x
Supply side capability	✓	✓	✓
Affordability	✓	✓	✓
Summary	Possible	Preferred	Discounted

3.7 Funding Appraisal

3.7.1 Options

- Minimum – Wholly Local Authority funded from capital programme;
- Intermediate - Mix of Local Authority borrowing and Welsh Government funding;
- Maximum - Wholly Welsh Government grant funded.
- Alternative – Mutual Investment Fund (MIM).

3.7.2 Advantages and Disadvantages

Table 17 – Funding advantages and disadvantages

Minimum: Wholly Local Authority funded from capital programme.	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Wouldn't require any additional Local Authority borrowing; • Maximum control over scale and timescale of scheme. 	<ul style="list-style-type: none"> • Diverts capital from other community priorities such as Social Care and highways; • Cost prohibitive. • Affordability
Intermediate: Mix of Local Authority borrowing and Welsh Government funding.	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Ensures affordability of scheme; • Provides certainty to Welsh Government i.e. the scheme fits strategically; • Allows for the direction of capital monies to other community priorities. 	<ul style="list-style-type: none"> • Repayment costs for Local Authority may impact on revenue budgets; • Welsh Government grant funding requirements may be onerous; • Application process may delay delivery.
Maximum: Wholly Welsh Government grant funded.	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Enables major capital investment in other community priorities. 	<ul style="list-style-type: none"> • Welsh Government grant funding requirements may be prohibitive; • Application process may delay delivery. • May stifle innovation.
Alternative: Mutual Investment Model	
Advantages	Disadvantages
<ul style="list-style-type: none"> • No capital funding required up front; • Sponsorship from Welsh Government; • Cost certainty (capital and revenue); • Welsh Governments preferred model. 	<ul style="list-style-type: none"> • Development partners may not be interested; • Complex ownership and governance model; • Multifaceted governance may stifle innovation.

3.7.3 Conclusion

Table 18 – Funding appraisal summary

Reference to:	WG 100%	Mix	LA 100%	MIM
Investment Objectives				
Provide a stimulating teaching and learning environment in state of the art, 21st Century facilities that will impact positively on the self-esteem and well-being of all pupils and deliver the new curriculum for Wales.	✓	✓	✓	✓
Remove non DDA compliant poor condition buildings, reduce backlog maintenance and provide environmentally sustainable schools incorporating zero net carbon principles which improve the building's efficiency and running costs.	✓	✓	✓	✓
Develop Community-focused schools that are the central point for multi-agency services to support children, young people, families and the community.	✓	✓	✓	✓
Provide Early Years facilities that meet the needs of all children and enable the effective delivery of the Curriculum for Wales	✓	✓	✓	✓
To provide Welsh-medium provision that is accessible and equitable in a dual stream school	✓	✓	✓	✓
To provide an optimal safeguarding environment.	✓	✓	✓	✓
Ensure that all pupils with SEN/ALN are placed in a provision that meets their needs, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential.	✓	✓	✓	✓
Critical Success Factors				
Strategic Fit	✗	✓	✓	?
Potential VFM	✓	✓	✓	✓
Potential achievability	✓	✓	?	?
Supply side capability	?	✓	?	?
Affordability	✗	✓	✓	✓
Summary	Discounted	Preferred	Discounted	Possible



3.8 Summary of appraisals

Table 19 – Long List Summary

Scope appraisal	Do Nothing: 125 place 4-11 dual stream Primary School	Do Min: 150 place 4-11 dual stream Primary School	Intermediate A: 150 place 4-11 dual stream community Primary school, plus early years provision	Intermediate B: 180 place 4-11 dual stream community Primary school	Maximum: 180 place 4-11 dual stream community Primary school, plus early years provision	
Service solution	Do nothing - Close the existing school and relocate pupils to nearest schools.	Business as usual (BAU).	Remodel the existing building and outside area.	Build extension to the existing school.	New Build School on existing site	New Build school on new site
Service Delivery	Minimum: LA Delivery		Intermediate: LA and Private Sector Delivery		Maximum: Private Sector partnership (PPP)	
Implementation	Minimum: New School opens September 2025		Intermediate: New School opens Spring Term 2025		Maximum: New School opens September 2024	
Funding	Minimum: Wholly LA Funded	Intermediate: Mixed LA & WG Funded		Maximum: Wholly WG Funded	Alternative: Mutual Investment Fund	

As a result of the appraisal exercise, and the comparison of each option with the Investment Objectives and Critical Success Factors, the following options have been short-listed for economic appraisal:

- Option 2: Do Nothing – Business as Usual.
- Option 5: New build 150 place 4-11 dual stream community Primary School with early years provision in Sennybridge on existing site.
- Option 6: New build 150 place 4-11 dual stream community Primary School with early years provision in Sennybridge on alternative site.

3.9 Economic Appraisal

The following tables summarise key results of the economic appraisals for each option. Values used for the economic analysis are expressed in base year terms. Options have been risk-adjusted to account for the 'risk retained' (in £s) by the organisation under each option.

3.9.1 Cost Components

Please note that the revenue / lifecycle cost totals shown in the tables above consist of the elements shown in the table below.

Table 20 – Cost Components

Option	Years	Cost Elements	Undiscounted Value (£'000)
Do Nothing	Years 0 – 19	Existing Revenue Cost	£546k (per annum)
	Years 0 – 19	Lifecycle Cost	£1,098m (term)
Option 5 & Option 6	Years 0 – 3	Existing Revenue Cost	£546k (per annum)
	Year 4	Transitional Revenue Cost	£554k (per annum)
	Year 5 – 59	New Revenue Cost	£559k (per annum)
	Years 0 – 59	Lifecycle Cost	£5,263 (term)

3.9.2 Net Present Cost Project

Table 21 – Economic Appraisal

Discounted Cash flow (DCF) Summary Sheet		Inc. Optimism Bias		Excl. Optimism Bias	
Option No.	Option Name/Description	NPC (£m)	EAC (£m)	NPC (£m)	EAC (£m)
Option 2:	Do nothing – business as usual	10.0	0.68	10.0	0.68
Option 5:	New build 5 classroom school on the grassed area of Sennybridge CP School to include Early Years facility and community room.	27.2	1.04	25.0	0.95
Option 6:	New build 5 classroom school on an alternative site within the area to include Early Years facility and community room.	27.8	1.06	25.4	0.97

DCF = Discounted Cash flow

NPC = Net Present Cost

EAC = Equivalent Annual Cost

Option 2 was appraised over 20 years, while options 5 and 6 were appraised over 60 years. This is because Option 2 is essentially 'Do Minimum' option, where the effective life of the asset is expected to be 20 years.

On that basis, the key comparator from the Economic Appraisal table is the Equivalent Annual Cost (EAC), which calculates the average annual (economic) cost to the Council. On that basis, **Option 5 is the preferred economic choice.**

3.9.3 Summary of Economic Ranking

Table 22 – Economic Summary

Option	Description	Undiscounted	NPV
Do Nothing	Do nothing – business as usual	£13,454,946	£10,049,050
Option 5	New build 5 classroom school on the grassed area of Sennybridge CP School to include Early Years facility and community room.	£50,159,681	£27,220,524
Option 6	New build 5 classroom school on an alternative site within the area to include Early Years facility and community room.	£50,691,798	£27,780,580

3.9.4 Monte Carlo Simulation

In order to make the scenario planning more robust (and less linear), we have completed a Monte Carlo Simulation in this business case. The simulation uses the following cost elements as variables: backlog maintenance/new build capital, old revenue cost, new revenue cost, lifecycle cost, capital receipts and new community lettings. Monte Carlo simulation uses random number generation to provide a set of predictive results. Charting these results can allow you to determine the probability of a particular result or set of results occurring.

Each variable went through 1000 iterations of number generation to produce a Normal or Gaussian distribution of the potential results obtainable. A normal distribution for the data was chosen as the results should conform to central tendency theorem, being clustered around the estimated value rather than being uniformly distributed between two points.

Once the variables for each option were simulated, the results were used as the input for 27 different potential 'What if' scenarios based along the three dimensions of capital, revenue and savings. The scenarios were used to demonstrate the sensitivity between the different variables, providing 27 (+1 base value) different potential outcomes for NPC per option. A list of the 27(+1) scenario's, and the 28 NPC potential results for each option is shown in Appendix B: Monte Carlo Simulation.

Finally, the mean and standard deviation values for the 28 scenarios were used as the input variables for a further 1000 iterations of the simulation to produce a final Normal distribution curve for each of the four shortlisted options. The results are demonstrated in the two charts below.

Figure 2: Options Distributions

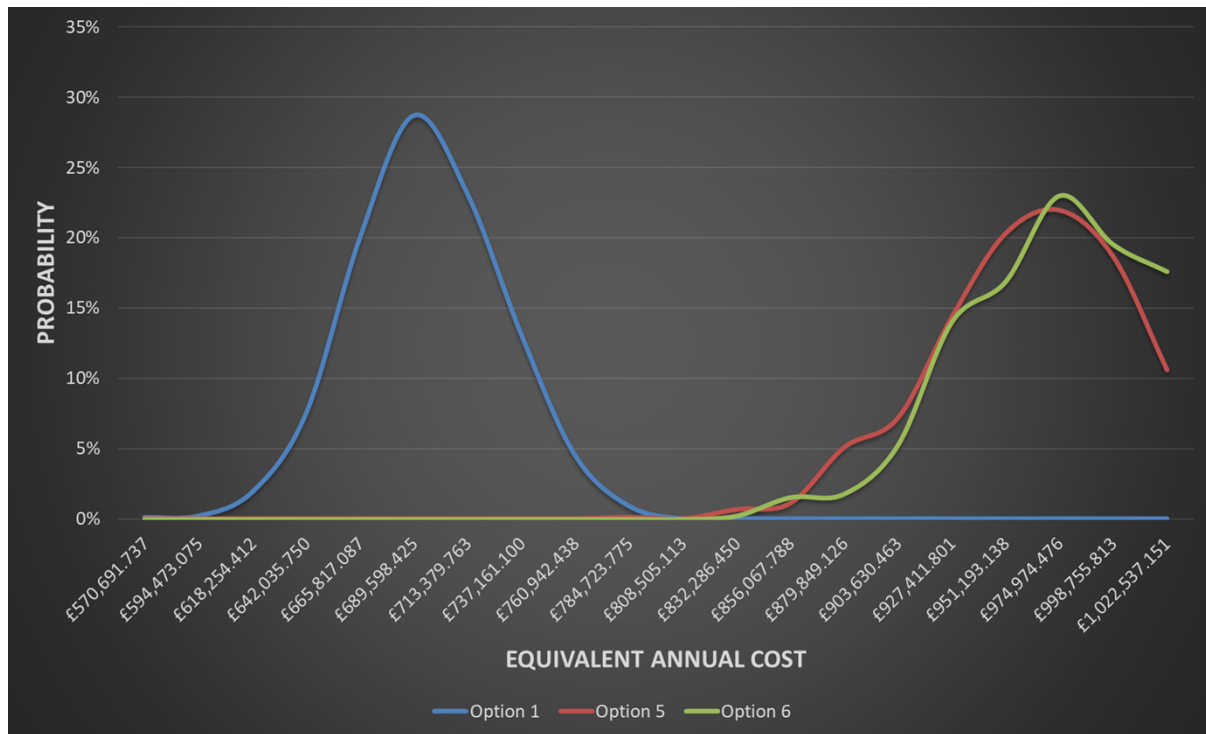


Figure 3: Cumulative Distributions

As can be seen from the first chart each option displays the typical bell shaped curve indicative of a Normal distribution. The probability of any value occurring within this distribution can be read off the chart. Both charts clearly indicate that option 1 (blue line) has the least expensive forecasted equivalent annual cost, while option 6 (green line) is the most expensive. The extreme difference between the BAU and ‘do something’ options is such that it would highly likely to be the least expensive option in almost any conceivable circumstance, with there only being a marginal overlap at the extreme tails of the probability distributions.

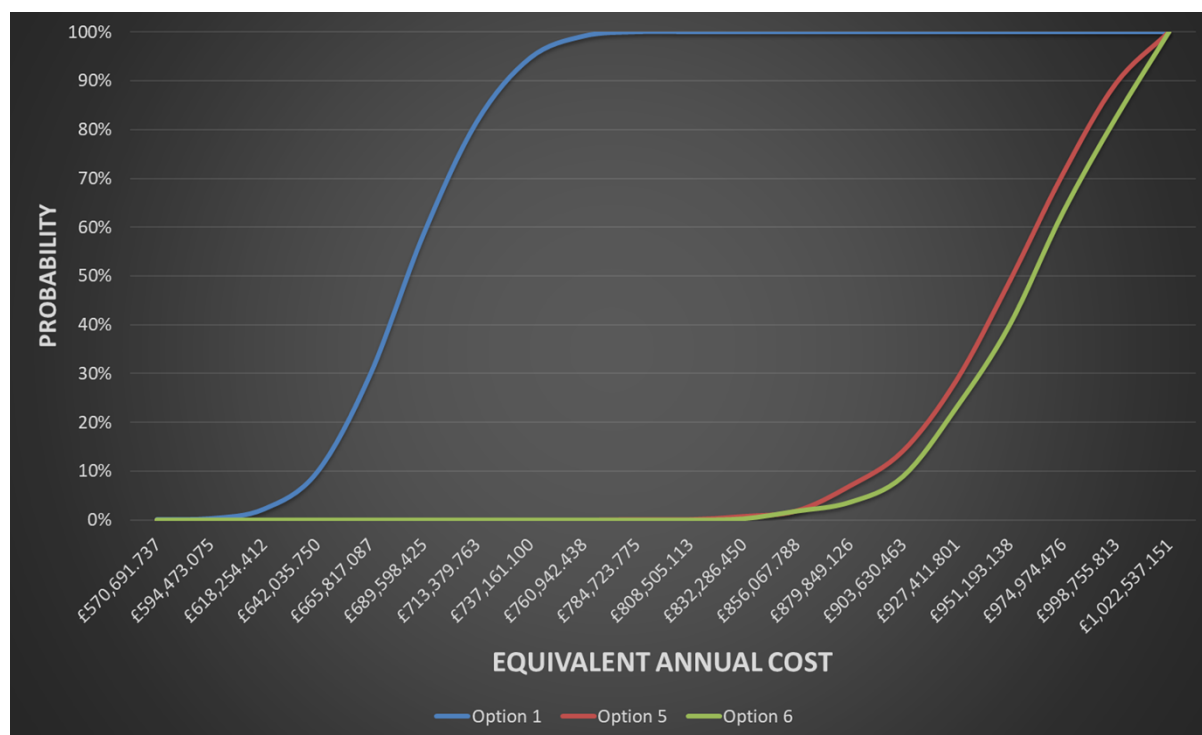


Table 23: Summary of Results

Rank Order	Total EAC	Scenario No.	Option No.	Revenue	Capital	Savings
1	£0.629	27	Option 1	Best Case Capital	Best Case Revenue	Expected Case Savings
2	£0.630	28	Option 1	Best Case Capital	Best Case Revenue	Best Case Savings
3	£0.630	26	Option 1	Best Case Capital	Best Case Revenue	Worst Case Savings
4	£0.646	18	Option 1	Expected Case Capital	Best Case Revenue	Expected Case Savings
5	£0.648	17	Option 1	Expected Case Capital	Best Case Revenue	Worst Case Savings
6	£0.649	19	Option 1	Expected Case Capital	Best Case Revenue	Best Case Savings
7	£0.662	9	Option 1	Worst Case Capital	Best Case Revenue	Expected Case Savings
8	£0.664	10	Option 1	Worst Case Capital	Best Case Revenue	Best Case Savings
9	£0.665	8	Option 1	Worst Case Capital	Best Case Revenue	Worst Case Savings
10	£0.666	23	Option 1	Best Case Capital	Expected Case Revenue	Worst Case Savings
11	£0.667	24	Option 1	Best Case Capital	Expected Case Revenue	Expected Case Savings
12	£0.667	25	Option 1	Best Case Capital	Expected Case Revenue	Best Case Savings
13	£0.682	15	Option 1	Expected Case Capital	Expected Case Revenue	Expected Case Savings
14	£0.683	1	Option 1	Base NPV	Base NPV	Base NPV
15	£0.683	14	Option 1	Expected Case Capital	Expected Case Revenue	Worst Case Savings
16	£0.684	16	Option 1	Expected Case Capital	Expected Case Revenue	Best Case Savings
17	£0.698	7	Option 1	Worst Case Capital	Expected Case Revenue	Best Case Savings

18	£0.700	5	Option 1	Worst Case Capital	Expected Case Revenue	Worst Case Savings
19	£0.700	6	Option 1	Worst Case Capital	Expected Case Revenue	Expected Case Savings
20	£0.702	20	Option 1	Best Case Capital	Worst Case Revenue	Worst Case Savings

Through ranking all the potential NPC results (28 x 3 options), it is possible to generate a total EAC score for each option. Each result was ranked from 1-84 with 84 points allocated for the lowest (least costly) potential NPC through to 1 for the highest (most costly) potential EAC. The scores were then cumulated for each option, with the highest score obtaining a final score of 100%, with the other options scoring a percentage of that. The final results are displayed within the table below:

Table 24: Summary of Overall Results:

Option No.	NPC	EAC
Option 1	£10,049,050	£683,152
Option 5	£27,220,524	£1,037,823
Option 6	£27,780,580	£1,059,176

Table 25: Summary of Overall Results:

Option No.	Score	Final Score
Option 1	1974	100.00%
Option 5	890	45.09%
Option 6	706	35.76%

3.10 Qualitative Benefits Appraisal

All of the benefits from the SOC were grouped into four categories, and the benefit groups were then weighted by the project team in order to provide an assessment against the five options.

Table 26 – Benefit Group examples

Benefit Groups	Example of Benefits (info in brackets = how achieved)	Weight
Standards and Breadth of Education	<ul style="list-style-type: none"> • More pupils with higher qualifications that can provide greater opportunities for future employment, training and education. • More opportunities for teachers' professional and personal development (e.g. through access to a wider range of teaching materials [state of the art ICT and emerging technologies] and accessing and sharing sector leading practice via Professional Learning Communities). • Employers will have young people with a greater range of employability skills. 	10%

Benefit Groups	Example of Benefits (info in brackets = how achieved)	Weight
Standards of Facilities and Estate	<ul style="list-style-type: none"> • Securing positive learning experiences. • Increased efficiency through school reorganisation and rationalisation. • Facilities which maximise the potential of both teachers and pupils. 	40%
Welfare of Children	<ul style="list-style-type: none"> • Improved safeguarding of children. • Less opportunities for children to be injured/hurt during their school lives. 	30%
Equality of opportunity	<ul style="list-style-type: none"> • Improved access to specialist ALN/SEN provision with the schools. 	20%

Each of the benefit groups were scored on a range of 0-10 for each option. These scores were agreed by the workshop participants to confirm that the scores were fair and reasonable.

Table 27 – Benefits Appraisal

Benefit Group	Weight	Maximum Score	Raw			Weighted		
			Option 2	Option 5	Option 6	Option 2	Option 5	Option 6
Standards of Education	10	10	7	9	9	70	90	90
Facilities and Estate	40	10	3	9	9	120	360	360
Welfare of Children	30	10	3	9	9	90	270	270
Equality of opportunity	20	10	3	9	9	60	180	180
Total	100	10	16	36	36	340	900	900
Rank			3	=1	=1	3	=1	=1

3.11 Risk Appraisal

The workshop assigned the risk scores shown in the following table on the basis of participants' judgment and assessment of previous procurements. The range of scales used to quantify risk followed the corporate risk assessment process. The likelihood and impact scores are summarised below:

Probability:

- Low = 1 - Not likely to occur or may happen once every 20 years.

- Medium = 2 - Possible or may happen within 10 years.
- High = 3 - Likely or may happen once a year.
- Very High = 4 - Certain or happens several times a year.

Impact:

- Low = 1.
- Medium = 2.
- High = 3.
- Catastrophic = 4.

The likelihood is multiplied by the impact score to provide a “risk score”. The main risks fall into three categories namely Service Risk (SR), Business Risk (BR) and External environmental risk (EER).

Table 28 – Risk Appraisal

No	Summary of Risk	Category	BAU	Option 5	Option 6
1.	The risk that there will be an undermining of customer’s/media’s perception of the organisation’s ability to fulfil its business requirements – for example, adverse publicity concerning an operational problem.	SR	2	2	2
2.	Continuity of 21st century funding not sustained by mainstream funding.	SR	2	3	3
3.	Newly redeveloped or built school may attract pupils from other schools or catchment areas.	EER	1	9	9
4.	Delay in WG approval of OBC.	SR/ EER	1	15	15
5.	Availability of Capital funding, both in terms of Capital allocation from WG and prudential borrowing.	SR	1	5	5
6.	Feasibility unproven - in terms of SIS/Ecology.	SR / EER	1	4	4
7.	Lack of stakeholder support for scheme.	SR	4	3	6
8.	Lack of adequate revenue funding stream.	SR	1	3	3
9.	Lack of timely decision making at Powys County Council.	SR	1	6	6
10.	Unsuccessful schools’ re-organisation and consultation process. Low level of public support for scheme.	EER	1	1	3
11.	Failure to develop and implement plan and processes to manage staff and learners prior, during and post commissioning of the new/ existing/alternative facilities.	SR	1	4	5
12.	For any number of unforeseen reasons, arising from risk and uncertainty, the construction costs increase beyond original cost estimates.	SR / EER	1	16	16

No	Summary of Risk	Category	BAU	Option 5	Option 6
13.	Failure to gain planning and environmental approvals or acquire land for new construction.	SR / EER	1	4	8
14.	Curriculum developed fails to engage learners - inadequate facilities to deliver broader curriculum.	SR	1	6	6
15.	Statutory consultation fails.	EER	0	0	0
16.	Health and Safety - e.g. Injuries/incidents during construction leading to delays/injury investigation/claims for compensation/prosecution.	SR	0	5	5
17.	The risk that design cannot deliver the services to the required quality of Educational Provision standards.	SR	0	1	1
18.	The risk that the construction of physical assets is not completed on time, to budget and to specification.	SR	1	6	12
19.	The risk that the quality/quantity of initial intelligence (for example, preliminary site investigation) will affect the likelihood of unforeseen problems occurring.	SR	1	6	9
20.	The risk arising in accommodation projects relating to the need to decant staff/clients from one site to another.	SR	0	0	0
21.	The risk that the nature of the project has a major impact on its adjacent area and there is a strong likelihood of objection from the public.	SR	0	1	1
22.	The risk that can arise from the contractual arrangements between two parties – for example, the capabilities of the contractor/ when a dispute occurs.	SR	1	2	4
23.	The risk that the quantum of service provided is less than that required under the contract.	SR	1	1	2
24.	The risk that the demand for a service does not match the levels planned, projected or assumed.	SR	1	2	4
25.	The risk that actual community usage of the service varies from the levels forecast as a benefit.	SR/ EER	0	2	4
26.	The risk that changes in technology result in services being provided using sub-optimal technical solutions.	SR / EER	0	2	2
27.	The risk relating to the uncertainty of the values of physical assets at the end of the contract period.	EER	0	1	1
28.	Profile of capital expenditure incorrect.	SR/ EER	0	0	0

No	Summary of Risk	Category	BAU	Option 5	Option 6
29.	The risk that project outcomes are sensitive to economic influences – for example, where actual inflation differs from assumed inflation rates.	EER	1	9	9
30.	The risk that policy & legislative change increases costs. This can be divided into secondary legislative risk (for example, changes to corporate taxes) and primary legislative risk (for example, specific changes which affect a particular project).	EER	1	3	3
31.	A change in political climate at WG level.	EER	1	1	1
32.	A change in political climate at County level.	EER	1	2	3
33.	Outcome of internal decision making (i.e. Decisions made against officer recommendations).	SR	1	4	6
34.	Loss of experienced staff.	SR	6	6	9
Total			35	135	167

3.12 Summary of Appraisals

Table 29 – Summary of Appraisals

Evaluation Results	Do Nothing	Option 5	Option 6
Economic appraisals	1	2	3
Benefits appraisal	3	1	2
Risk appraisal	1	2	3
Overall Ranking	=1	=1	=3

Taking into account the combined appraisals, Option 5 ranks as the preferred option.

4 Commercial Case

4.1 Procurement Method

4.1.1 Procurement Strategy

Three procurement strategy routes were considered in Powys County Council's 21st Century Schools Strategic Outline Programme Commercial Case. Considerations included the following:

- Public/Private partnerships (including via the Mutual Investment Model);
- Joint venture with the private sector;
- Conventional procurement routes utilising framework contractors.

Consideration of these procurement routes concluded that a Joint Venture with the private sector and the Public/Private Partnerships route were unfeasible in this instance of the following reasons:

- i. There was no commitment to further commercial opportunities of significant scale that could be offered to a separate private entity. This would reduce the commercial appeal of entering into a formal partnership or joint venture with Powys County Council.
- ii. Both Private/Public Partnerships and Joint Ventures are more complex and time consuming to set up and manage. Powys only has limited major construction projects to offer, therefore it is less likely that the fixed costs involved in setting up the partnerships would be recovered through down the line savings or savings achieved through quantities of scale.
- iii. Given the scale of development required within the Council's Band A and B 21st Century Schools Programme, it is felt that the additional costs incurred by the complexities of Public/Private partnerships or a Joint Venture with the private sector will not be justified by the potential benefits from entering into these arrangements.

The Council has good experience of working with contractor frameworks and has achieved positive outcomes using such frameworks. The Council has therefore concluded that the optimum procurement route will be to use the revised SEWSCAP framework that was re-launched in June 2019 (SEWSCAP 3). The benefits of utilising contractors from this existing Contractor Frameworks list are as follows:

5. Consultation and design development can be carried out by Powys Property Design Services. The design team will then remain actively involved throughout the duration of the project, fulfilling the intelligent client role once the project is passed over to the successful contractor, thus ensuring continuity of professional staff representing PCC during all stages of the project programme.
6. Compliant with EU procurement directives and the Public Contract Regulations (2014), offering a swift route to market and opportunities for early contractor involvement;

7. The framework is free to use, offering a variety of contracts, pricing models and the potential for further savings achieved via mini-competition;
8. The new SEWSCAP Property Construction Framework is divided into the following lots:
 - Lot 1: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Powys County Council and other Potential Employers based or operating in Powys or operating nearby;
 - Lot 2: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Torfaen County Borough Council, Blaenau Gwent County Borough Council, Monmouthshire County Council, Caerphilly County Borough Council or other Potential Employers based or operating near those areas;
 - Lot 3: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Rhondda Cynon Taf County Borough Council, Merthyr Tydfil County Borough Council and Bridgend County Borough Council and any Participating Authorities based or operating near those areas
 - Lot 4: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Vale of Glamorgan Council, The County Council of the City of Cardiff Council, Newport City Council or other Potential Employers based or operating near those areas;
 - Lot 5: Provision of Construction services, extensions and refurbishment under traditional or design and build with all associated works – (£1,500,001 to £3,000,000) - Powys County Council and other Potential Employers based or operating in Powys or operating nearby to include new build
 - Lot 6: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£1,500,001 to £3,000,000) - All Potential Employers
 - Lot 7: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£3,000,001 to £5,000,000) - All Potential Employers
 - Lot 8: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£5,000,001 to £10,000,000) - All Potential Employers
 - Lot 9: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£10,000,001 to £25,000,000) - All Potential Employers
 - Lot 10: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£25,000,001 to £100,000,000) – All Potential Employers

In this instance the Council propose to use Lot 8 (£5M - £10M).

The Core principles of the framework are the over-riding objectives guiding the Authority and the Contractor in the operation of this Framework Agreement, and in entering into and performing Call-Off Contracts. The Authority and the Contractor hereby agree:

- To work together and with the Potential Employers, Employers and their advisers in good faith and in a spirit of mutual trust and co-operation;
- To act in a co-operative and collaborative manner so as to achieve and advance the relevant Construction Project;
- To share information honestly and openly; and
- To highlight any difficulties at the earliest possible opportunity.

The Authority and the Contractor agree to work together in accordance with the terms of this Framework Agreement and in co-operation and collaboration with the Potential Employers, Employers and their advisers, to achieve the successful delivery of a series of Construction Projects and in particular, the Core Principles.

4.1.2 Award methodology

Within this framework two methods may be used by Participating Authorities to award contracts under the framework, as summarised below (Direct award applies to Lots 1-7 and 11 only):

1. Mini-tender – Contractors in the relevant Lots will be invited to tender against a range of quality and pricing criteria. This method will apply to all Lots.
2. Early Contractor Involvement mini-tender - Early Contractor Involvement allows the Employer to engage with a Contractor via a contract to carry out services such as initial design, feasibility and assisting in planning and business cases etc. This process known as a 2 stage design and build requires bidders to submit an overall price for the whole of the works including the design. This will form the basis for the ECI appointment and will be discussed and refined during ECI with the aim of agreeing prices or a contract sum within the price envelope prior to the start of the construction stage.

Under this mini tendering process, the framework contractors will be asked to price scheme specific Preliminaries and Design Costs including a capped Target Cost as a guide. All other costs would be in accordance with their (already tendered) framework submission. Under the NEC4 Professional Services Contract and NEC4 Engineering & Construction Contract – Option A: Priced Contract with Activity schedule. The interim valuations will be paid on actual invoiced costs for labour, plant, materials and sub-contractors plus overheads and profit with a gain/pain percentage share on completion.

The following broad principles are to be pursued, in the area of contractor incentivisation in order to help to implement smart procurement. Their implementation is subject only to

agreement on the manner of their application in specific negotiations, and further formal consultation on appropriate contract terms and conditions:

- Making best use of competition at prime and sub-contract level to meet requirements and achieving value for money.
- Making the best use of effective pricing mechanisms to reflect the circumstances of the procurement will be used to promote incentivisation of performance.
- The Council and Industry have common objectives in trying to ensure that incentives produce demonstrable value for money (VFM) benefits for Powys and sustained shareholder value for Industry.
- Risks and rewards should be shared between the Council and Industry in an equitable manner.
- Risk should be owned by those best placed to manage it.
- The prospect of longer term commercial relationships in return for good performance should be a major spur to good performance supported by incentivisation arrangements.
- The benefits of incentivisation arrangements should apply to the sub-contract supplier base and continue to be nurtured to achieve VFM.
- Gain-sharing opportunities should be actively explored and pursued wherever possible.
- Partnering arrangements for longer term contracts must include a framework for continuing incentivisation.
- Benchmarking of performance against recognised best in class processes and practises will aid assessment of achievement against incentivisation measures.
- Sanctions for unsatisfactory performance against the contract requirement need to be available and will be used where appropriate.
- Sharing of future contract savings in subsequent contracts.

The Core principles of the framework are the over-riding objectives guiding the Authority and the Contractor in the operation of this Framework Agreement, and in entering into and performing Call-Off Contracts. The Authority and the Contractor hereby agree:

- To work together and with the Potential Employers, Employers and their advisers in good faith and in a spirit of mutual trust and co-operation.
- To act in a co-operative and collaborative manner so as to achieve and advance the relevant Construction Project.
- To share information honestly and openly; and
- To highlight any difficulties at the earliest possible opportunity.

4.2 Required Services

4.2.1 The required service streams:

The required service streams for this programme business case include:

- A new 4-11 dual stream Primary school (150 capacity, plus early years) in Sennybridge.

4.2.2 The specification of required outputs:

- CO2 or energy arising from site activities as deemed required by the contractor to achieve BREEAM Excellent;
- CO2 or energy arising from transport to and from site as deemed required by the contractor to achieve BREEAM Excellent;
- Water consumption arising from site activities as deemed required by the contractor to achieve BREEAM Excellent;
- Air (dust) pollution arising from the site as deemed required by the contractor to achieve BREEAM Excellent;
- Water (ground and surface) pollution occurring on the site as deemed required by the contractor to achieve BREEAM Excellent;
- 80% of site timber is responsibly sourced and 100% is legally sourced;
- Net Zero Carbon building.

4.3 Potential for Risk Transfer.

Table 30 – Risk category

Risk Category	Potential allocation		
	Public	Private	Shared
Design risk			✓
Construction and development risk		✓	
Transition and implementation risk			✓
Availability and performance risk		✓	
Operating risk	✓		
Variability of revenue risks	✓		
Termination risks		✓	
Technology and obsolescence risks	✓		
Control risks	✓		
Residual value risks	✓		
Financing risks	✓		
Legislative risks			✓
Other project risks			✓

4.4 Project Bank Accounts (PBAs)

Details around the approach to PBAs will be developed as this proposal moves through the various approval gates. This will include details of:

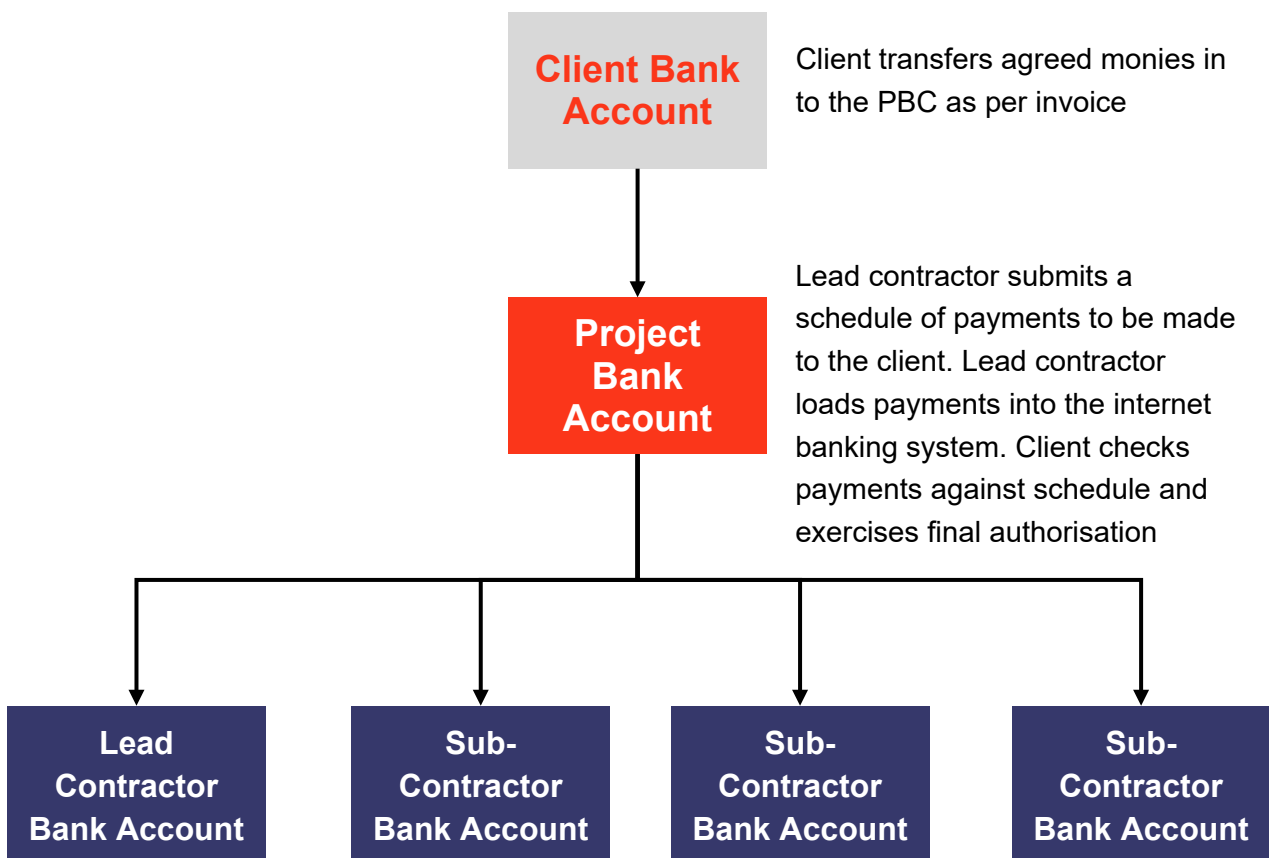
- Who will approve the PBA documentation and how? For example, who will approve and sign the Deeds of Trust, Deeds of Adherence / Joining Deed, Bank Mandate.
- Who will agree payments due to the lead contractor and each of their named suppliers and how?
- Who will be responsible for paying money into the PBA and authorising payments out?
- Who will agree why certain supply chain members may not be paid directly from the PBA and the criteria this will be based upon?

It is important that the benefits of PBAs are understood and prospective tenderers understand that they should communicate these benefits down the supply chain, to maximise sub-contractor sign up to the PBA.

To support this, a briefing pack and information sheet for tenderers outlining both the benefits and requirements of using a PBA.

Additionally, at tender stage, the procuring party will include clauses in the ITT documentation, referencing the use of PBAs. These clauses will include specific requirements on how the PBA will operate.

Figure 4: PBA money route



4.5 Community Benefits

4.5.1 Agreed schedule

The inclusion of community benefits/social requirements within contracts will ensure that wider social and economic issues are taken into account when tendering construction and development work. The Council particularly considers that the works afford an ideal opportunity to the contractor to enhance employment prospects and skills through the recruitment, training and retention of economically inactive people at a disadvantage in the labour market.

4.5.2 Delivery of agreed targets

Based on previous experience, for a project of this value, we anticipate that the successful contractor would:

- Deliver a Meet the Buyer Event to raise awareness of project to local supply chain;
- Use Sell2Wales to advertise opportunities;
- Complete 100% payments to sub-contractors within 23 days of receipt of invoice;
- Utilise and complete the Value Wales Measurement Tool;
- Provide weeks of employment (to be decided); training and/or work experience opportunities for unemployed people, those leaving and educational establishment or training provider; trainee's or apprentices;
- Employee apprentices on the project (numbers to be decided as the scheme develops);
- Conduct a number of pupil interactions;
- Spend a % of contract spend in Wales;
- Divert a % of waste from landfill; and
- Conduct a number of community initiatives throughout the duration of the project.

5 Financial Case

5.1 Project Summary Costs

Table 31 – Key metrics

Project Title and Location	New Build Primary school, Sennybridge
New Build % (Area)	1,444 sq. Metres
Refurbishment % (Area)	N/A
Extension % (Area)	N/A
Description of work & any unusual constraints	N/A
# Pupil Places	150
# SEN Places	0
Total # Places	150
# Storeys (including basement)	1
Delivered through Regional Framework?	Yes
Contract period in weeks	117 Weeks
Anticipated Community Benefits	Subject to the outcome of procurement
# Trainee and apprenticeship opportunities	Subject to the outcome of procurement
Use of local subcontractors as a % of total cost	Subject to the outcome of procurement








5.2 Breakdown of Capital Costs

Table 32 – Breakdown of capital costs

Project Costs	
Capital Cost	£9,074,723
Optimism Bias	£1,353,640
Risk	£725,978
VAT (only to be included where non-recoverable by applicant)	N/A
Total Project Cost (inclusive of optimism bias and risk)	£11,154,341
Total funded (It is assumed that optimism bias and risk will be fully mitigated and that the capital build cost is the actual cost upon which the intervention rate will apply.)	£5,898,570
Welsh Government Intervention Rate	65%

5.3 Cost Template

Table 33 – RIBA Stage Cost Breakdown

Summary Page	1 	2 	3 	4 	5 	6 	7 
	Preparation and Brief	Concept Design	Spatial Coordination	Technical Design	Manufacturing & Construction	Handover	Use
Stage Total	£32,135.20	£176,138.73	£231,426.80	£227,833.07	£7,888,017.93	£277,431.16	£241,741.46
PDS / HoWPS Fees	£8,602.00	£88,357.00	£65,526.80	£33,733.07	£153,096.23	£17,299.01	£28,609.31
Other Consultant Fees	£13,100.00	£68,492.36	£5,900.00	£24,100.00	£5,900.00	£2,000.00	£0.00
Survey Costs	£10,433.20	£19,188.87	£0.00	£0.00	£0.00	£0.00	£0.00
Main Contract	£0.00	£0.00	£150,000.00	£150,000.00	£7,109,021.70	£208,132.15	£208,132.15
Other Orders	£0.00	£100.50	£10,000.00	£20,000.00	£620,000.00	£50,000.00	£5,000.00
Total Estimated Project Cost							£9,074,724.34

5.4 Cost Build Up

Table 34 – Cost build up (extract)

£'000s	Total Cost	Years (years 10-59 same as year 9 except lifecycle detailed below)									
		0	1	2	3	4	5	6	7	8	9
		2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32
CAPITAL COSTS											
Initial Capital Costs	£9.075	£0.738	£3.603	£3.861	£0.873	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Lifecycle Cost	£5.263	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.075	£0.000
Capital Cost Total	£14.338	£0.738	£3.603	£3.861	£0.873	£0.000	£0.000	£0.000	£0.000	£0.075	£0.000
REVENUE COSTS											
Salaries/ Building Costs	£33.492	£0.546	£0.546	£0.546	£0.554	£0.559	£0.559	£0.559	£0.559	£0.559	£0.559
Revenue/Current Costs Total	£33.492	£0.546	£0.546	£0.546	£0.554	£0.559	£0.559	£0.559	£0.559	£0.559	£0.559
Total Costs	£50,160	£1.284	£4.149	£4.407	£1.427	£0.559	£0.559	£0.559	£0.559	£0.634	£0.559
BENEFITS											
Capital Receipts	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Benefits	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Benefits Total	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Cost Net Cash Savings	£47.830	£1.284	£4.149	£4.407	£1.427	£0.559	£0.559	£0.559	£0.559	£0.634	£0.559
Total	£47.830	£1.284	£4.149	£4.407	£1.427	£0.559	£0.559	£0.559	£0.559	£0.634	£0.559

Lifecycle profile:

Y13 – £110k, Y18 – £983k, Y23 – £391k, Y28 – £191k, Y33 – £723k, Y28 – £191k, Y33 – £723k, Y38 – £75k, Y43 – £1,432m, Y48 – £983k, Y53 – £226k, Y58 – £75k.

Full table is produced in the spreadsheet appended to the business case.

5.5 Impact on the Organisation's income and expenditure account

Table 35 – Impact on the organisation's income and expenditure account (extract)

£'000s	Total Cost	Years (years 8-60 same as year 7)									
		0	1	2	3	4	5	6	7	8	9
		2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2022/23
Preferred way forward:											
New Build Capital	9.075	£0.738	£3.603	£3.861	£0.873	0.000	0.000	0.000	0.000	0.000	0.000
Other Capital Costs (including lifecycle)	5.263	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.075	0.000
Revenue/Current Cost	33.492	0.546	0.546	0.546	0.554	0.559	0.559	0.559	0.559	0.559	0.559
Cash Releasing Benefits	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
Total	47.830	1.284	4.149	£4.407	£1.427	£0.559	£0.559	£0.559	£0.559	£0.634	£0.559
Funded by:											
Existing Revenue	-32.772	-0.546	-0.546	-0.546	-0.546	-0.546	-0.546	-0.546	-0.546	-0.546	-0.546
Total Existing	-32.772	-0.546	-0.546	-0.546	-0.546	-0.546	-0.546	-0.546	-0.546	-0.546	-0.546
Additional Funding Required	15.058	0.738	3.603	3.861	0.881	0.013	0.013	0.013	0.013	0.013	0.013
Cumulative Funding		0.738	4.341	8.202	9.083	9.096	9.109	9.122	9.135	9.222	9.235

Full table is produced in the spreadsheet appended to the business case.

5.6 Overall Affordability and Balance Sheet Impact

A balance sheet asset addition of £9,074,723 is made for the new build school. Short term additional funding is required of the full £7,242,610 for years 0 through 3 (inclusive), excluding VAT, retained risks and optimism bias. From the opening of the new school building in 2025 there will be a small increase in the recurring revenue cost of school, at approximately 13K per annum.

The Band B submission has been scrutinised and assessed by the Council's Section 151 Officer for affordability in light of the 65% programme intervention rate. The Council will meet the 35% contribution required to support the project through prudential borrowing.

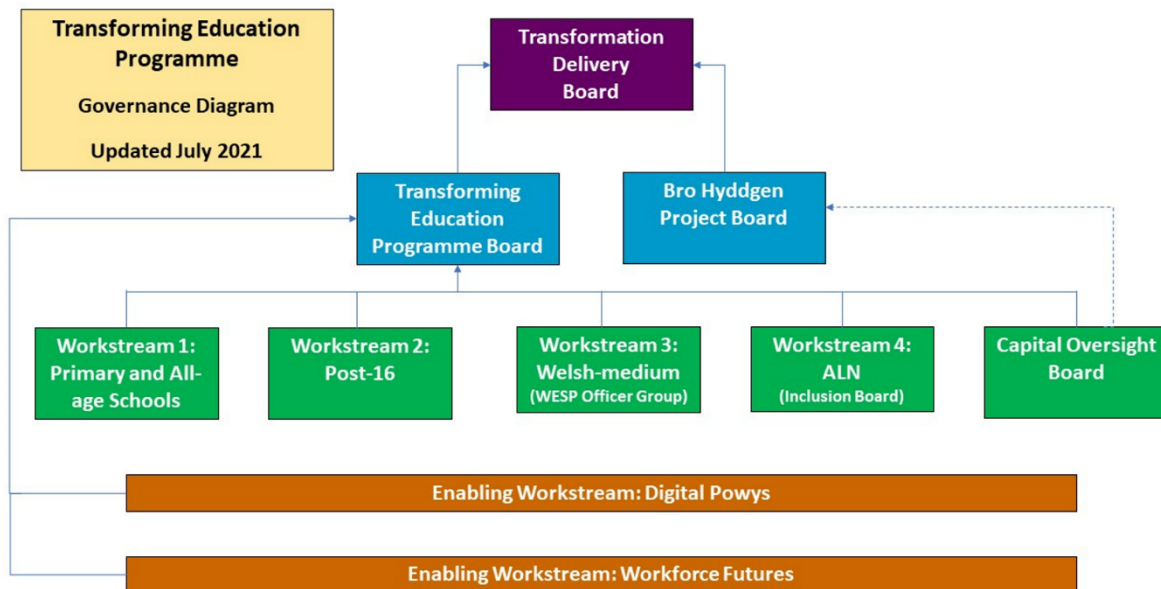
6 Management Case

6.1 Programme Management Arrangements

This scheme is a constituent of Powys County Council’s Transforming Education Programme, and has been identified within that Programme as a priority. It will be managed in accordance with best practice in programme and project management principles – MSP and PRINCE2 to provide a systematic and effective delivery framework.

Overall corporate governance for the Transforming Education Programme is in accordance with the governance arrangements for the Council’s Transformation Programmes.

Figure 5: Transforming Education Programme Governance



6.2 Project Management Arrangements

The reporting and governance arrangements for this project are as follows:

- Project Team, via the Client Lead, prepare monthly highlight reports to the Programme Manager and Service Manager.
- The Service Manager Transforming Education presents summary reports to the Transforming Education Programme Board and Schools Capital Oversight Board meetings on a monthly basis.
- On an exception basis only, the Project Team will report key strategic risks and issues to Programme Board for resolution.

6.2.1 Project Structure

The project will be managed in accordance with the general principles of MSP/PRINCE2 methodology.

The Project Team will remain actively involved throughout the duration of the project fulfilling the intelligent client role once the project is passed over to the successful contractor, thus ensuring continuity of professional staff representing Powys CC during all stages of the project programme.

Figure 6: Project Structure

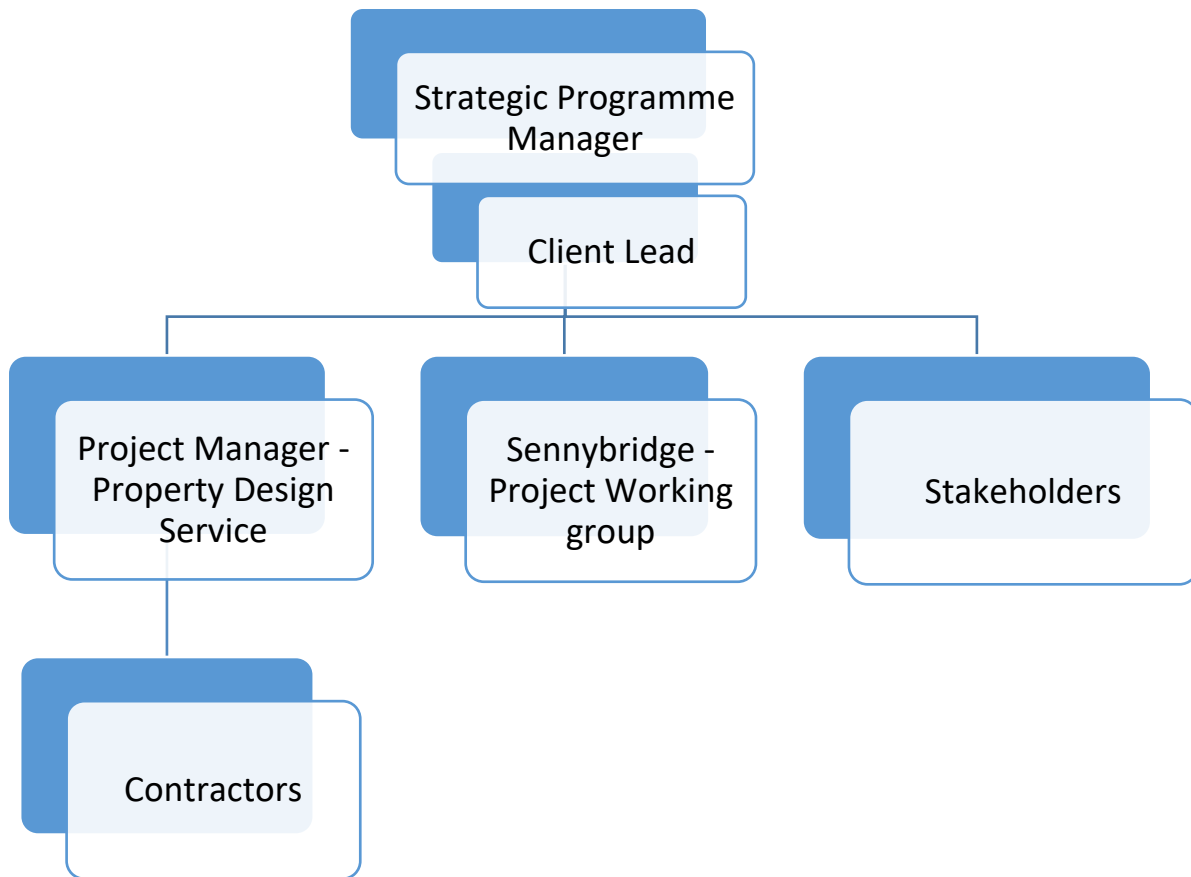


Table 36 – Project team

Name	Project Role
Melanie Price	Client Lead
Calvin Williams	Project Manager Property Design Service
Jim Swabey	Professional Lead, Property Design Service
Amy Jones	Finance Lead (Revenue)
Ashley Bennett	Head Teacher
James Chappelle	Finance Lead (Capital)
Gary Leatherland	Procurement Specialist
Lee Evans	Communications Team Manager

6.2.2 Outline Project Plan

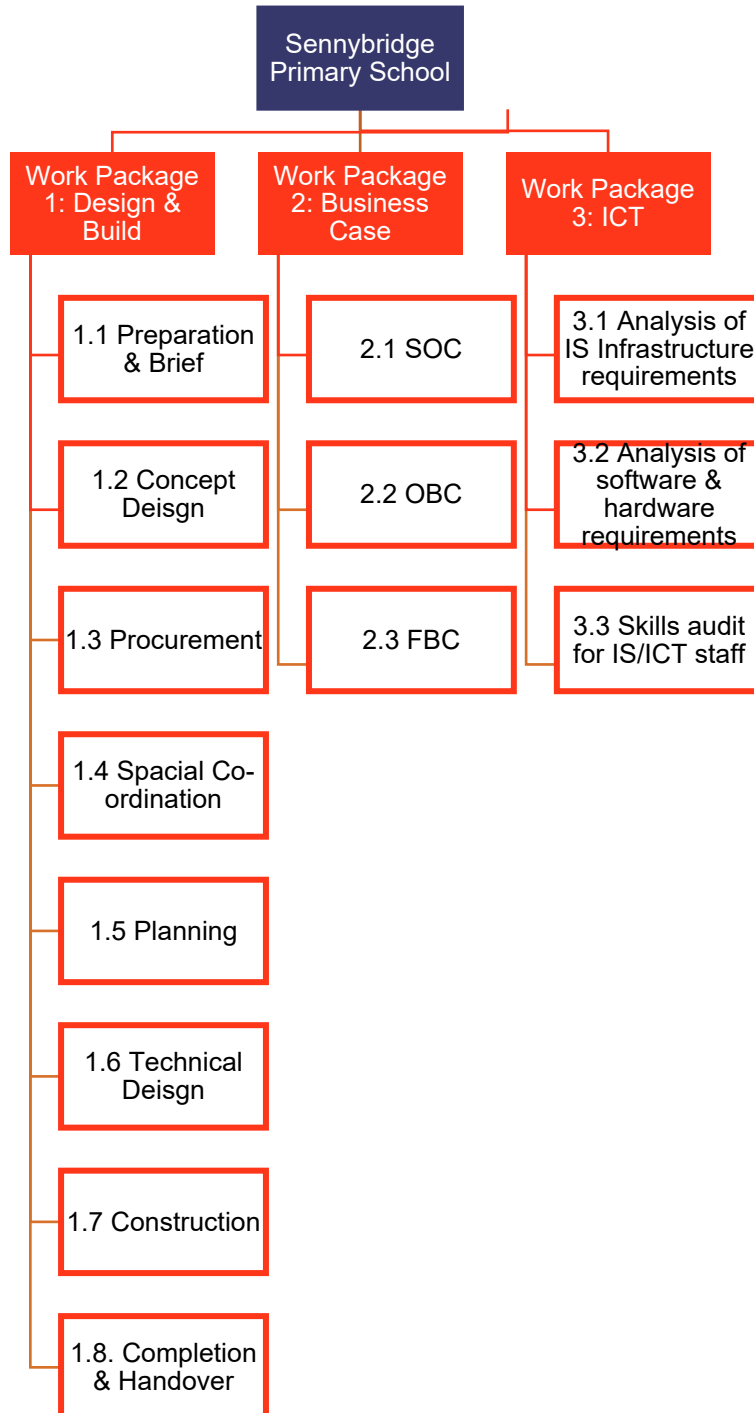
Table 37 – Outline project plan

Date	Actions (commencement)
09/10 2022	OBC approvals
10/2023	Commence Procurement for a Design & Build contractor
11/2023	Planning Application
01/2024	Planning Approval Contract Award
02/2024	RIBA 4 Completed
02/03 2024	FBC approvals
05/2024	Commence Construction

6.2.3 Project Deliverables

The following product breakdown structure depicts the structure of the project:

Figure 7: Product breakdown



6.2.4 Benefits Realisation

An example of the project benefits register is included in the table below. This table describes who is responsible for the delivery of specific benefits, how and when they will be delivered and the required counter measures, as required.

Table 38 – Proposed Benefits Realisation Plan Structure

Benefit	Owner	Target	Method of measurement	Responsibility for	Timing of measurement	Outcome

6.3 Risk Management

All project risks are managed via the Council’s JCAD risk management system.

JCAD is a ‘living document’ and reviewed and amended (where required) during Project Team meetings or risk workshops where the Team manage the identification, monitoring, updating, control and mitigation of project risks. The framework and plan of the risk register involves a rated table format. The risk is described and the date of its identification noted. An initial risk rating is made and the probability and impact of the risk evaluated, followed by a residual risk rating column. The effects and impact of risk can involve elements such as environment, time, quality, cost, resource, function or safety and regular meetings will be held to review all aspects. Within the format there will also be the facility for proposals to mitigate and manage, identifying the control strategy, risk owner and the current risk status.

The risks and issues identified within this project will be cross referenced with the risks/issues held by the Programme Board so that cross cutting issues can be mitigated safely.

The total risk score for each risk will be calculated by multiplying the probability score (between 1-4 with 4 being certain) and impact score (between 1-4 with 4 being project failure) and all risks scoring 16 and above will be referred to the Programme Board for decision. The risk tolerance line for the project is illustrated in the following table.

6.4 Change and Contract Management

The main aim here is to manage proposed changes to the culture, systems, processes and people working to establish the best option for the council. Change management is not about the provision of the best option but instead focuses on those actions that are necessary to make the best option a working success.

Managers responsible for the key areas will adopt appropriate project management disciplines to meet specific responsibilities. The individual activities may be projects in their own right or be work streams within the overall project.

Planning has been developed for all activities within this change management process through the identification of key outcomes and actions required to ensure successful delivery. Timescales for carrying out such actions, the resources required, and where required, the need for additional resources, have also been determined.

6.5 Gateway Reviews

The Council confirm that it is prepared to complete a Gateway review of the programme at Welsh Government convenience. Further Gateway reviews may then be undertaken during the remaining life of the programme.

6.6 Post Project Evaluation

The outline arrangements for Post Implementation Review (PIR) and Project Evaluation Review (PER) have been established in accordance with best practice and are as follows.

6.6.1 Post Implementation Review (PIR)

These reviews ascertain whether the anticipated benefits have been delivered and are timed to take place a year post construction, i.e. January 2026.

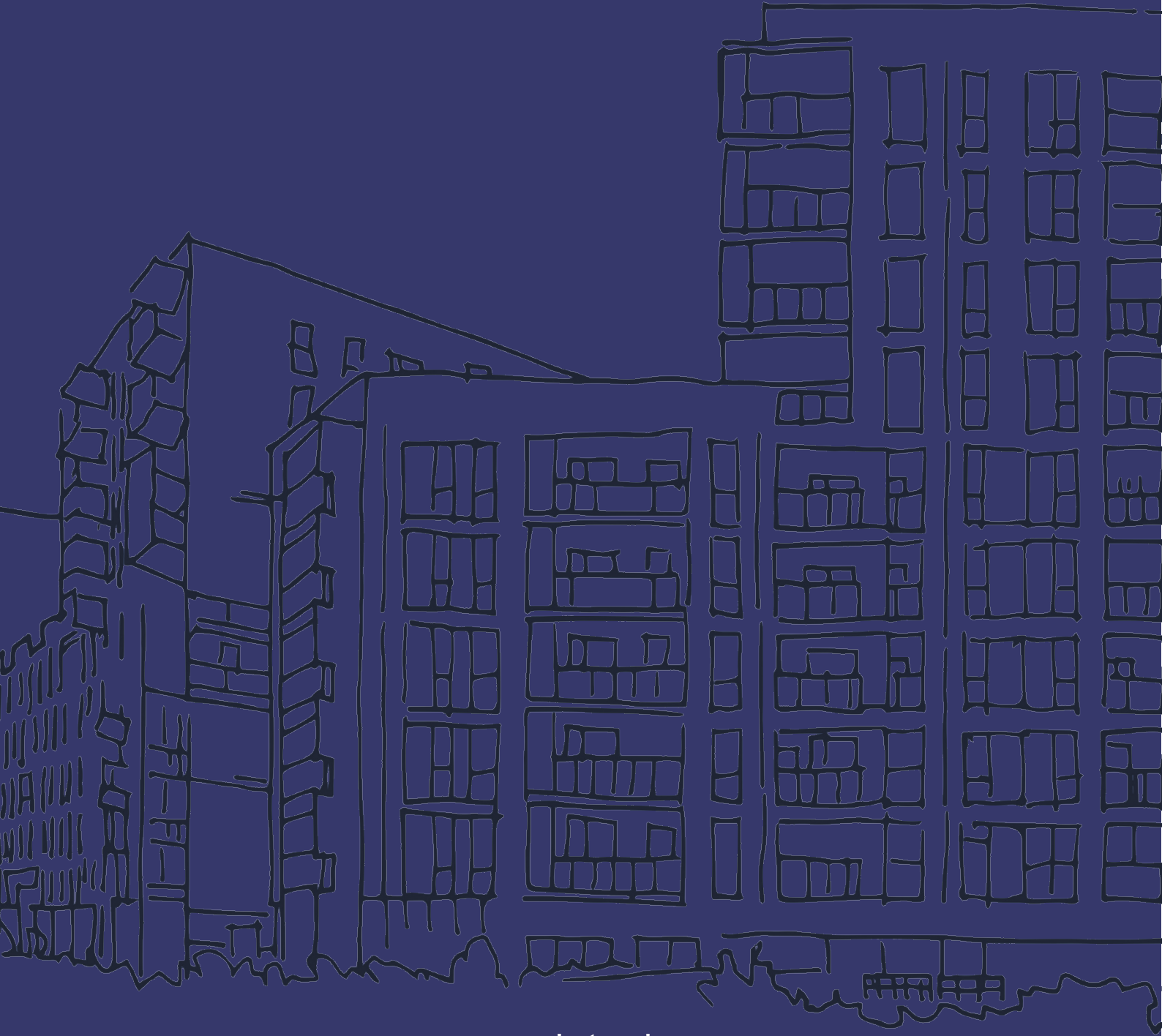
6.6.2 Project Evaluation Reviews (PERs)

PERs appraise how well the project was managed and delivered compared with expectations and are timed to take place one-year post construction, i.e. January 2026.

6.7 Contingency Plans

In the event of project failure, the existing schools will continue to operate until such time that the project can be righted.

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