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The Outline Business Case for the New Haltwhistle Primary Academy for WISE Academies



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Document Properties	
Document Owner	Phillip Blythe
Organisation	NORR
Title	Haltwhistle Primary Outline Business Case

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Glossary of Terms

Term	Definition
BB103	Building Bulletin 103 - Area Guidelines for Mainstream Schools
CDM	Construction Design & Management
DFE	Department for Education
FBC	Final Business Case
FE	Form Entry
FF&E	Furniture, Fixtures and Equipment
H&S	Health & Safety
LA	Local Authority
NCC	Northumberland County Council
OBC	Outline Business Case
PAN	Published Admission Number
PSBP	Priority Schools Building Programme
SEN	Special Educational Needs
WA	Wise Academies
SoA	Schedule of Accommodation

EXECUTIVE SUMMARY

This document outlines the options appraisal, cost estimates, affordability assessment and procurement strategy carried out in relation to the proposal to provide the new Haltwhistle Primary Academy. The new school would be located on the existing First & Middle School site. Sufficient detail is included to allow capital funding to be confirmed and for approval to be sought from Cabinet for the implementation and delivery of the preferred scheme.

1 Overview and commitment

Section 1 and **Appendix 1** of this Outline Business Case describe the scheme and confirm the commitment of all parties to the project.

The preferred scheme supports the objectives set out in Northumberland County Council's vision for Northumberland's residents. WISE Academies has a strong track record of providing high quality education for its pupils; the provision of a fit-for-purpose learning environment at Haltwhistle will further strengthen provision for children and young people, and have a positive impact on outcomes.

The need to redevelop the existing middle school site is the result of extending the age range of pupils attending the first school, clearly supporting the local authority's proposals for education in this area.

WISE Academies have demonstrated their commitment to the project since acquiring the schools in September 2018; the consultation process and its necessary consents have been obtained to close the middle and extend the age range of the first school, and the preparation of the OBC has been funded entirely by WISE.

After carrying out a site option appraisal, only one option has proved feasible – to redevelop the middle school site.

The local authority has indicated their support for this proposal, and will obtain the land surrendered by WISE Academies upon completion of the scheme. The local authority and WISE will continue to work closely together to ensure the project is delivered within the agreed timescales.

As well as improving learning and teaching environments for current and future children of Haltwhistle, the on-site community use and sports facilities will also benefit the wider Haltwhistle community. Any redevelopment of the surplus land by the local authority will also bring wider community benefits.

The local Children's Centre would benefit from being relocated onto the Trust's site from their current temporary home. The preferred solution of NCC costs approximately £200 000.

Pupil place planning demonstrates the current capacity for pupils in the new Haltwhistle Primary will be adequate for current and future needs.

Combining education provision in one building on the site will secure the school's long term educational and financial viability.

WISE Academies will make a financial contribution of £153 557 to ensure the financial viability of the scheme.

The timeline for the delivery is for the school to open on-site on 1st September 2020.

2 Procurement Strategy

Section 2 and **Appendix 2** of this OBC describe the Procurement Strategy for the whole scheme.

Following a review of procurement options available for construction projects, it is recommended that the development is procured through a Traditional strategy utilising a RIBA Stage 4 detailed design prior to tender issue.

It is further recommended that contractors are engaged through an OJEU compliant Framework as this offers a more expedient route to market to enable WISE Academies to achieve a challenging, but achievable, programme. It will also ensure that a contractor with the relevant experience is appointed.

Procurement Programme

The programme for procurement assumes the following;

- Commencement of RIBA Stage 3/4 designs on 02 Sep 2019
- Submit for planning (if required) on 16 September 2019
- Completion of RIBA Stage 3/4 designs on 25 October 2019
- Issue tender documents on 08 November 2019
- Tender return on 20 December 2019
- Contractor appointment on 27 January 2020

Construction Programme

- Construction commences on site 17 February 2020
- Construction complete; 14 August 2020

3 Site Options

Section 3 and **Appendix 3** of this Outline Business Case describe the options appraisal undertaken to which contribute to the design and construction works of a preferred option.

This section outlines the initial option analysis for the provision of the Primary School on the existing site.

From review of the options with the Academy and School it was felt that given the financial & programme constraints and the issues with the existing First School that the only feasible option would be to remodel the existing Middle School.

The Options Appraisal for the Children's Centre has been carried out and NCC feel Option 5 is the only feasible solution for the Children's Centre.

4 Design and Construction

Section 4 and **Appendix 4** of the Outline Business Case describe the further development of Option 3 – Middle School Remodel & Refurbishment to demonstrate feasibility.

The feasibility study has taken into account WISE Academies' educational brief, site factors and budget constraints in determining the appropriate proposal. It has also been cognisant of potential planning, highways and Sport England input moving forward.

The minimal external elements of the works have limited the impact of future surveys due to the short timescale.

It is therefore considered that the feasibility study demonstrates the viability of relocating the first school and additional Year 5&6 pupils to utilise the existing middle school building to create the necessary new primary school. It also provides a sound basis for the completion of the design as indicated by the developed drawings prepared in conjunction with the Trust.

5 Commercial Appraisal

Section 5 and **Appendix 5** of this Outline Business Case describe the commercial appraisal for the options available for the scheme.

The preferred option (option 3) is to refurbish and remodel the existing middle school building into a new primary school.

This option negates the requirement of building or to extending on site with a loss of playing space and potential complications with Sport England. It also represents the most affordable viability at just over £2.65m and includes £200,000.00 for the Children's Centre works.

WISE Academies will contribute £153,557 in support of the above. Additional contributions, over and above the £153,557, will be provided to purchase new FFE and ICT equipment.

WISE Academies have also confirmed that they will use their CIF funding allocation in future years to undertake condition improvements to the non-teaching part of the school.

6 Readiness to Deliver

Section 6 of the Outline Business Case sets out the Local Authority's project management structure and identifies the roles and responsibilities of each part of the structure. The key members of the team and the external advisers are named, and information is provided on their skills, experience and time commitment to the project. This section also sets out the approved budgets (including consultant advisory fees) and the delegated authorities given to a named senior officer within the key stakeholders.

Northumberland County Council has put in place resources for the duration of the project, including post contract, to monitor and maintain ongoing relations between the Northumberland County Council and WISE Academies to ensure the effective delivery of the project, throughout its lifetime.

A procurement exercise will be required to be undertaken by the Authority to appoint a full multi-disciplinary design team in readiness for the approval of the OBC.

A risk workshop will be held, and a risk strategy developed early in the next stage of the programme.

7 Moving Forward

Section 7 of the Outline Business Case sets out the proposed recommended approach for the procurement should approval for the scheme be given by Northumberland County Council's Cabinet.

A critical path of scheduled delivery activities has been provided based on the proposed route to market, Traditional Single Stage Procurement, and in line with the Public Contracts Regulations [PCR] 2015.

The design team will need to be appointed immediately on approval of the OBC for the key milestones to be achieved. The design process will progress on such appointment and will need to be at RIBA 4 / tender issue level by the end of October 2019.

Designs will be monitored throughout the design stages to control cost ensuring the scheme remains within budget and various surveys and investigations will be undertaken to help reduce unknowns and therefore minimise risk.

An OJEU compliant framework will be sourced in conjunction with NCC Procurement to maintain programme and to ensure the best route is chosen.

1 OVERVIEW AND COMMITMENT

Section 1 and **Appendix 1** of this Outline Business Case describe the scheme and confirm the commitment of all parties to the project.

1.1 The Corporate Vision

Northumberland County Council (NCC) has set out its vision for the County in its Corporate Plan 2018-2021. The principles are focussed on ensuring each resident:

- Feels safe, valued and part of their community;
- Lives in distinctive vibrant places, which they value and in which they feel proud;
- Can easily get to work, to learning, and to the various facilities and services they want to use; and
- Regardless of age, has the right of qualifications and skills to secure a good job that pays well and provides the prospect of a rewarding career.

The provision of fit-for-purpose educational facilities for the 21st century for children and young people in Northumberland is a key building block in achieving this vision.

1.2 Strategic Overview

1.2.1 Countrywide Strategy

Based in the Education Vision, Northumberland's countywide strategy for education is articulated within the Service Director's Annual report 2018.

1.2.2 Project Overview

Haltwhistle First Academy and Haltwhistle Middle Academy became part of WISE Academies from 1st September 2018.

WISE Academies were fully aware of the Northumberland County Council's earlier consultation that had taken place prior to the re-brokerage of the Haltwhistle academies. The Local Authority's plan for schools in the area is to move to a two-tier school system (Primary, Secondary) replacing the three-tier system (First, Middle, High). This had historically existed throughout the area but had gradually seen changes implemented over the years resulting in a mixture of primary and first/middle schools operating alongside each other.

WISE Academies was therefore fully aware that the organisation of school provision on the Haltwhistle site was something that would need to be addressed in the context of the Local Authority's strategic plan for the area.

WISE Academies has a mission to promote high educational standards, to ensure fair access to educational opportunity and promote the fulfilment of every child's educational potential.

Taking account of the level of surplus capacity in the school, the impact of the Local Authority's consultation which would see all remaining first schools in the area becoming primary schools, the need for significant investment in the school buildings and the financial position of the Haltwhistle academies, it was concluded that the Middle Academy was not viable. Instead it was decided that future provision should be secured on the Haltwhistle site

by creating a high quality primary establishment by extending the upper age range of the First Academy from age 9 to age 11.

WISE Academies then embarked on a consultation process (see section 1.2.4) in relation to the proposed primary school.

While carrying out the consultations, the Trust also held a series of meetings with NCC officials to plan for the various eventualities of the consultation process. NCC officials instructed WISE to develop an Outline Business Case (OBC) in order to establish a preferred scheme and develop a robust project budget to enable the creation of suitable primary provision on the existing site. NCC made it clear there was no appropriate alternative site and the only suitable option was to redevelop existing provision on the site.

The current site will be oversized for the operation of a primary school. The Trust and representatives from NCC have developed proposals whereby WISE Academies would relinquish its lease of a large proportion of the site, which would then return to local authority control. The local authority would then redevelop this proportion of the site for wider community benefit. The Trust would then operate primary education from the remainder of the site, including the provision of wider community and sporting facilities. A Children's Centre will also continue to operate on the site.

This proposed business case therefore seeks to develop the preferred option of middle school redevelopment by 1st September 2020. As part of the options appraisal, redeveloping the first school site has been ruled out, as is the proposal to provide a new-build solution on the site. Doing nothing, and operating across the two sites, has also been considered and dismissed as an option.

This OBC sets out the work undertaken to establish the feasibility and affordability of this proposal. The high level costs for this option are set out in Section 5.

1.2.3 Strategy and Objectives

As stated above, the rationale for the initiation of this project has been founded on WISE's desire to support the LA's proposals for the west of Northumberland, and in doing so provide high quality primary education on the current site. The Trust were faced with the need for significant capital investment in the school estate in order to ensure the buildings were fit for purpose and meet the needs of children aged 3-11.

This project would improve the learning and teaching environment for the current and future pupils in the school, and in doing so provide on-site sporting and community facilities that would also benefit the Haltwhistle community as a whole.

The objectives of this proposal are to:

- Provide good quality, modern teaching and learning environments of pupils attending Haltwhistle Academy,
- Enable the increased age range of Haltwhistle First School to be achieved without compromising the education of other children attending the school.
- Support WISE Academies in providing a financially and educationally secure future for the school through its location on one site,
- Consider possible options for the relocation of the existing Children's Centre within

- the scheme,
- Surrender surplus area on the site for the local authority to redevelop for wider community benefit.

1.2.4 Stakeholder Consultations

In Autumn 2018 WISE Academies proposed a single primary school serving the Haltwhistle communities be established on the most appropriate site, in line with the Northumberland strategy for change and timescales. Trustees of WISE Academies took the decision to formally consult on this proposal and a period of consultation took place from October to December 2018.

Feedback from the consultation exercise demonstrated strong support for a primary academy to be established with a recognition that the proposal had the potential to bring new facilities and benefit the education and outcomes of pupils.

The Trust then applied to the Secretary of State requesting formal closure of the middle school, alongside an application to extend the age range of the first school. This was considered by the Regional School's Commissioner (RSC) and received approval, subject to Secretary of State consent, on 30th January 2019. A further listening period was carried out between 21st March 2019 and 17th May 2019. No objections were made during this period. Following this, the formal consents have been received by the Secretary of State in July 2019.

1.2.5 Pupil Place Planning

The school will have approximately 246 children in Reception – Y6 in September 2019. An additional 30 children will attend Nursery. Part of the rationale to close the middle school was around declining pupil numbers. There has been a decline in pupil numbers at the Middle Academy over a number of years and that decline is projected to continue, particularly in view of the change in surrounding schools from first schools to primary schools which will mean that children remain in their current settings instead of transferring to middle schools at Year 5.

Pupil numbers vary across school. The school has a PAN of 40, which is appropriate for both current and projected pupil numbers. The school will operate on a typical one and a half form teacher model. The building is therefore fit for purpose on current pupil numbers, while also being future-proof as far as it's possible to predict.

1.3 Preferred Scheme

As stated in the earlier sections, feedback from the consultation process was strongly in support of the establishment of a primary school on the current site. Since this time, NCC and WISE Academies have been working together to develop the scope and options for project delivery. As a result of these many months of work, WISE Academies Trustees support the vision of providing primary provision in one building as they believe this is the only way to provide sustainable primary provision in the area, ensuring the school is both educationally and financially secure.

The objectives of the proposed project would enable WISE to run a financially viable school at the heart of the local community. The provision would be fit for purpose, meeting the needs

of all pupils in the extended age range. Savings from operating on both sites would then be reinvested in curriculum delivery and widening educational opportunities.

NCC have asked the Trust to look into the possibility of providing Children’s Centre accommodation as part of the proposal. This has been provided as part of an options appraisal. The County Council’s preferred solution, locating the Children’s Centre in the gymnasium has been drawn by the architects and costed by F&G.

The initial concept has the support of both Wayne Daley and Guy Opperman among others as it is deemed to meet both the educational requirements of the children in Haltwhistle while also allowing the local authority the opportunity to acquire and develop surplus land for wider community benefit.

The preferred scheme detailed within this OBC is a result of evaluating the Education Brief, the site options appraisal, and the viability of surplus land available for NCC.

1.3.1 Timeline

The proposed timeline for the project is indicated below.

Outline Business Case	Submit Outline Business Case	15 Jul 2019
	Outline Business Case Approved	06 Sep 2019
RIBA 3 and 4 Designs	RIBA 3/4 commencement	02 Sep 2019
	Submit for planning (if required)	16 Sep 2019
	RIBA 3/4 completion	25 Oct 2019
	RIBA 3/4 client sign off	01 Nov 2019
Tender process	Issue tender documents	08 Nov 2019
	Final tenders returned (6 weeks)	20 Dec 2019
	Tender review and report (1 week)	10 Jan 2020
Final Business Case (if required)	Submit final business case	13 Jan 2020
	NCC approval of FBC	24 Jan 2020
	Award contract	27 Jan 2020
Construction	Contract finalisation	27 Jan 2020
	Construction commences on site	17 Feb 2020
	Construction complete on site	14 Aug 2020
	Completion of commissioning	07 Aug 2020
	Decanting complete	28 Aug 2020
	School opens	01 Sep 2020

1.3.2 Accommodation

The accommodation schedule for the feasibility study has been compiled on the basis of the standard ESFA PSBP accommodation schedule pro forma. Area comparisons were also done with BB103 min. areas but it was felt that the PSBP schedule was more comprehensive & prescriptive as a base line for the school to take and refine to their pedagogy.

Converting a younger age group school such as the First School to include an older age group or conversely an older age group school such as the existing Middle School to a younger age group Primary inevitably leads to inadequate size/ additional provision that you would not anticipate. In the case of the First School an undersized Hall and lack of practical space and in the Middle School an oversized Main Hall (incl. Stage)/ Kitchen and the large Gym with changing facilities. Under sized spaces are difficult to remodel to a larger size with the correct proportion (e.g. the Hall) neither are convoluted building shapes which the First School is also. The additional types of spaces within the Middle School do not lend themselves to being remodelled but retained in their original function as not only an additional benefit for the school but a retained community resource. However the teaching accommodation can successfully be remodelled to facilitate the school's needs. We estimate the area within the existing First School to be 90% under and the Middle School to be 45% over that required for a new build 1.5FE school with 39 place Nursery. The PSBP Schedule of Accommodation can be found in Appendix 1E.

1.3.3 Academy and Local Authority Commitment

WISE Academies have worked closely with NCC in order to progress this OBC. The Trust have demonstrated their commitment through both the completion of OBC at risk, and through being prepared to make a contribution of £153 557 to the overall scheme.

The legal commitment of each party throughout the process of the project will be agreed prior to the commencement of the procurement programme through the form of a Memorandum of Understanding.

1.4 Summary

The preferred scheme supports the objectives set out in Northumberland County Council's vision for Northumberland's residents. WISE Academies has a strong track record of providing high quality education for its pupils; the provision of a fit-for-purpose learning environment at Haltwhistle will further strengthen provision for children and young people, and have a positive impact on outcomes.

The need to redevelop the existing middle school site is the result of extending the age range of pupils attending the first school, clearly supporting the local authority's proposals for education in this area.

WISE Academies have demonstrated their commitment to the project since acquiring the schools in September 2018; the consultation process and its necessary consents have been obtained to close the middle and extend the age range of the first school, and the preparation of the OBC has been funded entirely by WISE.

After carrying out a site option appraisal, only one option has proved feasible – to redevelop the middle school site.

The local authority has indicated their support for this proposal, and will obtain the land surrendered by WISE Academies upon completion of the scheme. The local authority and WISE will continue to work closely together to ensure the project is delivered within the agreed timescales.

As well as improving learning and teaching environments for current and future children of Haltwhistle, the on-site community use and sports facilities will also benefit the wider Haltwhistle community. Any redevelopment of the surplus land by the local authority will also bring wider community benefits.

The local Children's Centre would benefit from being relocated onto the Trust's site from their current temporary home. The preferred solution of NCC costs approximately £200 000.

Pupil place planning demonstrates the current capacity for pupils in the new Haltwhistle Primary will be adequate for current and future needs.

Combining education provision in one building on the site will secure the school's long term educational and financial viability.

WISE Academies will make a financial contribution of £153 557 to ensure the financial viability of the scheme.

The timeline for the delivery is for the school to open on-site on 1st September 2020.

2 PROCUREMENT STRATEGY

Section 2 and **Appendix 2** of this OBC describe the Procurement Strategy for the whole scheme.

This section of the Outline Business Case outlines how the overall scheme will be procured given the information and time constraints available.

2.1 Procurement Option

A Procurement Report has been developed at Appendix 2A which considers the following four procurement options;

- Traditional;
- Design and Build;
- Management Contracting; and
- Construction Management.

Northumberland County Council's key objectives for the delivery of the project are noted as follows;

- New Primary School to operate from September 2020
- RIBA Stage 4 Technical Design by 25 October 2019
- Submit planning Mid September 2019 (if required)
- Tender award end of January 2020
- Lump Sum Contract
- Risk reduced to manageable level

Management Contracting and Construction Management procurement routes involve the Client retaining a large portion of the scheme risk and in addition they do not provide a lump sum contract, therefore both options were discounted as they do not comply with the above parameters.

Traditional procurement allows the Client to retain design control and manage any changes throughout the RIBA Stages. It also allows a lump sum contract to be obtained prior to contract award.

Design and Build procurement shares risk between the Contractor and Client on a more even basis, design can overlap with construction activities commencing and a lump sum contract is obtained prior to contract award.

2.2 Recommended Option

It is recommended that WISE Academies follow a Traditional Procurement strategy to deliver the project using a single stage tendering process. This route to market enables WISE Academies to be more in control of the design and potential cost variations which is essential on refurbishment projects of this nature.

With refurbishment projects contractors are risk averse and whilst they would price the scheme on a design and build approach they would price the risk of unknown works

accordingly and whilst they then take this risk on board WISE Academies could pay quite handsomely for this. This may not be the best option in respect to value for money.

2.3 Procurement Approach

The project will be tendered through a traditional procurement approach utilising a single stage tendering strategy. Soft market testing would be undertaken prior to issue of the tender documents to establish the appetite of the market to this approach. Through observation of the market in the north east, on a scheme of this type and size, the current trend is a desire for a single stage tender approach.

Tender documents shall be prepared that detail the Academies requirements, which will incorporate detailed room layouts clearly showing the extent and scope of the refurbishment and an output technical and performance specification to determine the quality of the completed scheme.

To ensure a suitable main contractor is appointed to deliver the scheme, the tender documents will include a quality section that will require submissions to provide evidence and experience of working on similar types of projects and demonstrate that they have the capability to deliver. Most crucially, the tenderers must be able to show that they can deliver within the required timescales and have suitable experience of working within live School environments which may require a phased approach.

On receipt of the tender submissions, tenders will be checked both technically and arithmetically to ensure the price accurately reflects what was requested at tender stage. This will not only reduce potential disputes in the post contract phase but will also ensure that WISE Academies are receiving value for money.

2.3.1 Procurement Programme

A programme has been appended to this Outline Business Case to demonstrate the procurement of the project through a Traditional approach using the single stage tendering strategy at Appendix 2B.

An OJEU compliant Framework for appointing a Main Contractor would be the most appropriate route to market to achieve a tender issue date of early November 2019. This offers a more expedient route to market to enable WISE Academies to achieve a challenging, but achievable, programme.

Also, given the fact that the works may be undertaken in a live School environment would require an experienced Contractor to deliver the scheme and to get onto a Framework, a contractor must pass a quality review which assesses various aspects of their background and experience.

Tender documents shall be issued on completion of technical designs (RIBA stage 4). This enables WISE Academies to be confident that a design has been produced based on their specific requirements at each stage of the design development. Retaining control of the design at these stages, client side, is essential to ensure quality is not compromised and the relevant input is received and implemented from the key stakeholders.

Key Dates are as follows;

RIBA 3 and 4 Designs	RIBA 3/4 commencement	02 Sep 2019
	Submit for planning (if required)	16 Sep 2019
	RIBA 3/4 completion	25 Oct 2019
	RIBA 3/4 client sign off	01 Nov 2019
Tender process	Issue tender documents	08 Nov 2019
	Final tenders returned (6 weeks)	20 Dec 2019
	Tender review and report (1 week)	10 Jan 2020
Final Business Case (if required)	Submit final business case	13 Jan 2020
	NCC approval of FBC	24 Jan 2020
	Award contract	27 Jan 2020

2.3.2 Construction Programme

It will be the responsibility of the successful contractor to provide a construction programme to support the delivery of the construction project.

Upon appointment of the Contractor, a set of contract documents will be issued for execution by both the Contractor and Client. This will include a set of updated designs for Contract which will further develop into Construction Issue Drawings which is what the Contractor will use to undertake the works on site.

A period of 26 weeks for construction is anticipated inclusive of commissioning but exclusive of the 4 weeks mobilisation period. A period of 2 weeks is programmed for decanting the end user of the building which commences at handover.

Construction	Contract finalisation	27 Jan 2020
	Construction commences on site	17 Feb 2020
	Construction complete on site	14 Aug 2020
	Completion of commissioning	07 Aug 2020
	Decanting complete	28 Aug 2020
	School opens	01 Sep 2020

2.4 Summary

Following a review of procurement options available for construction projects, it is recommended that the development is procured through a Traditional strategy utilising a RIBA Stage 4 detailed design prior to tender issue.

It is further recommended that contractors are engaged through an OJEU compliant Framework as this offers a more expedient route to market to enable WISE Academies to achieve a challenging, but achievable, programme. It will also ensure that a contractor with the relevant experience is appointed.

Procurement Programme

The programme for procurement assumes the following;

- Commencement of RIBA Stage 3/4 designs on 02 Sep 2019
- Submit for planning (if required) on 16 September 2019
- Completion of RIBA Stage 3/4 designs on 25 October 2019
- Issue tender documents on 08 November 2019
- Tender return on 20 December 2019
- Contractor appointment on 27 January 2020

Construction Programme

- Construction commences on site 17 February 2020
- Construction complete; 14 August 2020

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

- 2A. Programme
- 2B. Procurement Report

3 SITE OPTIONS

Section 3 and **Appendix 3A and Appendix 3B** of this Outline Business Case describe the options appraisal undertaken to which contribute to the design and construction works of a preferred option.

3.1 Introduction

The scheme outlined involves the proposed development of a new educational facility in Haltwhistle to facilitate the adoption of a new two tier system. It will involve the expansion of the current Haltwhistle First Academy to a new Haltwhistle Primary Academy by absorbing Years 5 & 6 from the adjacent Middle Academy. The two schools currently jointly share a site and it is proposed years 7 & 8 will be transferred to the existing catchment High School. The Primary solution will remain located within the current site. The existing First Academy building and site are insufficient for the increase in pupil role without additional works.

This section outlines the potential development options considered and review to determine the most appropriate solution. The following option appraisal was carried out at the outset of the feasibility period. The full document is contained within Appendix 3.

3.2 Land Ownership

WISE Academies (WA) has a 99 year lease on the present First & Middle School sites.

3.3 First School Site Options

The current First School is approx. 1610sqm with 7no. teaching classrooms and a Nursery room. From analysis of the plans provided we found there to be general discrepancies with the standard requirements of a modern 1.5FE Primary school with 39 place Nursery 1782sqm (based on ESFA PSBP schedule) including but not limited to; Hall size - 128sqm as existing and would need increasing to 150sqm & the need for an additional 4no. classrooms.

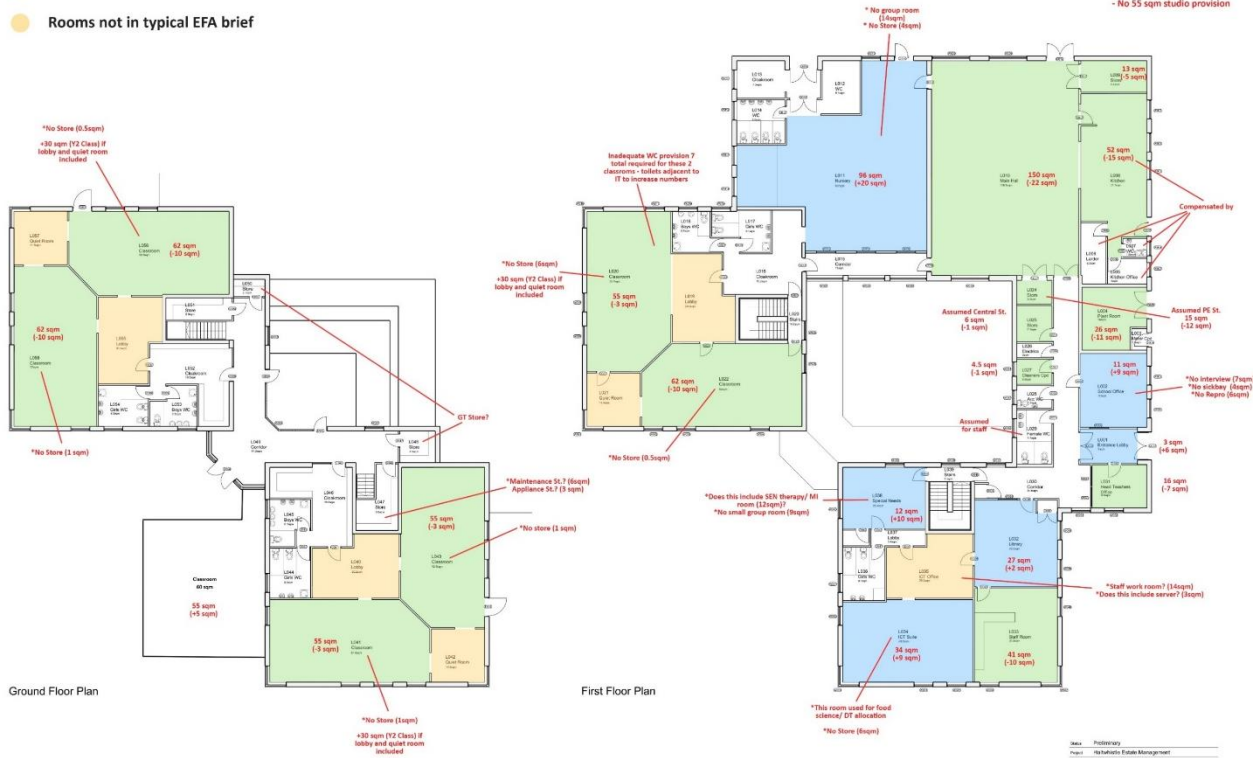
Issues with the functionality of the existing building include:

- The internal spaces are extremely busy wherever you go in the school.
- Circulation is often through other teaching spaces and it is clear the teachers have to work hard to ensure disruption is kept to a minimum.
- There are several pinch points through the school most notably the route to and from the dining hall.
- The Nursery enjoys good convenient access to outside space under the shelter of a canopy. However the reception pupils, who are on the upper floor, can only access outside spaces by coming downstairs, through the nursery and their outside space into the early years external teaching spaces.
- Split level site with formal entry at upper level and external learning play at lower
- Shared site entrance with private nursery and sure start centre
- Limited site area that doesn't extend easily

With these issues in mind and for comprehensive consideration of all options the team first looked at options relating to the current First School building and site.

- Rooms under area compared to standard EFA brief
- Rooms over area compared to standard EFA brief
- Rooms not in typical EFA brief

- Rooms missing from building -
- Hygiene Room 5sqm
 - No Est. Store 4sqm
 - No 55 sqm studio provision



First School Initial Analysis

3.3.1 Split Site

The first option considered was to 'do nothing' and utilise the existing building stock (First School and temporary classroom buildings). In this option early years would remain within the current First School building and Years 5 & 6 would be sited within the temporary classroom building. This would enable full refurbishment of both buildings.

Pros:

- No requirement for major building works – progressive refurbishment to be carried out to address acknowledged condition issues

Cons:

- Not practical for staffing
- Would require equivalent shared facilities at both sites
- Does not integrate Years 5 & 6 into school network
- Would prevent the sale and further development of the wider site

3.3.2 First School Extension

Alterations that could be provided via an extension option would include additional floor area for the Hall (to accommodate the circa 80 more pupils within the school – admittedly not in a preferred proportion) and a two storey classroom extension. The classroom extension is required to be over two floors to provide 4no. classrooms (2 per level to accommodate the new years 5 & 6) and is necessary to; connect with the current building (without materially affecting the function) and fit within the existing site perimeter. Located on the existing hard play it would require an increase of the site perimeter to provide the supplemental external learning/ play area from the loss and additional required for a school of this size.

Internal re-workings would be to bring the reception class downstairs and years 3 & 4 upstairs (requiring appropriate replacement toilet sizes) which would enable a more rationalised circulation with appropriate adjacencies.



Option 1 – Extension Site Layout

Pros:

- Maximizes use of first school site and existing infrastructure thus releasing the Middle School portion for re-purpose or re-development.
- Opportunity to rationalize circulation with remodel.
- Makes continued use of site. This portion of the site would be difficult to develop.

- Relatively economical in terms of the options/ remedial works.
- All school remains in one building under one roof.
- Remains close to private nursery (possibly a positive for the nursery too)

Cons:

- Connectivity of extension back to school at ground level only.
- DDA / accessibility issues will not be overcome
- Potential right of way to start requires altering.
- External play area separate from school making supervision an issue
- Pick up not really improved and would need to cater for larger numbers.
- External landscaping and provision of external teaching and play areas required.
- Hall is difficult to extend and roof shape makes it difficult to maintain height with any extension. Valley gutters will have maintenance issues associated with them.
- Disruption to school function during works / possible temp. accommodation or dual site use whilst works are undertaken.
- Loss of external space during works. May have to consider providing the external space in an early phase to facilitate current playground being taken as a contractor's compound.

3.3.3 First School Satellite Accommodation

Due to the complications involved in an extension option the team then looked at a satellite option. This would involve new build accommodation situated on the adjoining land adjacent to the current western site boundary. The essence of the option is identical to Option 1 (i.e. internal re-workings) and indeed the same additional floor provision as the extension to limit the footprint.

Pros:

- Maximizes use of first school site releasing Middle School site for re-purpose or re-development.
- Opportunity to rationalize circulation with remodel.
- Makes continued use of site in what is a difficult site to otherwise develop.
- Relatively economical in terms of the options.
- Remains close to private nursery (probably a pro for the nursery)
- No Loss of external space during works.

Cons:

- Remoteness of years 5 & 6 from shared facilities
- DDA / accessibility issues will not be overcome
- Potential right of way to Sure Start requires altering.
- External landscaping and provision of external teaching and play areas required.
- Hall is difficult to extend and roof shape makes it difficult to maintain height with any extension. Valley gutters will have maintenance issues associated with them.
- Disruption during works / possible temp accommodation or dual site use whilst works are undertaken.



Option 2 – Satellite Accommodation Site layout

3.4 Middle School Site Options

The unsatisfactory options involving the reworking of the existing First School lead to the remodel and refurbishment of the existing Middle School being considered. The existing building is more than adequate in floor area for the increased pupil role and therefore does not require any new build accommodation at all. In addition it contains features such as large hall with fixed stage, large gymnasium and oversized kitchen. Utilising the building would also prevent any impact to the First School during works.



Middle School Initial Analysis

3.4.1 Middle School Remodel & Refurbishment

Internal works would consist largely of the remodelling of the teaching block to provide accommodation and adjacencies in line with the schools teaching ethos.

Pros:

- No need for new build extensions
- All classrooms within close proximity
- Additional studio provision not in First School
- Community use possible out of hours
- Existing stage area
- Independent access from neighbouring properties/facilities

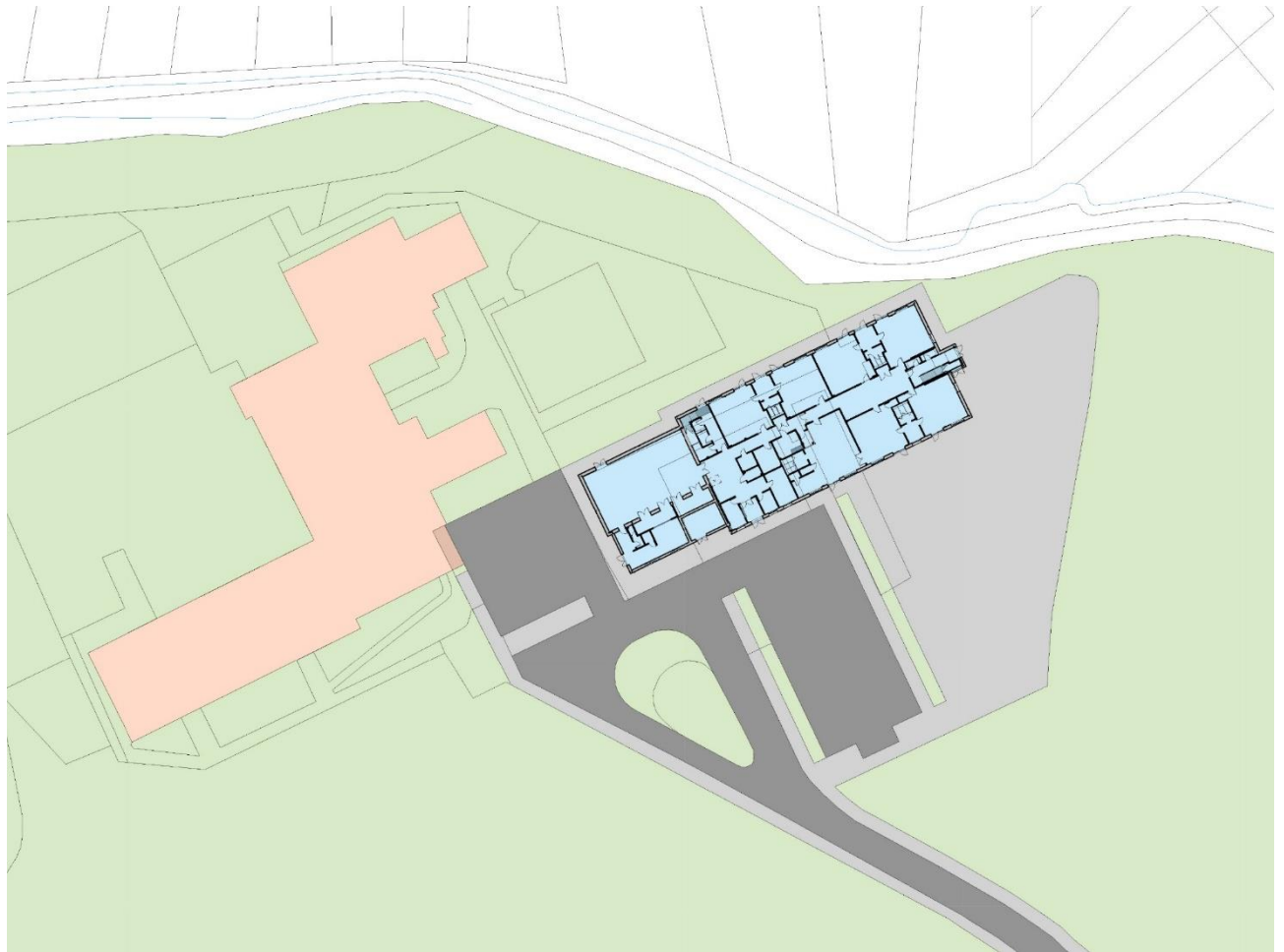
Cons:

- DDA / accessibility issues will not be overcome
- Greater amount of internal refurbishment/alteration

3.4.2 New Build Primary School

In addition to the extension & remodel options, for completeness the team looked at a new build option utilising the vacated Middle School site. An option was considered to build adjacent to the First School but it was proved to be impractical due to its limitations.

A standard two storey floor plan was used for the exercise but if it had proved to be viable a more bespoke shape floor plan would have been developed responding to the context.



Option 4 – Site Layout

Pros:

- Maintain existing Middle School access road, relieving stress on entrance areas around First School, leisure centre and Sure Start Centre
- Removes need to potentially reroute access to Sure Start Centre
- Utilises existing Middle School external areas
- Less disruption to external play areas during construction

Cons:

- New space standards for hall's, classrooms etc. may sometimes be smaller than what the staff are currently accustomed to.
- Cost of full new build may be out with anticipate budget

- This might prove simplest build however it would not necessarily release the whole site which may be a key consideration.



Option 4 – New Build Floor Layouts

3.5 Children’s Centre options

An options appraisal of the inclusion of the Children’s Centre on the middle school site. Five different options are considered.

1 – The Children’s Centre uses approx 80sqm in the main building, adjacent to the existing main entrance.

Pros:

- This would contain a separate and distinct entrance, next to the school main entrance, and provide toilet facilities, small meeting space and playroom. It would have shared staff/welfare facilities. It would mean there are no additional infrastructure costs as ramp access etc would all be provided already for the main entrance.

Cons:

- There is no outdoor space available adjacent to the space in this option (it is at the main entrance to the school).
- The proposed space is significantly smaller than the requirements of the Children's Centre

2 - The Children's Centre is relocated into the existing demountable classrooms.

Pros:

- The space is bigger than the Children's Centre current facilities; their requirements are approx. 255sqm, while the demountables capacity is 302sqm.
- There would be direct access to greater outdoor space, greater than currently occupy. It would have separate distinct entrance etc.
- This solution would demonstrate short term value for money

Cons:

- The Children's Centre is being relocated to another temporary building, and not seen as part of the permanent solution on the site. It is the wish of NCC for the Children's Centre to form part of the permanent building, and therefore this solution is not feasible.
- The demountable classrooms would need to remain in their current location, while they may need to be relocated elsewhere by NCC

3 - The Children's Centre remains in its current location, where it already has suitable facilities.

Pros:

- The education element of the scheme is not compromised by the addition of a Children's Centre.
- There is no loss of school or community facilities by the Children's Centre relocation.
- There would be no financial implication to the scheme

Cons:

- This is not the preference of NCC.
- The reuse of surplus land by NCC would be compromised

4 - The Children's Centre is relocated into the existing Caretaker's House.

Pros:

- It has site benefits for users in terms of accessibility and location, would meet some of the Children's Centre internal requirements.
- It also would have outdoor space, and have fewer legal complications re lease.

Cons:

- It is not part of the proposed WISE Academies site.

5 – The Children's Centre is relocated into the current gymnasium.

Pros:

- The Children’s Centre would become part of the main building.
- The majority of the Children’s Centre space requirements would be met.

Cons:

- There would be some compromise in the Children’s Centre space requirements.
- There are M&E concerns about the routing of existing heating pipework (running from the plantroom, under the hall floor, and then into the main building) which would require further investigation.
- Any community use would need to be relocated into the main school hall; Brownies, Cubs etc currently use the facility on a weekly basis.

It is the view of NCC officers that the most appropriate option would be Option 5.

3.6 Summary

This section outlines the initial option analysis for the provision of the Primary School on the existing site.

From review of the options with the Academy and School it was felt that given the financial & programme constraints and the issues with the existing First School that the only feasible option would be to remodel the existing Middle School.

The Options Appraisal for the Children’s Centre has been carried out. It is understood NCC prefer Option 5 for the Children’s Centre.

The following documents are attached at **Appendix 3:**

3A	Initial Feasibility Study/ Options Appraisal
3B	Children’s Centre Gym redevelopment 1 st draft

4 DESIGN AND CONSTRUCTION

Section 4 and **Appendix 4** of the Outline Business Case describe the further development of Option 3 – Middle School Remodel & Refurbishment to demonstrate feasibility.

4.1 Introduction

The feasibility study that has formed this OBC was carried out over a seven week period during May and June 2019 following the selection of the Middle School Remodel and Refurbishment as the preferred strategy.

The feasibility study is intended to demonstrate that a new Primary School can be established at the Middle School building within the current site through a combination of remodelling and refurbishment with supplementary external landscape works.

The feasibility study is cognisant of the following site constraints which include:

- The existing Middle School is approx. 60 years old
- A significantly sloped site
- A restricted site access with limited on-site parking
- Challenging main road access through narrow housing estate road
- Temporary classroom on site that will likely be removed by the local authority

The feasibility has been progressed in consultation with Northumberland County Council.

While feedback has been generally positive, the feasibility study represents an initial design proposal, and inevitably design development will be required to ensure a successful outcome in terms of satisfying project stakeholders and external stakeholders.

4.1.1 Education brief

WISE Academies have developed the Education Brief alongside the feasibility study, working closely with the architects. The Education Brief therefore aligns with the design proposal.

Combining the education of an extended age range onto one site clearly has both educational and operational benefits. The options appraisal indicates the most appropriate site for this would be a modified Middle School refurbishment.

WISE Academies are keen to develop a 'schools within schools' solution which meets the needs of the learners, while also utilising the multi-storey nature of the existing building.

The intention is to make children feel part of smaller 'mini-schools', and maximising learning time for all children by providing necessary facilities on each floor. Teachers will teach pupils in traditional classes, and from across the age range in specific subjects, providing a creative way of tackling the transition to secondary school. Transitions between classes therefore need to be easy, and circulation space kept to a minimum. Teachers and children could be moving from one to another at frequent points throughout the day.

Early Years facilities would be located on the ground floor, enabling them to directly access the outdoors as part of their curriculum entitlement. Best practice would enable children to access their classroom directly from their entrance to school, and would make the transition/handover seamless, ensuring safeguarding is robust. Passive supervision enables

effective use of toilet facilities while children are either indoors or outdoors. The outdoor provision is designed with a view of utilising the natural environment wherever possible. Getting provision correct for our youngest pupils will be a key feature of tackling early literacy issues some pupils present with, and in doing so closing any academic gaps and increasing their employability opportunities as they get older.

As pupils move to the next stage of their education, children in Key Stage 1 will be taught together on the first floor. Their classrooms are closely situated, allowing children to flow easily from room to room when their teaching dictates; moving from one group to another from Literacy to maths for example, or receiving personalised phonics in a smaller group. To further maximise learning time, toilet and cloak facilities are provided on the same floor. Provision has been made on this floor for one classroom to be larger than the others in order to provide an appropriate transition from Early Years to Year 1. The change in expectations as children get older needs to be supported by the physical environment. Also provided on the floor is a small amount of LRC space; this will house the library provision for children in this age range (given reading is a key driver in the school development plan and new Ofsted framework) while also allowing children in this phase to meet for drama, small group provision etc.

On the top floor, children from Key Stage 2 will be taught in traditional classrooms. These oldest children have been chosen as the most appropriate to climb the two flights of stairs each day. Toilet and cloak facilities are provided on this floor as detailed previously – the learning time lost would be significant should they have to travel to the ground floor. It is intended that there will also be some additional space to allow intervention and personalised teaching on this floor to ensure the children are ready for the next stage of their education in secondary school.

The Trust is keen to ensure that the new extended age-range, in a suitable learning environment, can enable the school to look to the future with confidence and provide an exciting future for the Haltwhistle community.

4.2 Surveys and Investigations

Resources have been commissioned to undertake various site options appraisals, to determine build ability, affordability and to collate the OBC.

This section of the OBC would usually detail the results of the surveys which have been undertaken as part of the feasibility exercise and summarise the outcomes of these. However the timescale of the process proved preventative.

From the list of surveys and investigations identified by the project team that would be required for this stage of the exercise (and a future potential planning application) the following were begun June 2019 but not completed in the timescale:

- Asbestos Refurbishment and Demolition Survey
- Intrusive Structural Survey (preliminary)

It is intended that the following surveys will be carried out immediately following the success of the OBC:

- Phase 1 Desktop Study (Flood Risk tbc)
- Phase 2 Intrusive Ground Investigation Study

- Measured Building Survey of the Middle School incl. Utilities and Topographical
- Preliminary Ecological Assessment incl. Bat Survey
- Transport Assessment and Travel Plan

The particular nature of the chosen strategy limit the impact of not having these surveys in place at this time.

4.3 Design Journey

In developing the feasibility study's initial design proposal, and mindful of the site constraints, we have chosen to minimise risks associated with planning, highway and Sport England as far as possible.

Given the anticipated budget the team has limited the amount of external works and as such opted for the following decisions:

- Reuse of full Middle School building
- Retain as many of the existing trees as possible to respect the setting of the existing building to minimise planning risk
- Retain the existing vehicular site access from Park Avenue and restrict drop off to minimise safety and congestion risks
- Retain the existing topography to minimise associated costs due to extensive earthworks. External works will be carried out on level areas or via the provision of elevated terraces.

4.3.1 Option Appraisal

As previously stated in Section 3, initial concept designs were developed for each of the locations/ strategies. However upon consideration of the sacrifices required to adapt the current First School and costs being prohibitive for a new build, the remodel of the Middle School was the only viable option.

Budget constraints have determined the need for two options. The remodelling works required to make the school functional is contained within both options as necessary works. However the extent of refurbishment is possible to be budget driven, and therefore a reduced specification has been determined for the feasibility of the scheme.

4.3.2 Feasibility Design

4.3.2.1 Access

The access and parking provision of the Middle School is superior to that of the current First School. In and out vehicular & pedestrian site access to the site will remain principally from Park Avenue and the approach road with adjoining pathway to the school retained. Additional pedestrian access will also be retained to the existing First School site & Leisure Centre car park which is to remain utilised by parents.

On site currently there is provision for; 6no. accessible spaces/ drop off with a side car park providing 23no. spaces (19no. staff & 4no. visitor). It also provides 16no. cycle racks. Northumberland Policy guidelines on new developments states 1 space per Full Time Teaching Staff, 1 space per 3 Ancillary Staff and half of total staff provision to be provided for

visitors. 1 space per 10 pupils to be provided for cycle storage. Staffing projections are as follows:

- 13 teaching (full time)
- 14 teaching assistants (7 part time)
- 16 other (14 part time)

These numbers would equate to a requirement of 29no. spaces for staff alone (22no. full time staff and 7 no. part time). Non playing surface landscaped area that surrounds the current parking can be utilised to increase the current provision as required. Should the temporary classrooms be removed this would offer further facility for additional parking and cycle storage to be provided on site. The proposal is to retain the current functional turning facilities with the allowance made to rework the existing parking as required.

4.3.2.2 External Areas

The Middle School site exceeds BB103 guidance for site area. Plateaus exist to the south of the school for community playing pitches and soft play. Hard play is provided to the north of the school with direct access to the teaching block. The site is currently unsecured and will require a new perimeter fence and security gates to ensure pupil safeguarding. Discussions between Wise Academy and Northumberland County Council are ongoing as to the extent of the new perimeter and its future proofing. Sport England will also be consulted however currently there are no plans to lose any playing surfaces within the feasibility study.

Landscape works are primarily restricted to the essential external learning and play areas of the early years (Nursery & Reception Classes) as vital to the function and education of these years. New terracing is to be provided to facilitate access from these classrooms to new external landscaped areas. New ramped access is provided to these areas in awareness of the physical stature of the younger pupils and the buggies etc used by young families.

4.3.2.3 Massing and Identity

The feasibility proposes to retain the entire existing Middle School building therefore the massing and its visual obstruction will remain unaltered. Appearance alterations will consist of the original single glazing window system and doors being removed as the budget allows. The south elevation in particular excessively overheats and isn't safe in a modern school environment. It will be replaced with a new curtain wall system/ windows that will modernise the aesthetic appearance of the school and provide appropriate thermal/ ventilation performance along with important security and appropriate cill heights. Projecting fin walls and west gable will be insulated and re-clad to link these elements together. These subtle amendments will provide the school with the new identity it desires.



Proposed South East Perspective Visual

4.3.2.4 SEN Accessibility

The feasibility study does not propose any new build accommodation elements and, from discussions with the local authority, has prioritised the address of access to the ground floor. The upper floors access arrangements will be retained. Currently level access is provided to the building main entrance, playground access from the teaching block and rear hall entrance. Significant site slopes have necessitated the original building to provide stepped access to other entrances including the main pupil entrances to the south of the teaching block. As such new external access terraces are proposed to early years, in which level access is required, with a new ramp access. New access door provision to the Hall will provide level access from the hard play. Therefore all interventions improve the current provision.

4.3.2.5 Internal Layout

The team has limited information on the history of the school building, we have assumed all is original. It is proposed to restrict alteration in the main to the teaching block (three storey element) with limited amendment to staff, hall and store areas.

The current entrance lobby will be retained in its present location but bolstered with the adjacent office converted to provide visitor accessible WC and interview/ meeting room. The Head Teacher WC will be remodelled to provide a further accessible WC for use by staff principally. The adjacent Main Hall will receive a centralised net to enable two class usage and the existing stage will be used for performance/ music.

Within the teaching block the ground floor will be remodelled to provide new teaching/ play classrooms for the Nursery & Reception years. These are afforded their own cloak, kitchen and WC provision and external access to the new woodland early years external play area. Older years WCs are provided for ease of access and security during break time. Staff social/ work accommodation is provided with good passive surveillance of the hard play area with new Parent Support provision with appropriate adjacencies. Existing stair cores are retained for both beginning/ end of day access (south door) and break times (north door). Soft play access to the south will only be accessible via the eastern core as the western will be a vital circulation zone for early years throughout the day.

The first floor of the teaching block will be used by years 1 & 2 with the provision of 3 classrooms. An enlarged year 1 classroom will provide extended learning provision for a smoother transition for under developed pupils. The vital resource of the existing Art & design technology room will be completely retained including its kiln. At the wish of the Academy a

homogenous LRC/ SEN zone is provided that will provide essential support and resource to the year groups on this level. New WC provision is accessed via both stair wells.

The second floor of the teaching block will be used by years 3, 4, 5 & 6 with the provision of 6 classrooms. At the wish of the Academy a homogenous LRC/ SEN zone is provided that will provide essential support and resource to the year groups on this level. New WC provision is accessed via both stair wells.

4.4 Carbon Reduction

The feasibility proposes to retain the existing building therefore new build considerations and methods for carbon reduction are restricted. Consequential improvements proposed for the building envelope would consist of works to the façade and roof. The façade would involve a replacement of the underperforming existing glazing and doors to provide appropriate replacements that will provide the appropriate thermal and ventilation performance, security, opening heights etc for a building for this age range. In addition to this the roof would receive replacement/ supplementary insulation to further improve the building's thermal performance. Internally it is proposed to completely refurbish the mechanical engineering system with the exception of the existing boiler plant which is approximately 12 years old and does not warrant replacement.

4.5 Third Party users

Community use of the First school and Middle school buildings (including Cubs, Brownies & Drama clubs) will be retained in the new building and hopefully increased as it is key to the ethos of the academy. The strategy to utilise the Middle School building also ensures the maintaining of sports changing for the playing pitches.

4.6 Caretaker's House

A caretaker's house exists as part of the current Middle School. It is proposed that this be out with the new site boundary and be unaffected by this feasibility study.

4.7 Health & Safety

The feasibility proposes to retain the existing building therefore it is assumed that the building is currently safe and does not infringe any current legislation. Proposed new works will be far removed from the functioning First School site and easily hoarded from the temporary years 5 & 6 accommodation and will therefore pose no risk. Appropriate surveys will have been carried out prior to works to enable experienced contractors to anticipate issues and adhere to health and safety standards during the build.

Maintenance of the existing building is not anticipated to change as a result of the works.

4.8 Summary

The feasibility study has taken into account Wise Academies' educational brief, site factors and budget constraints in determining the appropriate proposal. It has also been cognisant of potential planning, highways and sport England input moving forward.

The minimal external elements of the works have limited the impact of future surveys due to the short timescale.

It is therefore considered that the feasibility study demonstrates the viability of relocating the First School and additional Years 5 & 6 to utilise the existing Middle School building to create the necessary new primary school. It also provides a sound basis for the completion of the design as indicated by the developed drawings prepared in conjunction with the Academy.

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

4A	WISE Academies Education Brief
4B	1234-NOR-01-00-DR-A-00-0002 - GA FLOOR PLANS - AS PROPOSED
4C	1234-NOR-01-ZZ-DR-A-00-1003 - GA ELEVATIONS - PROPOSED
4D	1234-NOR-01-ZZ-DR-A-00-1004 - GA VISUALS - PROPOSED
4E	1234-NOR-01-ZZ-SH-A-00-4001 - SCHEDULE OF ACCOMMODATION

5 Commercial Appraisal

Section 5 of this OBC describes the commercial appraisal for the options available for the scheme.

5.1 Introduction

This section for the Outline Business Case examines and sets out the current position with regards to the commercial viability of the scheme.

WISE Academies along with its Technical Advisors has undertaken a feasibility cost assessment of the scheme, based on the options outlined earlier in section 3.

5.2 Funding

The scheme is to be funded by NCC.

WISE Academies have agreed to contribute £153,557 to the scheme to make up the shortfall against the budget as well as new FF&E and ICT equipment. WISE Academies have also confirmed that CIF funding would be used to undertake further improvements to the rest of the School as necessary.

5.3 Project Assumptions

A number of assumptions have been used in calculating the scheme costs and are identified as follows:

- Traditional Procurement Route
- Works to be completed by September 2020
- Works to be carried out during normal working hours
- Contractor's working area can be located in a reasonable position on site with unrestricted access
- Works to be undertaken in one visit with uninterrupted access – assumed that the building will be empty during the works
- No abnormal planning requirements
- No abnormal agreements with adjacent land owners
- No utilities upgrades as the building is not increasing in size
- Repairs only allowed to the upper floors – to be further reviewed on completion of the building structural survey
- Allowances included for ecology and asbestos removal – to be confirmed by specialists
- Reconfiguration works to the existing Middle School gym to form the Children's Centre.

The following exclusions also apply:

- VAT
- Capital allowances
- Contaminated land, mining works and any other unknown obstructions or findings
- Abnormal drainage requirements
- Works associated with any planning conditions
- Third party grant or funding, other than those mentioned above
- Land acquisition costs
- Maintenance costs
- Legal and Finance costs

- Loose FF&E and ICT equipment
- Any works to the existing stairs including balustrading
- New lifts and internal ramps to form DDA access
- Demolition of any School buildings

The Schedule of Areas and pupil numbers are the key driver for the funding for construction costs. These have in turn assisted with the generation of the design options on which the cost information has been prepared. The scheme has been designed to accommodate 315 pupils.

5.4 Overall Construction Cost

WISE Academies and its Technical Advisor have developed costs for each of the options to demonstrate the scheme's affordability. Build cost rates used have been taken from the Building Cost Information Service (BCIS), in-house cost data and by benchmarking against other recently completed schemes of a similar size and nature.

The table below provides a cost comparison of the Option Estimates:

Table 5a: Overall Scheme Options

Overall Scheme Options Cost		
Ref	Option	Total
1	Refurbishment of the existing First School building including a new extension to assist with the increased pupil numbers	£3,394,280
2	Refurbishment of the existing Middle School building – Option A	£3,579,525
3	Refurbishment of the existing Middle School building – Option B	£2,653,557
4	New build 1 ½ form entry Primary School	£5,777,280
5	Do nothing (backlog maintenance – long term works required outside 5 year planning period)	£1,711,899

5.4.1 Middle School Refurbishment Options

Option A includes the following:

- Internal refurbishment to all floors of the 3 storey block only (refer to the items below for other areas of the rest of the School where specific works have been allowed).
- New curtain walling/windows throughout the 3 storey block and the rest of the School to replace existing.
- No work to the Art/DT room other than paint/decoration and new door leading into the room
- Allowance for quilt insulation in the roof space through the 3 storey block and the rest of the School
- Complete mechanical and electrical replacement to the 3 storey block and the rest of the School except new boiler plant installation as the existing is approx. 12 years old and therefore doesn't warrant replacement
- Painting/decoration throughout the 3 storey block and the rest of the School
- External works comprising new ramp, terraced area, canopies, cycle shelters, 6no. parking bays, whitelining, and play surfacing including perimeter fencing to this area and also to the entire site perimeter based on the red line boundary. Please note that limited information is available at this stage but allowances have been included for the items noted.

Option B includes the following:

- Internal refurbishment to all floors of the 3 storey block only
- New curtain walling/windows throughout the 3 storey block and main entrance only to replace existing.
- New external doors to the existing hall
- No work to the Art/DT room other than paint/decoration and new door leading into the room
- Allowance for quilt insulation in the roof space through the 3 storey block only
- Mechanical and electrical replacement to the 3 storey block with minor remedial type works to the rest of the School except new boiler plant installation as the existing is approx. 12 years old and therefore doesn't warrant replacement. Please note that a reduced scope of work has been priced under the assumption that some of the existing M&E can remain.
- Painting/decoration throughout the 3 storey block only
- External works comprising new ramp, terraced area, canopies, 6no. parking bays, whitelining and play surfacing including perimeter fencing to this area and also to the site perimeter based on the red line boundary. Please note that limited information is available at this stage but allowances have been included for the items noted.

5.4.2 Abnormal Costs

During the development of the options, surveys and investigations have been requested and instructed. As a result, abnormal costs have been identified, estimated and are summarised in table 5b.

Table 5b: Abnormal Cost

Category	Option 1 (£)	Option 2 (£)	Option 3 (£)	Option 4 (£)	Option 5 (£)
Ecology	10,000	10,000	10,000	20,000	N/A
Increased foundations	25,000	N/A	N/A	100,000	N/A
Arboriculture	20,000	N/A	N/A	20,000	N/A
Suds/Drainage/Attenuation	25,000	N/A	N/A	200,000	N/A
Stats / diversions	50,000	N/A	N/A	100,000	N/A
Demolitions	N/A	N/A	N/A	202,000	N/A
Asbestos Removal	10,000	20,000	20,000	N/A	N/A
Transition	20,000	20,000	20,000	125,000	N/A
Children's centre works	N/A	200,000	200,000	200,000	N/A
Total	160,000	250,000	250,000	967,000	N/A

The list of abnormal items has been collated, in part, from the preliminary results of the various surveys which have been carried out as part of the OBC process.

- An ecology survey will need to be undertaken to determine if there will be any impact on the environment and existing buildings as a result of undertaking the works.
- Costs have been included to enhance foundations due to unfavourable ground conditions because of site level issues and made ground.
- Tree surveys may need to be carried out particularly where we are building an extension or new build that will require any tree removals.
- The new build and extension options may require drainage solutions such as sustainable urban drainage systems (SUDS), attenuation tanks, ponds, and soakaways etc. so an allowance has been included for this.

- The new build and extension options may/will require new gas, electricity and water supplies, together with the removal of any existing redundant services.
- Allowances have been included under the new build option to demolish the existing First and Middle School buildings.
- Allowances have been included for asbestos removal however this will need to be confirmed once we have results of the Refurbishment and Demolition Survey.
- All options will require a period of transition to decant into the new spaces and as such allowances have been included for this.

5.4.3 ICT, FF&E

Costs for end-user ICT equipment and loose FF&E have been excluded from the estimate.

5.4.4 Fees

Professional and Design team fees have been included in the construction costs.

5.4.5 Children's Centre

An allowance has been included within the Middle School Refurbishment options to convert the gym within the existing Middle School building, to create the new children's centre provision. Please note that this cost does not include for any external works other than external fencing.

WISE Academies have also prepared an options appraisal to discuss other locations for siting the children's centre.

5.4.5 Cost Split

The Middle School options have been split between refurbishment works required to convert the School to a Primary School and backlog maintenance costs as requested by the Council.

5.5 Summary

The preferred option (option 3) is to refurbish and remodel the existing middle school building into a new primary school.

This option negates the requirement of building or to extending on site with a loss of playing space and potential complications with Sport England. It also represents the most affordable viability at just over £2.65m and includes £200,000.00 for the Children's Centre works.

WISE Academies will contribute £153,557 in support of the above. Additional contributions, over and above the £153,557, will be provided to purchase new FFE and ICT equipment.

WISE Academies have also confirmed that they will use their CIF funding allocation in future years to undertake condition improvements to the non-teaching part of the school.

6 READINESS TO DELIVER

Section 7 and **Appendix 7** of the OBC sets out the Local Authority's project management structure and identifies the roles and responsibilities of each part of the structure. The key members of the team and the external advisers are named, and information is provided on their skills, experience and time commitment to the project. This section also sets out the approved budgets (including consultant advisory fees) and the delegated authorities given to a named senior officer within the key stakeholders.

6.1. Project Governance

The Northumberland County Council process for project structure and governance has been established to oversee and manage the relevant stages of this initiative. The project will be monitored through Property Liaison Group which is chaired by Dean Jackson, Service Director of Education and Skills. Mark Elliott, NCC's Project Support Officer, will be responsible for attending and reporting progress into Property Liaison.

Any exceptional circumstances would be escalated up to the Major Education Capital Projects Board. Membership of the Project Board is as follows:

Table 6a: Major Education Capital Projects Board Membership

Project Board Membership		
Name	Post	Role
Cath McEvoy-Carr	Executive Director of Adults & Children's Social Care and Education	Chair
Sue Aviston	Head of School Organisation and Resources	Project Director
Dean Jackson	Service Director of Education and Skills	Member
Alistair Bennett	Principal Accounting Manager	Member
Alison Elsdon	Service Director Finance	Member
Paul Johnson	Acting Executive Director of Place	Member
David Laux	Head of Technical Services	Member
Teresa Palmer	Head of Procurement Shared Services	Member
Mike Turner	Head of Property and Capital Programming	Member

A Project Steering Group and Project Team have been established, although membership of either group may be subject to variation according to the requirements of the project should it move forwards to implementation.

Table 6b: Project Steering Group Membership

Project Steering Group Membership		
Name	Post	Role
Wayne Daley	Deputy Leader of NCC and Lead Member for Children's Services	Chair
<i>NCC to complete</i>	<i>Lead Member for (NCC to advise)</i>	Member
<i>NCC to complete</i>	<i>Lead Member for (NCC to advise)</i>	Member
Ian Hutchinson	County Councillor	Member
Paul Martindale	Regional Hub Lead	Member
Zoe Carr	CEO Wise Academies	Member
John Wood	Trustee	

Sue Aviston	Head of School Organisation and Resources	Member
Dean Jackson	Service Director of Education and Skills	Member

The Project Steering Group, outlined in Table 6B, is a consultative group between the academy trust and the LA. The group will represent the local area and will ensure the local views are taken into account through the development of the project.

6.1.1 Project Management

A project team has been assembled to undertake various site options appraisals, to determine buildability, affordability and to produce this OBC for review and decision by the Council's Cabinet. These appointments were made direct through WISE Academies which were via a competitive tendering process, selected on best value.

The project team has a breadth of experience of successfully delivering significant school capital projects, from consultation to implementation, for the DfE and for local authorities, including Northumberland County Council.

If the scheme is approved to move forward, a procurement exercise will be required to be undertaken by the Authority to appoint a full multi-disciplinary design team with the experience, capacity and suitable resources to ensure successful delivery. This appointment would need to be in place in readiness for the approval of the OBC.

Table 6c: Project Team

Academy Project Team		
Role on Project	Position	Name
Project Sponsor	Executive Director of Adults & Children's Social Care and Education	Cath McEvoy-Carr
Project Director	Head of School Organisation and Resources	Sue Aviston
Project Assistance	Project Support Officer	Mark Elliott
Wise Academies Trust Representative	Chief Executive Officer	Zoe Carr
Wise Academies Trust Representative	Regional Hub Lead	Paul Martindale
Wise Academies Trust Representative	Headteacher	Susie Drake
Technical Advisor	Project Management Services	TBC

6.2 Consultation and Statutory Appraisals

6.2.1 Wise Academies Trust's Significant Change Consultation

In Autumn 2018 WISE Academies proposed a single primary school serving the Haltwhistle communities be established on the most appropriate site, in line with the Northumberland strategy for change and timescales. Trustees of WISE Academies took the decision to formally consult on this proposal and a period of consultation took place from October to December 2018.

Feedback from the consultation exercise demonstrated strong support for a primary academy to be established with a recognition that the proposal had the potential to bring new facilities and benefit the education and outcomes of pupils.

The Trust then applied to the Secretary of State requesting formal closure of the middle school, alongside an application to extend the age range of the first school. This was considered by the Regional School's Commissioner (RSC) and received approval, subject to Secretary of State consent, on 30th January 2019. A further listening period was carried out between 21st March 2019 and 17th May 2019. No objections were made during this period. Following this, the formal consents have been received by the Secretary of State in July 2019.

6.2.2 Other Consultation

Current and future planning consultations

Relevant bodies will be formally consulted to develop the proposals in order to incorporate their views within the various site option appraisals. Implementation is subject to NCC approval at Cabinet.

As the preferred option for WISE Academies has been identified as the refurbishment and remodelling the middle school into a new primary school, these proposals would now form the basis of the planning submission.

Planning policies would be fully adhered to, appropriate sporting provision is being made to meet Sport England requirements, rights of way would be adjusted where necessary and discussions will be held with Highways to ensure all appropriate needs and standards are met.

6.3 Market Testing

Soft market testing will be undertaken with framework providers and their associated supply chain partners, suitably sized contractors in the local North East market, to gauge expressions of interest for the scheme and for tendering via the proposed procurement route.

However, this would be further tested by the hosting of a bidder's day, wherein several suitably sized contractors would be invited to attend in person to meet with the project team to hear about the aspirations and objectives of the proposed school development.

The project team would make a short presentation on the scheme, its design proposals and programmed route to market, with a question and answer session to follow this.

The project team would be looking to clarify:

- Aspirations and objectives that NCC, together with their stakeholders namely the WISE Academies, have for the development;
- Appetite from the market for bidding for the opportunity via a single stage tender procurement route; and
- Evidence that contractors have resources and supply chain partners available to react to the challenging procurement programme.

6.4 Risk

A risk workshop will be undertaken early in the next stage of the programme which will include the Client's Team, WISE Academies, the Project Team and the Council's Risk Manager, who will facilitate the process. A risk register will be developed and managed by the Project Director with specific input from the Project Team.

The Risk Register will identify risks, mitigation measures and team member responsible for each risk.

Discussion of risks is included as a regular item on the agenda of the Project Board.

6.5 Summary

Northumberland County Council has put in place resources for the duration of the project, including post contract, to monitor and maintain ongoing relations between the Northumberland County Council and WISE Academies to ensure the effective delivery of the project, throughout its lifetime.

A procurement exercise will be required to be undertaken by the Authority to appoint a full multi-disciplinary design team in readiness for the approval of the OBC.

A risk workshop will be held, and a risk strategy developed early in the next stage of the programme.

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

None

7 MOVING FORWARD

7.1 Preparation for Procurement

To achieve the key programme objective, identified in section 2.1, principally handover of the building to allow occupation for September 2020 several critical path activities must be achieved, namely

- RIBA Stage 3/4 Designs to be completed by the end of October 2019
- Submit to planning mid September 2019 (if required).
- Contract to be awarded by the end of January 2020
- Construction to commence mid February 2020

To award contract in January 2020, the tender documents must be issued no later than the beginning of November 2019 to allow the contractors sufficient time to price and submit their proposed tenders as well a time period for reviewing and assessing the tender submissions prior to a recommendation for acceptance.

To achieve these timescales, RIBA stage 3/4 designs will need to commence by early September 2019. This requires the design team to commence immediately on approval of the OBC.

This stage would also include liaison with various stakeholders and finalisation of the site surveys and investigations to help reduce unknowns and minimise risk. If planning is required for the proposed change to the elevational treatments, then this can run in parallel with the design and tender stages.

A window of a single week for client sign off has been included at the end of each RIBA stage to ensure that the design is developing in line with the Client, end user and stakeholder's requirements. It is essential that these timescales are followed so as not deviate from the critical path and to ensure the School can open as a Primary School in September 2020.

The project team can help assist with guidance and advice around Framework options and other potential platforms that may be used for appointing a contractor. This will involve liaison with NCC procurement and framework providers and their local supply partners to gauge interest and a further review of market trends to ensure the best route is chosen.

Upon receiving the tender submissions, there is a one week evaluation period to review the documents and to prepare the final business case (if required) for submission to NCC's full cabinet.

A 26 week build programme is anticipated however the Contractors will be afforded the opportunity to submit an alternative tender which may realise programme benefits. Completion by the middle of August 2020 will be written into the documents as an Employer's requirement.

7.2 Summary

A critical path of scheduled delivery activities has been provided based on the proposed route to market, Traditional Single Stage Procurement, and in line with the Public Contracts Regulations [PCR] 2015.

The design team will need to be appointed immediately on approval of the OBC for the key milestones to be achieved. The design process will progress on such appointment and will need to be at RIBA 4 / tender issue level by the end of October 2019.

Designs will be monitored throughout the design stages to control cost ensuring the scheme remains within budget and various surveys and investigations will be undertaken to help reduce unknowns and therefore minimise risk.

An OJEU compliant framework will be sourced in conjunction with NCC Procurement to maintain programme and to ensure the best route is chosen.

APPENDICES

APPENDIX 1:

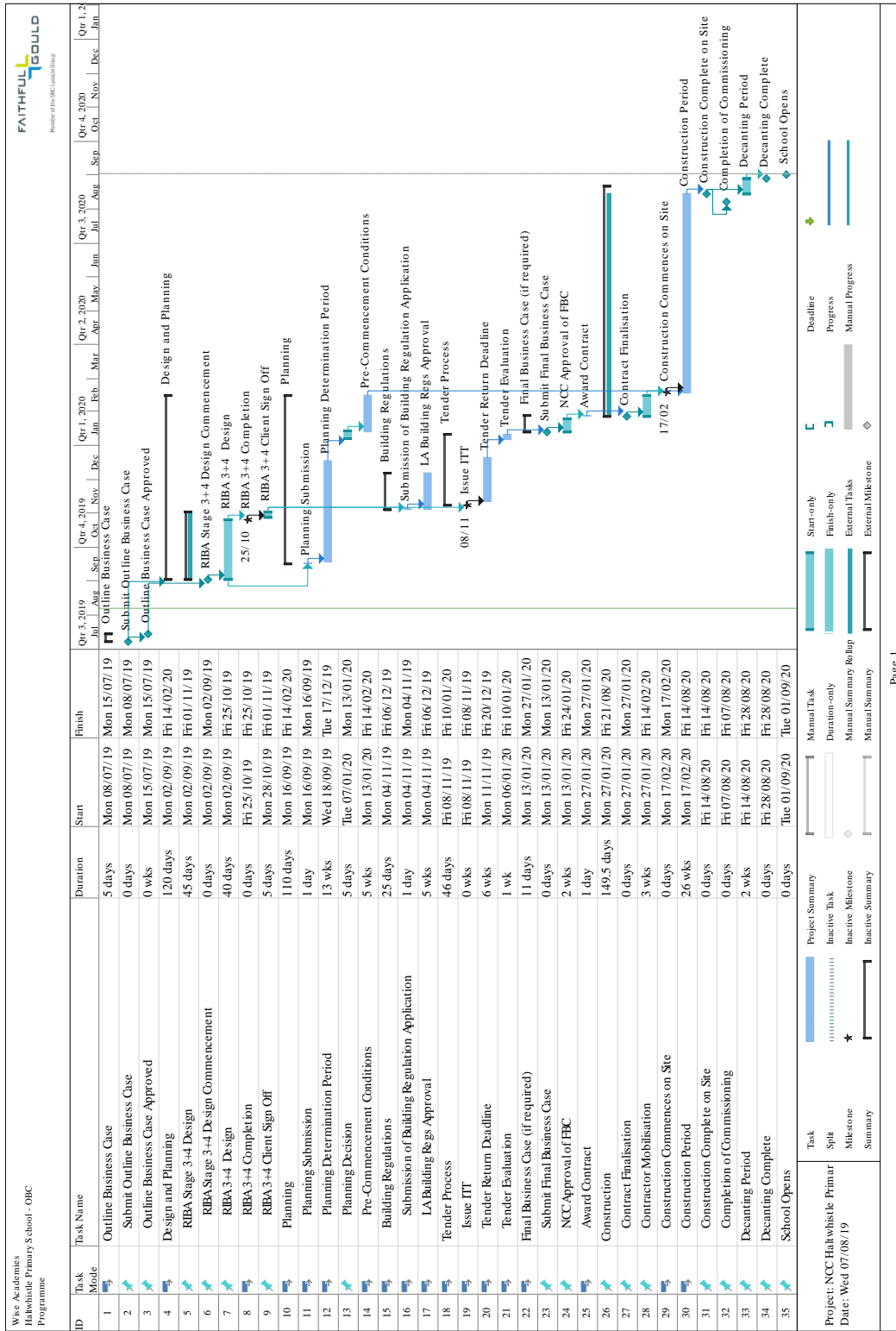
APPENDIX 1E

SCHEDULE OF ACCOMMODATION TOOL FOR ANY MAINSTREAM PRIMARY SCHOOL SoA tool 6.5N June 2016

date		age range		school name		as a check:				
17/5/19		3-11		HALTWHISTLE PRIMARY SCHOOL (NOR=315+39N)						
ADS code	45	1.5 FE	reception places	45	2	net capacity for SoA below = 315 within a potential range of: 283 to 315	type of school academy	net capacity for recommended SoA below: 315		
	90	30	infant places	90	3					
	180	30	nursery places	180	6		site: area (m ²)	type ample site		
	39	26	age 3-4 nursery places	39	11		retained buildings: type	none (all new)		
Total Mainstream Places				354	315	4 to 11 places	14 float if min net	not over min gross		
Additionally resourced FTE places for:							organisation options for:			
aged 2 to 3 nursery FTE							infant	classbases + shared teaching		
- SEN							junior	classbases + shared teaching		
max. group size								recommended area of space (m ²)		
average area of space (m ²)								no. of spaces		
TOTAL no. of spaces										
TOTAL AREA (m ²)										
SUPP AREA (m ²)										
Basic Teaching Area						(12)				
PRI03			nursery playroom	42	83	1	83	79 m2 or 2.3m2 per place min recom'd	83	1
PRI13			reception classroom	30	62	2	93	62 m2 minimum recommended	62	2
PRI22			classbase with sink (infant)	30	50	3	150	49 m2 open onto shared teaching	49	3
PRI26			shared teaching area without sink	13	26	2	52		39	1
PRI32			classbase without sink (junior)	30	50	6	300	49 m2 open onto shared teaching	49	6
PRI36			shared teaching area with sink	13	26	2	52		26	3
specialist practical/ other										
PRA11			food bay/ practical resources	8	20	1	20		10	1
-										
TOTAL AREA				min 720	max 822		750	OK: area within recommended range	744	
Large spaces: halls, studios and dining										
HAL13			main hall (primary) assembly max	290	150	1	150	dining options 60 mins all in main hall	150	1
HAL11			studio	30	55	1	55	80 m ² min recom'd for all pupils dining	55	1
			small hall	30	80				80	
-										
TOTAL AREA				min 195	max 235		205	OK: area within recommended range	205	
Learning Resource Areas										
LIB01			library	16	27	1	27	25 m ² minimum recommended	27	1
SEN11			SEN therapy/ MI room	5	12	1	12	12 m ² min recommended	12	1
SEN01			SEN resource base	5	12	1	12	group room suitable for SEN/ multi-agency	12	1
RES00			small group room	4	9	2	18		9	2
RES00			small group room (nursery)	4	9	1	9		9	1
-										
TOTAL AREA				min 45	max 101		78	OK: area within recommended range	78	
Staff and Administration Areas										
OFF31			staff room (prep and social)	22	41	1	41	41 m ² min total staff area recom'd	41	1
			staff work room	1	6				6	
ADM11			head's office (meeting room)	6	16	1	16		16	1
OFF10			office/ meeting room	3	9	1	9		9	1
OFF35			staff work room (with sink)	2	8	1	8	8 m ² recom'd for nursery incl kitchen	8	1
-										
ADM05			general office (1 recep desk)	4	20	1	20		20	1
ADM08			reprographics room	-	8	1	8		8	1
ADM01			entrance/ reception	-	4	1	4	net area of this space only	4	1
ADM02			interview room	4	6	1	6	adjacent to entrance/reception	6	1
ADM03			sick bay	2	4	1	4	semi-open area adjacent to reception	4	1
-										
TOTAL AREA				min 101	max 156		116	OK: area within recommended range	116	
Storage										
STT10			teaching store (off nursery)		4	2	8		4	2
STT10			teaching store (off reception)		3	2	4.5		3	2
STT10			teaching store (off infants and juniors)		1.5	9	13.5		1.5	9
			specialist store (food, sci, DT)		5				5	
STH00			PE store(s) (off hall)		15	1	15	15 m ² total recom'd	15	1
			PE store(s) (off small hall)		8			6 m ² total recom'd	8	
STH05			external PE store		4	1	4		4	1
non-teaching storage										
STH10			chair/ table store(s) (off hall)		10	1	10	10 m ² needed to store all chairs & tables	10	1
			secure/ exam/ archive store		8				4	
(CIR00)			wheelchair/ appliances bay(s)		1.5	2	3.0	wheelchair/ appliance bay(s) recommended	1.5	2
STN01			personal storage (coat hooks)		2.5	13	31.3	OK	2.5	13
STN31			cleaners store		1.5	2	3		1.5	2
STT10			general store (stock/ maintenance)		6	2	12		6	2
TOTAL AREA				min 73	max 129		104	OK: area within recommended range	104.25	
Float				min 0	max 133		13.75	NOTE: float available 14	19.75	
Total Net Area				min 1267	max 1372		1267	OK	1267	
Non-net Area								(pupil toilets: 20 recom'd 24 provided)		
KIT00/05			School kitchen prep & servery		55	1	55	55 m ² min recom'd for full service	55	1
TOC11			supervisable toilets (early yrs)	1	4	9	36	9 if 1 per 9.3 early years places	4	9
TOC13			other pupil toilet suite(s)	5	15	3	45	14 if 1 per 20 KS1 & 2 places	15	3
TOC03			hygiene room (shower & wc)	1	12	1	12	12 m ² minimum including hoist	9	1
TOC21			accessible/ staff toilet	1	3.5	3	10.5	also for visitors and staff	3.5	3
PLA01			plant indicative area, incl ICT hubs and risers		2.5%		28		32	2.5%
PLA02			server room		6	1	6	22.5% of net min circulation for 2 storeys	6	1
CIR01-02			circulation %age of net area for new build		22.3%		264		265	22.5%
			partitions %age of net area for new build		4.6%		58		58	4.6%
TOTAL AREA				min 528	max 570		515	ERROR: total area for category is too low	536.5	
Total Gross Area				min 1801	max 1993		1781.5	OK	1803.5	
Total Gross Area (including supplementary area)							1782	of which		retained, so: gross area to be built 1782 m ²
Gross area as proportion of net							141%			

APPENDIX 2:

APPENDIX 2A



APPENDIX 2B

APPENDIX 3:

APPENDIX 3A

APPENDIX 4:

APPENDIX 4A

**Education Vision and Design Brief
Haltwhistle Primary Academy**

This School-specific Brief is specific to Haltwhistle Academy.

Background

This school-specific brief sets out the specific requirements for the school to be known as Haltwhistle Primary Academy in Northumberland.

1. OVERARCHING REQUIREMENTS

1.1. Key Principles

The Contractor shall ensure that the design and construction of the School meets the five overarching outcomes listed:

- Health and Safety
- Functionality
- A standardised approach
- Future proofing
- Sustainable design and construction

The Contractor shall ensure that the School complies with the additional School requirements as set out in the paragraphs below.

Design and construction:

In relation to design/construction; the school is a key part of the community and a landmark building in the sense of the location it possesses and its visibility from the A69. It is also a key part of the NCC education proposals in the west of Northumberland – therefore this is a development of significant local interest. At the same time, the Trust is acutely aware of financial limitations linked to any redevelopment, and the need to prioritise providing suitable primary accommodation within the site. Therefore ideas linked to the internal design and related pedagogy have been shared throughout the document, and are based on meeting the needs of primary age pupils throughout. The main focus from a design/construction sense would be securing value for money and sustainability, while adhering to the latest building standards wherever possible for safety and functionality.

Future Proofing:

The 'school within a school' concept allows for flexible arrangements on each floor of the building. The needs of pupils can be met easily without compromising learning time. The majority of things a pupil can or may need are on one floor; we require a space for lessons, for collective worship in their 'mini-school' and so on. Toilet facilities should be provided on the same floor as classrooms. IT provision will be fluid, and can be used to meet the needs of the teacher or learner, rather than boxed away in an IT suite. Access to the internet is the same, wireless, and available wherever children need it; in the classroom, a shared space, or outside to enable their play. The rooms are fit for purpose; lots of natural light, ideally around 1000lux, room temperatures below 21c and ambient/background sound below 72 decibels - learning lessons from the past to improve the future.

Furniture is agile, storage built in where possible, allowing the framing and reframing of the classroom throughout the day as the teacher demands. Toilet facilities are singular, with enclosed hand basins, allowing pupils the privacy and dignity modern society demands. The needs of all pupils are met - rooms are accessible, user-friendly, and accessible toilets will exist on each floor. Accessibility is important going forward: pupils needs are met on different floors. Children aged 5-7 can only have their needs met on floor 001, 8 and upwards on floor 002. The building needs to support this for all pupils, whatever their specific needs.

The 'adult' element of the building is separate as far as possible; multi-agency meetings of various forms can take place without impacting on the education or safety of the children. The scope of this has changed dramatically over recent years, so making allowances for future changes in this area make sense. The necessary administrative functions of the building should all be concentrated on one area, allowing professionals and other adults to work together as required.

The needs of the community are considered too. The provision of playing fields with Sport England is supported through community changing facilities which can be accessed throughout the year as part of an existing tripartite agreement. Community use of the hall will be designed in, so it can continue to operate as the hub of the local community's drama or literary activities. Should the needs of the community change, it would be good if the school can adapt to meet the needs of the community.

Entry points to the school:

The school would like to provide multiple entrance points to ease the burden on the main entrance. This is to be considered carefully; it is our intention to provide direct access for younger children and their families via separate entrances and exits directly into Early Years classes on the ground floor. The current doors to the south of each lobby space could be used by children being taught on the first and second floors. A congregation area needs to be developed at the front of school as access to the playground at the rear will not be possible for parents. The vast majority of the children will be brought to and collected from school by parents/carers, different to the current usage. The entrance point to the site is proposed to be via one single entrance to the south of the driveway, adjacent to the caretaker's house.

1.2. Educational Drivers

1. Educational background and Context

The Contractor shall design the School to facilitate the provision of education in accordance with the Authority's Requirements to comply with the relevant needs of the cohort of Pupils and numbers of teaching and non-teaching staff to be funded and the unique ethos of the School as set out below.

2. School Ethos

The 'schools within schools' concept has been discussed above. The school has an inclusive ethos as evidenced by a range of local authority officers, and key to that will be providing the appropriate facilities as near to classrooms as possible. Our curriculum and teaching approaches are designed to establish a love of learning, encourage creativity and develop young enquiring minds, we have therefore retained spaces for the

arts, music and sporting participation. We equip our children with the essential skills to become successful learners for life. Reading is a priority and designated reading/library spaces will be created throughout school to raise literacy levels. Connection with our community is essential to make learning real, relevant and inspirational for our pupils. Communal spaces within each teaching hub will allow us to welcome visitors into school, in environments familiar to our children.

1. Curriculum and Organisation

The Contractor shall design the school to enable the curriculum to be delivered and the school to be organised to respond to the following specific school requirements:

- Curriculum

Our curriculum is designed around a two year rolling programme, each unit including a character education focus in order to broaden horizons and raise aspirations through an understanding of culture, community, careers and personal challenge through first hand experiences. Trust literacy and numeracy strategies ensure pupils are equipped with the essential skills for life. Opportunity to participate in wider enrichment activities is important to our school and our curriculum has been designed to engage learners in the arts (performance, art, music) alongside sporting participation.

- School Day

Doors open at 8.45, with registration starting at 8.50.

Morning lessons run from 9am – 12.10pm with a 15 minute break

Lunchtime is staggered between 11.45-1.30, to provide children with a meal and time outside while remaining in the necessary health and safety regulations (hall capacity etc).

Lessons continue in the afternoon, finishing at 3.15pm.

Our timetable is mirrored across the school each morning during 'reading teaching' to ensure any pupils who requires additional intervention and support to secure early reading skills are able to access this teaching at an appropriate level. Our refurbished school is designed to allow this flexibility for additional teaching groups during this time.

The school offers a wide range of after school extra-curricular activities and our spaces are used by much valued community groups, such as Brownies and Cubs into the evening.

- Student Numbers

The school should be designed to accommodate 315 pupils/one and a half form per year group. In Nursery, a maximum of 39 children will attend either the morning or afternoon session. It is not anticipated than any year group will increase beyond 45.

Projected numbers for September 2019 are:

Nursery (age 3+)	36 (plus Spring & Summer intakes)		
Reception	30	Year 4	38

Year 1	31	Year 5	42
Year 2	42	Year 6	44
Year 3	28		

- Teaching and Pedagogy

The Contractor shall ensure that the School is capable of meeting the following School-specific requirements in relation to Teaching and Pedagogy:

The school needs to be able to deliver the national curriculum. Pupils range from the age of 3 to 11. At school-level, teaching needs to meet various different requirements. There is the typical classroom requirement for children in KS1 and KS2, where lessons are teacher led, where children sit at tables and work collaboratively or independently to master skills in reading, writing, maths, or the wider curriculum. The school also needs to plan both space and curriculum provision for those children who need some personalisation – intervention, respite etc. The classrooms, or adjacent spaces, also need quiet spaces where groups of children can carry on a separate activity to the class, or to go and change reading books or practice their phonics one-to-one. Some ‘messy’ space would also be ideal; somewhere where art or DT lessons can be carried out, and mess easily cleaned up or cleared away – making the most of learning time in the traditional classroom.

There is also the need to provide facilities beyond the classroom – internal and external PE facilities for example.

Our youngest children have additional, different needs; they need greater space to be able to access continuous provision, and more ‘hands on’ learning activities. They also need access to the outdoors, where a large part of their curriculum is provided. Here they learn how to explore and discover, to practice their social and emotional development, to promote their physical development and to develop their understanding of the wider world.

2. Behaviour and Pastoral Care

The Contractor shall ensure that the School is capable of meeting the following School-specific requirements in relation to Behaviour and Pastoral Care:

We have adopted Restorative Practice techniques in order to manage the different behaviours at our school. Our designated Child and Family Worker takes the lead in this approach, however all members of staff in our new Primary will have received training and will be supported to implement these strategies. During less structured times of the day, the Child and Family Worker room becomes a reflection space, where children are able to reflect and learn from conflict situations or inappropriate decision-making. At other times of the day, this space is used to deliver a range of support for our children and their families: stay and play sessions, family / parenting workshops, support groups (eg looked-after child carer support). Child Protection meetings and multi-agency meetings will also be held in this space.

3. SEN and Disabilities

The Contractor shall ensure that the School is capable of meeting any School-specific requirements in relation to SEN and Disabilities:

A team of four practitioners, led by an experienced SENDCo manage our provision for pupils with additional needs. Suitable accommodation for meetings with parents and professionals is required. We have a significant concentration of speech, language and communication needs in particular disordered speech patterns; these require intensive speech therapy 3 times a week as recommended by SEND support service. In addition ASD and SEMH issues are prevalent which require quiet spaces offering a place for intervention or passive supervision. In addition, some pupils (mostly LAC) require calm, separate spaces for de-escalation and restorative intervention. Medical facilities are required to meet a range of current needs including oxygen storage and provision for children with epilepsy who require recovery space following seizures. In addition we have pupils with hearing, sight and mobility needs.

4. Health and Well-being

The Contractor shall ensure that the School is capable of meeting any School-specific requirements in relation to Health and Well-being:

Our intent is to implement a holistic whole school approach to delivering physical activity in line with the Chief Medical Officer's (CMO) recommendation of a minimum of 60 active minutes a day. Access to a dedicated sports hall and the facility to section part of the main hall for sports will help us to deliver this commitment during inclement conditions. Outside, our space needs to provide for the physical, social and emotional needs of our pupils.

We intend to develop the woodland which borders our site for a variety of uses. Designated areas to provide explorative and challenging physical play, alongside quieter spaces, offering Forest Schools teaching (with its well documented impact on SEMH, speech and language and environmental/cultural development). Our play spaces should be refreshed to facilitate active play suitable for Primary provision. A secure, accessible school field, enclosed within a boundary space (ie without a public footpath running through) would allow our pupils open access to safe large-scale physical play. A designated Early Years outdoor space is necessary to meet the curriculum requirements for this key stage. Pupils will need access to the Family Support Worker's reflection space during social times for pastoral support.

A large school kitchen is necessary, with sufficient storage and dining space to allow children the time to make healthy eating choices and enjoy this daily social event with friends without the need to rush our youngest children in order to deliver a full lunchtime service. The connectivity between this dining space and the playground is crucial to ensure safe lunchtimes and the maintenance of supervision ratios as pupils move between play and dining.

A medical space is required to provide any necessary first aid. Toilet provision is needed close to teaching areas and play areas.

3. BUILDINGS AND GROUNDS

2.1 Site Layout

The Contractor shall ensure that the following specific School requirements are taken into account in organising the design and layout of the site.

The site layout will remain largely unchanged. It would be preferable to make adjustments to the location of the site access from the public highway, removing the need for families to walk the steep hill to the school entrance. Or to ensure the public footpath doesn't affect the safety of pupils using the school site. Given both of these are fixed, it makes sense to retain the site as it is.

There will be an additional provision for an Early Years outdoor play area to be added to the site. The preferred location for this would be to the west elevation of the middle school, as this seems the most likely location for the Early Years classrooms.

The change of use to a primary setting also has implications for the external layout, and children being collected at the end of the school day. This needs to be to the south of the main building, as typically children would be collected from the school yard, which won't be accessible to parents/families.

The safety and welfare of all users is our primary driver. The need to provide security both inside and outside for our pupils wherever possible. The requirement to control access to the indoor environment through varying thresholds. The main entrance needs to be the focal point for visitors to the site, with necessary facilities adjacent as far as possible – a secure meeting room, holding area, toilet facilities.

2.2 Site Access

The school staffing profile will consist of 13 teachers and 31 non-teaching staff. Current parking is largely adequate. The location of the existing car parking spaces is suitable.

Early Years children require secure access via the front of school. Accessible, and a point of handover between families and their very young children. Access directly into classrooms for all pupils would be our preference, while we are aware this is unlikely to be possible given the nature of the three storey site.

Community facilities: able to be separated from the rest of the building to allow secure access outside of school hours, without risk to the school. If a Children's Centre is to be within the school perimeter, consideration to access without compromising children's safety must be considered.

The site in general is accessed from the south by a main access road which leads up the hill to the main entrance. There will be a significant change compared to the current use: the majority of pupils will walk with their families, greatly increasing the pedestrian traffic using the footpath up to school. Some families will use the public footpath joining the main road from the east – provision for this needs to be made too. The school

also require the site to be secure; perimeter fencing locations need to be agreed to match the proposed revisions to the red line drawing.

The potential increase in traffic needs consideration; the site was designed for pupils to walk to school alone. Families dropping children off/collecting from school could add traffic; a travel plan needs to be developed to manage the associated risk. The road in is single track, with a turning loop nearest the school entrance. This could be explored to provide a drop off point to reduce the amount of time traffic is on the school site and to provide safe access to the building for children being brought to school by bus for example.

One proposal for site access would be to locate vehicular gate and pedestrian gate adjacent to the current pedestrian crossing/caretakers house. This would allow access to the site at safe times by vehicle, and would allow pedestrian access as required. It would also allow continuous use of the public footpath nearby. All users would access the site via these gates, restricting access and reducing any risk to site users. The proposed fence to the EY front area would need to be extended to also include the doors at the base of stairwell 002 to secure the building itself.

2.3 Organisation and Layout

The school's preferred solution would be to organise the main teaching functions into the multi-storey area of the building. This would enable the school to provide a primary facility based on the 'schools within schools' approach. The ground floor would house the Early Years children. Both Nursery and Reception would have dedicated entrances to their cloakrooms and to intervention space. Both year groups would have direct access to a dedicated EY outdoor space, which would flow from the cloak and adjacent toilet facilities. Within the EY space would also be breakout spaces and kitchen facilities, enabling them to meet the needs of the EY framework.

Key Stage 1 would be housed on the first floor. This would access from the stairwells 001 and 002. There would be classrooms for younger pupils which would provide sufficient space for continuous provision to be provided. All classrooms would have access to a small multi-purpose/library space which would allow the classes on this floor to gather for collective worship/phase celebration assemblies etc. Providing toilet facilities on each lobby, and mobile coat racks to be then stored away would increase the amount of learning time and reduce any anti-social behaviour. There would also be provision for art/messy learning in the existing art room which the school would like to retain.

Key Stage 2 classes would be located on the top floor. These are the oldest children who should be able to cope with the transition up and down staircases frequently. On the top floor there will be classes for children from Y3-6, with the classrooms having the same features as on 001. Toilet facilities and cloaks etc will all be provided in the same manner as level 001. Again, this will maximise learning time through the use of nearby breakout spaces, toilets etc. Accessible toilets will be provided on each floor.

The ground floor lobby spaces will contain toilet facilities for the older children to access during break and lunchtimes. Also on the ground floor will be the staffroom and, if possible, attached PPA/work space. This can be within the secure zone or beyond. The secure zone should begin to the east of staircase 2.

Close to the main entrance, but outside the inner security, would be meeting rooms for parents, a room for any Family Support Worker to be based, and toilet facilities for school staff/visitors. This would enable the

vast majority of visitors to be retained in the first secure zone in school. Toilet provision within the main entrance area would also be an advantage as it would reduce the need for people to enter the main school building, increasing security. One inconvenience is the location of the hall, and its proximity to the main entrance. It would be preferable if the children did not have to go through the corridor near the entrance to go to PE/assemblies etc where visitors may be waiting. There are also existing changing rooms near to the sportshall. These need to be maintained as they provide part of the agreement with Sport England for community use of the playing field. Kitchen facilities are ideally located where they are presently, and it would be the school's preference for this to be retained.

2.4 Adjacencies

The Contractor shall design the Building to adhere to the School's relationships between different suites.

There would be four major areas:

- 1 – entrances to school
- 2 – separation of visitors and school children wherever possible
- 3 – hall connectivity
- 4 – EY and the outside area

1. Children need to be able to directly access their classrooms from the relevant entrance where possible. This is particularly important for EY children. This enables effective handover at the beginning and end of the school day. This handover between parents and children at the beginning and end of the school day is critical from a safeguarding perspective, and in building relationships with families. Trying to handover hundreds of pupils from one door at the end of the school day to the correct responsible adult is particularly difficult.

2 – Provision of facilities for visiting adults as near to the main entrance as possible would be beneficial from a safeguarding perspective.

3 – The hall is, in many ways, the hub of the school. Children will access it daily – for lunch, for PE, for assemblies. It's connectivity with the rest of school is really important – at the moment all 315 children would need to access the hall via one double door, adjacent to the main entrance. Access via some form of covered canopy/walkway across the yard could serve the dual purpose of being a walkway when weather conditions allowed, while also being some form of shelter for children outside at breaktime and lunch?

4 – It is necessary for the EY children to have free-flow access to the outdoors. The sensible location for this would be to the western boundary of the school building. There needs to be thought given to how the reception children could then access the area. This could be from the front of the building providing the area is secured, or from the rear (though this also provides design challenges due to the stairwell sending children out onto the playground in this direction).

2.5 Internal Space

Suites of Space

1. Classroom Suites (Primary and Special Schools)

Each classroom will be flexibly designed to allow multiple points of focus. This might be an interactive screen on one wall, or a large dry-wipe board/writable paint on another surface. These form the teaching points when a teacher is 'teaching from the front'. Built in storage would maximise the floorspace available for teaching. Due to the lack of room for cloakrooms, mobile storage solutions would also need to be 'parked' away behind some form of partition wall/false wall/cupboard front). Providing writable surfaces to the cupboard fronts would increase flexibility and enable the storage to double up as one of the focus walls. Network/power points within the storage/teaching wall would again increase flexibility and allow hardwiring of a teaching device. Power and data in the ceiling spaces would enable the school to make decisions as the project progresses around the decision to use interactive screens vs projectors as the main teaching focus.

2. The Hall, Performance and Dining Suite

The dining and kitchen facilities shall be suitable for the School's dining arrangements and dietary needs, as described in Educational Drivers.

The hall has three primary foci: a place for dining, for whole school gatherings and collective worship, and for community use. For dining, it needs to accommodate up to 150 children for 30 mins, three times in the middle of the day. Folding curtains create a fire barrier between the kitchen and main hall as well as a separate access corridor when the hall is in use. The folding curtains creating this divide require replacement. The bleacher seating and stage should be retained, for the added value they provide to both the school and the local community. Access directly into and out of the hall via the playground would be a significant improvement as it would reduce the pressure on the door directly opposite the main entrance at key periods. On occasions, the hall will be used as a low intensity space for PE – the floor would require some refurbishment to make this a safe space suitable for physical activity. Spaces currently utilised as PE storage should be re-purposed as peripatetic music teaching spaces.

The Administration Suite

The administrative area of the building needs to accommodate two members of staff. These need to be able to be the 'meet and greet' element of their role for visitors accessing the school. They also need to be able to control the security into the school, enabling people to cross the visitor thresholds. It's typical then for this to be located adjacent to the school's main entrance.

When not welcoming visitors, these staff need to be able to carry out their administrative role, some of which may be of a confidential nature. Therefore, they need a secure, space in which to work, once which provides desktop facilities, has secure access to the internet and to facilities such as photocopying. This can be a networked solution, but then consideration needs to be given to the location of the office in relation to the copier/printer central locations.

3. SEN and medical spaces

The school to describe their specific requirements for SEN and medical spaces

The school has children has 5 children with EHCP's who require low stimulus environments away from main teaching space, yet within a familiar and inclusive space. In addition we have a high number of pupils LAC whose SEMH needs also need to be met through pastoral spaces which provide a nurturing feel. Children

with a range of needs are within school who may require more specialist facilities, such as provision for oxygen, changing facilities and epilepsy and asthma management. Consideration needs to be given to children with mobility issues accessing the higher floors.

4. Storage

The school to describe their specific requirements for storage within the school

Much of the school's requirements can be met through the existing elements of the building. There will need to be a 'storage wall' within each classroom. This could form one 'teaching wall' within each classroom, should the door coverings be made from a writable material as described above. This will allow the storage of all classroom materials, children's books etc. One section of this could also be where mobile cloakrooms are stored when not in use. This would enable the school to maximise the available floorspace for teaching and learning.

5. Toilets

The school to describe their specific requirements for staff and pupil toilets

The school is happy to work within the appropriate building regulations. On Level 002, provision for 8 toilets would be required for the max 180 children using top floor at any one time. These need to be distributed on each landing to prevent children having to cross through any classroom. Any remaining (1/2no) would be located on the ground floor, adjacent to the school playground. The same solution is preferred for Level 001 – the difference here is that the typical number of pupils would be 90 with 120 maximum (30 older children using the art room for example). On the ground floor it would be preferable to have toilet facilities for the youngest children near their entrance and cloaks. This would ease transition into classrooms for both nursery and reception pupils, and would mean they can also access these toilets on their way in and out from the outdoor provision.

Staff toilets would be ideally placed between the teaching spaces and the administrative facilities.

Visitor toilet provision would be conveniently located between the different security thresholds – this would reduce the need to allow site access. Similarly, toilet facilities within the changing rooms would enable community use out of school operating hours without compromising security. Other community use would be typically centered around the hall, using whatever adult toilet facilities can be offered there.

6. Entrances and Circulation

The school to describe their specific requirements for all entrances, exits and circulation spaces

Accessibility and safeguarding two main considerations.

Stairwell externals to be Y1-6 Pupil entrances: directly into school via the staircase doors (staircase 1&2). Exit at the end of the day is the same.

Nursery/Reception: new entrances, directly into EY spaces, either side of staircase 1. Same exit points.

All other users (staff, visitors, late pupils, parents/carers etc) via the main entrance.

Only exception; community use of changing facilities. Direct access to circulation space behind main hall where changing provided.

The fire officer, building control and architects are best place to advise on fire risk and fire exits.

Circulation spaces; the school would like to minimise these in order to maximise usable floorspace. Critical therefore is the location of toilets adjacent to classrooms/stairwells. Other key consideration is the ground floor, and moving the existing circulation corridor to either the north or south of the building. This will enable the central space on Level 000 to be used for Reception classrooms, while also providing access to Nursery, located to the west elevation.

2.6 External Space: Grounds

Schedule of External Space

Security. Separation from site and public footpath is important to safeguard pupils adequately. This applies equally to any users of the Children's Centre which may be relocated. Consideration should be given to access via shared space at the site entrance, and the care home access required within the current boundary red line drawing. The Trust would also prefer the site not to be compromised by any relocation of the public footpath.

Outdoor provision for EY. One key building change is the extended age range of 3-5 year old pupils. This demands secure outdoor provision adjacent to the EY classrooms. There should be provision for fine and gross motor skills; mud kitchen, bike tracks, areas to promote physical activity such as slides, mounds and climbing apparatus, with surrounding safe floor surfaces. Awe and wonder/exploration – opportunities for this can be provided through caves, waterfalls, sand areas etc. Access to the natural environment should be made to facilitate the school's Forest School provision.

Allotment/green space for other pupils. Their needs are already largely met through the existing facilities to the north-west of the site. There does need to be some form of green space to relocate the existing allotment facility (which is anticipated will be the new location of the Early Years external space)

Congregation point/collection arrangements for families to the south of school. Another significant change in site use; families accessing the site to drop off/collect children. This will need to be managed very carefully, considering the families will be unable to access the rear of the north playgrounds. Appropriate congregation/collection space therefore needs to be provided near the south elevation -

Sport England facility: there is a tri-partite agreement between NCC, WISE and Sport England in relation to the playing field on site. Access to/from this needs to be allowed.

1. Informal and Social Areas

A playground space, where children can relax/congregate with their peers throughout the day. Otherwise limited to landscaping to the south elevation, primarily for users other than children (safe drop off/collection).

2. Sports facilities

The current middle school facilities are fit for purpose. The MUGA to the north playground provides appropriate outdoor PE provision, as does the yard in the event the MUGA is being used for invasion games such as hockey. The playing field provides the necessary soft surface for football/rugby/athletics. None of these facilities are available on the lower school site for example.

3. Drop-off and bus turn-around provision (Special Schools)

See earlier sections

4. Parking and Cycle Storage

The school to describe their specific requirements

The school has 13 full time teachers, 13 teaching assistants and 18 further support staff. The architect and NCC will determine the appropriate number of spaces required. The siting of the current car park is suitable. There is currently a cycle shelter at the front of the school although this requires replacement; the location/re-location of this needs to be considered with the required changes to the front of the building.

2.7 Safety and Security

This has been covered in the previous sections. The school requires site security around its perimeter. This needs to be discussed with NCC in relation to the proposed boundary changes. The Trust is unable to fence the existing red line boundary due to shared use of the driveway at its southern-most point, the location of the Children's Centre and the public footpath which runs to the south of the site.

There needs to be a solution which secures the main school and the playing field, while at the same time allowing access to the main entrance for visitors and for the mid-day changeover of pupils attending AM/PM Nursery. Any access to a relocated Children's Centre should also be considered.

Within the building, thresholds have been discussed with the architect. There needs to be access to the main entrance, and to the professional/visitor facilities beyond. There needs to be pupil security to the hall, and to the entire three storey building. Similarly, for EY pupils, there needs to be secure entry and connectivity to the EY outdoor area located on the western boundary.

Parent access at the end of the day needs to be facilitated via the pupil entrance/exits to the south elevation.

APPENDIX 4B

APPENDIX 4C

APPENDIX 4D

APPENDIX 4E