

**STOCKTON-ON-TEES
BUILDING SCHOOLS FOR THE FUTURE
OUTLINE BUSINESS CASE
VERSION 5
15 September 2009**

1 EXECUTIVE SUMMARY

1.1 Background

Stockton-on-Tees is an ambitious borough dedicated to promoting achievement and tackling disadvantage. Regeneration is central to the vision of the Council and its partners: renewing town centres, housing areas and community infrastructure; supporting the growing knowledge-based economy; and improving quality of life for our 189,000 residents. Building Schools for the Future is a key element in that regeneration strategy and is reflected in strategic plans at every level.

The theme of the BSF programme in Stockton-on-Tees is 'Campus Stockton' – a vision of transforming learning through a collegiate approach across the family of schools and colleges in the borough. In accordance with the strap line of the CYPP, "No Child Left Behind," the three key principles are:

- putting the learner first – personalised learning that meets individual needs in a diverse range of schools
- schools at the heart of the community – local bases for integrated service provision
- every school will be a good school – unique in ethos, culture and specialism, consistent in delivering high-quality outcomes for all.

Learners will be inspired and excited by learning, have open minds and wide horizons as ambitious and self-motivated members of the community. Learning will be creative, learner-led, and anytime/anyplace. Educational transformation will be linked with the ongoing development of four Integrated Service Areas (ISAs). These deliver community based education, health and social care services with a targeted, preventative focus on children and adults across the region.

The strategic objectives detailed in the Strategy for Change remain unchanged. Our key challenges are to:

- continue to raise achievement and address underperformance
- narrow the gaps in attainment particularly between areas of affluence and deprivation
- reorganise school provision to ensure that schools are of viable sizes appropriate to the demand for places
- increase diversity and opportunities for parental choice.

Since SfC2 approval, the scope of the Wave 6 project has, with the agreement of DCSF and Pfs, been extended by the addition of three schools, namely Northfield, St. Michael's RC, and St. Patrick's RC. This will enable whole-area solutions to be achieved in Billingham and Thornaby, and will support the creation of a three-school Roman Catholic federation.

1.2 The Project

Stockton-on-Tees Council will be procuring a Local Education Partnership (LEP) to deliver its BSF programme and to procure an integrated Managed Service to deliver Information and Communication Technology (ICT) to schools. Stockton-on-Tees's LEP will be given exclusivity to the provision of:

- Building Schools for the Future (BSF) funded capital works to schools within the BSF programme, all procured under Design and Build (D&B) contracts.
- Facilities management (FM) hard and reactive services for schools procured under the LEP.

- A Managed Service to deliver ICT to the schools within the BSF programme including those which are in a later wave and not currently subject to BSF funded capital works.
- In addition, the LEP may be invited to carry out additional services including capital new build works funded through the Primary Capital Programme, non BSF funded works on school sites and the provision of ICT services to primary schools. With respect to lifecycle works the LEP may also be invited to undertake these works subject to a specific value for money assessment.

The scope of Stockton-on-Tees's BSF programme comprises the remodelling and refurbishment of nine schools, a refresh at one school and two new build academies. All schools in the later wave, including a school recently rebuilt through PFI, will be drawn into the programme through the provision of an ICT Managed Service, which includes provision for Interim Services. Within the programme, there are two special schools, one providing residential respite care, and a pupil referral unit (Bishopton Centre).

Five changes have been made to the scope of works since the submission of the original SFC 2:

- Northfield School is now included in Wave 6 and will be a major remodel and partial new build;
- It is proposed to co-locate Westlands School on the Grangefield site. The school will occupy part of the Grangefield buildings and site which were not due to be retained. The existing building will be remodelled and extended to meet Westland's school vision;
- St Michael's is now included in wave 6 and will be a major remodel and new build occupying the former Billingham Campus site;
- St Patrick's is also now included in Wave 6 and will be a remodel of the existing school buildings. The vacated TCS building will be reused as temporary accommodation whilst St Patrick's is remodelled.
- The Bishopton Centre PRU will be relocated in to Wrensfield House (after remodelling works) which is next to the existing Bishopton Centre. It is a former education building, currently used as offices, but initially built as a school in circa 1970. It is a single storey L shaped building with a former Gym and Hall at opposite ends of the building, connected by a mix of medium to small rooms and ancillary spaces. During the design process it became clear that the existing premises could not be adapted to meet the school's vision. By utilising Wrensfield house this will mean that no new build is necessary, it will give the centre a gym and also provide a grassed playing area when the existing building has been demolished. Most importantly however, it meets the school's transformational vision.

A summary of the schools in the programme with current planned start and completion dates is set out in the table on the next page.

School	Proposed Capacity	Category	Build works	Construction	
				Start	Finish
Phase 1 sample schools					
Bishopsgarth	750 + 43 special unit	Community	remodel	02/05/11	01/03/13
Ian Ramsey	1050	Church of England VA	remodel	02/05/11	01/03/13
Phase 2 schools					
Academy in North Stockton	1050	Academy	new build	01/05/12	30/08/13
Abbey Hill	200 + 90 post-16	Community Special	refresh	01/05/12	01/01/13
Grangefield	1050	Community	remodel	01/05/12	03/01/14
Northfield	1200 + 10 special unit	Community	remodel	01/05/12	27/03/14
Academy in Thornaby	750	Academy	new build	01/05/12	30/08/13
Phase 3 schools					
Westlands	70	Community Special	remodel	03/01/14	27/03/15
Our Lady & St Bede's	750 + 35 special unit	Roman Catholic VA	remodel	01/05/13	27/03/15
Bishopton Centre	58	PRU	remodel	01/05/13	01/01/14
St Michael's	1050	Roman Catholic VA	remodel	27/03/14	30/11/15
St Patrick's	500	Roman Catholic VA	remodel	02/09/13	31/07/14
Schools to be closed					
Blakeston School					
The Norton School					
Billingham Campus School					
Thornaby Community School					
King Edwin Special School					

Key to geographical areas:

North Stockton	Central Stockton	Billingham	Thornaby
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1.3 Value for Money

The Council is committed to delivering its BSF Programme through a LEP. Following submission of a non-PFI Procurement Business Case it has been agreed with PFS that the BSF Programme will be delivered solely through Design & Build contracts. HM Guidance on Value for Money is not relevant for conventional D & B contracts. However, the Council is very conscious of the need to deliver VfM from these contracts.

The Council's Technical Advisers (AECOM) have undertaken detailed option appraisals in conjunction with stakeholders and these have then been refined to give costed control options. These control options deliver affordable solutions for schools. The cost estimates have been prepared using benchmarking data and appropriate indices.

The competitive procurement process is the vehicle for delivering VFM to the Council. Benchmarking data will be utilised together with whole life cost information and information on LEP related costs. The competitive process to procure the LEP will contribute to the demonstration of VFM. Throughout the procurement process the Council will ensure that the proposals put forward by Bidders are "on market".

A soft market testing day was held on the 25th June 2009 and this was attended by over 90 private sector representatives.

The Council's proposals for Facilities Management/Lifecycle Maintenance follow from a rigorous review of the options and benchmarking information available. The proposed level of spend is affordable and good value for money. The FM/Lifecycle arrangements will be subject to regular monitoring by the Council and this will include benchmarking of costs on a regular basis.

1.4 Affordability

The Council has assessed the affordability position for the overall BSF Programme; however, the Council recognises that this OBC will only authorise capital funding for sample schemes. The affordability of the capital build programme, the ICT requirements and the ongoing facilities management/lifecycle costs have been assessed separately as constituent elements of the overall affordability position.

The Council has also assessed the combined impact on its annual budgets of the procurement streams of the BSF Programme.

The PfS capital funding has been calculated in accordance with the PfS FAM Model and additional abnormal funding has been assessed and agreed with PfS. Following a rigorous options appraisal process, the agreed FAM funding envelope has been allocated to the individual projects in the Programme. An exercise has also been undertaken to assess the broad affordability position for a second BSF Wave in order to ensure that an affordable position can be reached across both BSF waves.

The proposals contained in the control options have been costed by the Council's Technical Advisers and these costs reflect the results of surveys undertaken. The Council believes that it has built up a robust affordability analysis of the D&B projects and fully understands the underlying costs and funding.

The Council currently estimates that the capital costs will exceed the available FAM funding by [REDACTED] and the Council intends to fund this shortfall through the use of capital receipts from surplus sites. The Council has taken a prudent approach to the valuation of the surplus sites and recognition has been made of the current economic climate. The Council has also considered the likely timing for the realisation of any capital receipts and the impact from a treasury management perspective.

It is the intention of both the Schools and the Council to ensure that the facilities developed under BSF are fully maintained over their design life. In summary, Fixed Annual Hard FM and Variable

Reactive Hard FM services will be provided by the LEP within the FM Contract. This service has been benchmarked at a cost of [REDACTED] and will be paid from school budgets.

A Lifecycle Sinking Fund will be set up within the Council's accounts to hold the required annual contributions in order to meet the anticipated lifecycle costs over 25 years. Schools will contribute [80%] of their future DFC funding and additional funding will come from centrally held DSG and LCVAP. The Council will then supplement this with significant agreed annual resources from the funding allocated in the Medium Term Financial Plan to BSF.

It is proposed to procure a LEP for the project and the Council intend to be a shareholder in the LEP in accordance with the provisions in the standard documentation from Pfs.

The Council has allocated significant funds to the BSF Programme, with an ongoing annual commitment of [REDACTED] per annum. The budget includes provision for the BSF Project Team and for the external Advisers. It also includes provision for resourceing of the LEP.

The Council's S151 Officer confirms that the Council's approach to managing the affordability of the BSF project, and the necessary contributions from the Council to meet these commitments, have been included in the Council's Medium Term Financial Strategy.

1.5 Readiness to Deliver

The BSF Project Board is the overarching body that oversees the work of the Project team. That body is chaired by the Council's Chief Executive and incorporates all of the Corporate Management Team (CMT) members, the Council's Cabinet Member for Children and Young People, Partnership for Schools, the LSC and a representative of the Secondary Headteachers and Principals group. All key decisions are channelled through the Project Board to CMT and then progressed to Cabinet for determination where appropriate.

The Council has established a BSF Project Team reporting to the Assistant Director/ Head of Children, Schools and Complex Needs. This BSF Project Team is part of the Children, Education and Social Care department of the Council and is led by a Project Director. Cabinet has provided delegated authority to the Assistant Director in conjunction with the Cabinet Member for Children and Young People for the operational running of the BSF programme. The Project Team has been established in dedicated accommodation providing offices, meeting rooms and secure data storage.

The PD has extensive experience in successfully delivering complex projects similar in nature to BSF, including substantial PFI experience. The PD is directly supported by two Project Managers, both experienced in dealing with complex procurements, a specialist in school organisation and pupil place planning, a dedicated Communications Officer and a team PA. Further recruitment of project assistants is planned to take place during the procurement and implementation phases of the programme.

The project team is further supported by a number of BSF Task Groups, each led by senior officers of the Council. These groups are able to draw on resources from within their departments to assist in dealing with their strands of the workload. The whole of this BSF extended team is supported by external advisers: AECOM dealing with Technical, Design, Cost and ICT; Grant Thornton dealing with Financial and Dickinson Dees dealing with legal matters. Education advice and support is provided by the Council's Education Improvement Service within which a dedicated officer has been allocated to work on BSF.

Stockton-on-Tees has embedded a strong focus on Educational Transformation and Managing Change so that improvement of educational outcomes can be assured. A Client Design Adviser (CDA) has been appointed and is working with the core team and with all schools to ensure that control options and later Bidders' proposals are robust and will deliver the Council's requirements.

Funding for external consultants has been allocated up to Financial close and the formation of the LEP. Funding has been reserved to enable advisers and in-house support to be available during the construction and operational phases of the programme.

The team maintains close liaison with PfS project directors and advisers in the ICT, PE and Sport, Design, Technical and Commercial strands of the programme. Equally 4Ps provides help, advice and support in Gateway Reviews and through the North East BSF network. Our relationship with the Office of the Schools Commissioner is good. Two academy projects have progressed to the Expression of Interest stage with the expectation of moving quickly into feasibility. We have allocated one of our project managers to concentrate on the academies strand of the programme.

The Council has allocated a base budget of [REDACTED], plus a year by year allocation of [REDACTED] to support project development and delivery. The management of this budget is allocated to the PD in conjunction with finance officers.

The Project Team will maintain continuity throughout the programme. Further to OBC approval it is intended that the same team will progress with procuring the LEP partner and overseeing the construction phases. An adjusted team will then take on the long-term commitment of managing the operational phase in conjunction with the LEP.

A Change Management Group (CMG) was formed in order to engage key stakeholders in delivering Sfc2 and has continued to work with the core team to deliver the OBC. That group is formed from representatives of all secondary schools and colleges in the borough including headteachers and schools' appointed BSF leads. The group meets every two weeks. All schools are involved in this process even though some of the schools are not in Wave 6. The Stockton-on-Tees family of schools works in a co-operative and collaborative way and all headteachers agreed that all schools be included in the CMG's work. Chairs of Governors and Senior Leadership Team members are invited to CMG meetings where appropriate. All special schools and the PRU are included in this group. Schools have participated in an intensive programme of workshops on a range of subjects, including ICT, Facilities Management, Change Management and PE and Sport.

All Wave 6 schools have developed their Individual School Strategy for Change (ISSfC). These have enabled architects working with our Technical Advisers to develop control options for all schools in Wave 6. Control options have been used as the basis for consultation with Planning Officers; this has resulted in the Council's Planning Committee having approved development briefs for the two sample schools and planners have provided letters of comfort for each of the other schools in the Wave. Bidders will be required to make application for planning approval at each site. Highways officers have also been consulted and their requirements have been included in the control option details. Transport assessments have been carried out on sites where it was deemed necessary to verify feasibility.

All necessary survey work has been carried out and where necessary warranted. A full land title and ownership audit of all sites has been completed and proves that the Council is clear of any major encumbrances that might have affected progress.

Throughout the process of developing control options, architects and designers have been mindful of the requirements of the relevant building bulletins and requirements of building and planning

control matters. The Council's CABE enabler and the Design Manager for PfS have been involved in the control option processes.

A programme of school organisational change is currently in progress. The closure of one school has already been completed and the students and staff merged with a nearby school, initially operating on two sites but eventually under BSF remodelling to be a single site location. Further closures will be processed during the autumn of 2009 to enable the establishment of two academies, initially to operate in the existing premises of three predecessor schools. Decant of both academies into new premises will take place once building works have been completed. The three Roman Catholic VA schools in the borough have commenced the process of creating a Hard Federation. This was a requirement of Sfc2 approval and is progressing well with supportive public meetings having been completed. A hard federation has been established across the Special Schools, with re-organisation leading to the closure of King Edwin.

Schools in Wave 6 have all signed formal letters of commitment and those schools in the 'follow on wave' have signed a letter of support. These have been approved by governing Bodies and signed by each of the Headteachers and Chairs of Governing Bodies.

Outline Business Case to Financial Close	
Draft OBC completed	04/09/09
OBC submitted to Project Board	07/09/09
OBC submitted to CMT	09/09/09
Gateway Review	23 - 25/09/09
Cabinet Approval	01/10/09
Submit OBC to PfS	05/10/09
PfS Approval	13/11/09
OJEU	16/11/09
PQQ	16/11/09 – 15/01/10
Issue IPD phase 1 (3No Bidders)	22/01/10
Issue IPD phase 2 (2 No Bidders)	11/06/10
Confirm selected Bidder	10/12/10
Planning	13/12/10 – 25/03/11
Financial Close	22/04/11
Construction	
Phase 1	
Ian Ramsey CE School	02/05/2011 – 01/03/2013
Bishopsgarth School	02/05/2011 – 01/03/2013
Phase 2	
Academy in North Stockton	01/05/2012 – 30/08/2013
Academy in Thornaby	01/05/2012 – 30/08/2013
Grangefield School	01/05/2012 – 03/01/2014
Abbey Hill School and Technology College	01/05/2012 – 01/01/2013
Northfield School and Sports College	01/05/2012 – 27/03/2014

Phase 3	
Westlands School	03/01/2014 – 27/03/2015
Our Lady and Saint Bede's RC School	01/05/2013 – 27/03/2015
Bishopton Centre	01/05/2013 – 01/01/2014
St Patrick's RC School	02/09/2013 – 31/07/2014
St Michael's RC School	27/04/2014 – 30/11/2015

1.6 Leading and Managing Change

The successful implementation of Campus Stockton requires a process of sustained change in working practices, structures and behaviours over a significant period of time. Key elements of the change management strategy are:

- a shared vision and effective collaboration to ensure genuine transformation of learning for all children and young people in the borough;
- implementing system leadership – shared responsibility for improving all schools across Campus Stockton to the level of the best;
- comprehensive, high quality professional development to secure the transformation of pedagogy, practice and curriculum;
- maintaining a clear focus on inclusion and SEN, and on maintaining standards through a period of transition;
- ensuring that schools engage with developments in ICT;
- quality assurance processes and a common framework to evaluate the quality of change management at school level

Responsibility for leading this process lies with our BSF Change Management Group (all secondary headteachers, college principals and key officers of the Council). The LA has appointed a BSF Change Manager, and all Wave 6 schools have nominated members of their leadership teams to lead transformational thinking in school, to represent their school at vision-to-reality meetings with external advisers and governors, and to lead change management programmes in their own schools.

We recognise the implications of BSF for staff employed in schools or by contracting organisations providing services to schools. Our Human Resources Service has developed a staffing protocol which deals with the range of HR issues that will arise under the change programme. It provides a structured procedure for appointment to the new schools and for TUPE transfer where appropriate. A senior HR Officer is seconded to the BSF team to ensure effective practices are implemented.

1.7 Issues arising from Strategy for Change Part 2

Approval was given to Sfc2 on condition that the following issues are addressed in OBC:

An assurance that the proposed federation of the three Roman Catholic schools is agreed, and the timeline for implementation	The governing bodies of the three Roman Catholic secondary schools issued in June 2009 a formal proposal to form a hard governance federation to be implemented from January 2010. Consultation on that proposal has ended on 8 September. The three governing bodies will meet on 10 September and intend to announce
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	their final decision on 14 September.
Confirmation that the Thornaby Academy will be procured as early as possible through the LEP as part of the Wave 6 project, and the timeline for doing so	The new build for the Academy in Thornaby would be part of Phase 2 of our construction programme, and would commence in May 2012, with a planned completion in August 2013. In order to effect change at Thornaby Community School as quickly as possible the Academy would initially open within the existing predecessor schools in September 2010. This means that the step change that is needed would not be constrained by our BSF build programme.
Plans for developing collaboration between the Academy and St Patrick's with a view to maximising the offer to pupils in the area	The ISSfC for St. Patrick's includes this statement as a key opportunity under BSF on page 3: 'Being involved with the early stages of planning for the Academy as the vision and future curriculum are developed gives the opportunity for strong collaboration particularly for the expressive arts and sport.' St. Patrick's Governing Body has confirmed (July 2009) that they are looking forward to working with the University and the co-sponsors to develop a vision for the proposed Academy in Thornaby.
Details of how post-16 provision in Stockton will be kept under scrutiny to ensure that the delivery (used as justification for 11-16 Academies) matches expectation	Currently the scrutiny of post 16 delivery is under the aegis of the LSC. Appropriate shadowing procedures are in place for handing over the process to LA commissioning in 2010. There is a strong 14-19 Partnership with wide provider representation and an Executive Steering Group. (See OBC section 2.2.3)

A range of other issues was appended to the SfC2 approval letter:

1. Evidence of greater synergy between ISSfCs, change management strategy and school design. The change management strategy should: <ul style="list-style-type: none"> • Be clear about which aspects of the strategy are priorities for action • describe what kind of responses are needed • put the LA in the key role of coordinating delivery of it 	Since SfC Part 2, the Council's Principle Adviser, (Education Vision Consultant and Change Manager) has, with the Council's Technical Advisers, worked intensively with all the schools. They have used as a baseline the feedback from PfS after SfC part 2, informal feedback from PfS, and a school self evaluation tool developed from PfS criteria. (See OBC section 2.3 and 3.1)
2. Demonstrate the role of the Academies in commissioning and governance of 14-19 provision across the borough	There are two co-sponsors for both Academies. One is the Stockton FE. College Consortium: a strategic partnership formed by Stockton Sixth Form College and Stockton Riverside College, each of which has proven high quality post-16 expertise and provision. They bring considerable and complementary experience to support the 14-19 progression pathways of the academy's

	<p>students, including promoting opportunities for higher education. In 2005, both Stockton colleges embarked on a strategic initiative to act collaboratively and this memorandum of understanding has recently been strengthened so that the colleges jointly agree on the provision of courses to the 14-16 age group as part of their commitment to 'Campus Stockton' as well as agreeing on delivery of post 16 learning to avoid duplication and fragmentation.</p> <p>The other academy co-sponsor is Stockton-on-Tees Local Authority. The inclusion of the Local Authority as a co-sponsor reflects the firm commitment of the sponsors to develop an academy which fully exploits the freedom of the Academies' framework whilst remaining a full and active member of the Stockton family of schools expressed through the concept of 'Campus Stockton'. Both colleges are active members of 'Campus Stockton' and the 14-19 Partnership.</p> <p>As part of personalisation for both academies, the curriculum offer would include applied learning programmes and access to the diplomas available across 'Campus Stockton'. The strong 14-19 Partnership across the Borough means that there are already centrally managed transport arrangements and timetabling developments which would ensure easy access to the Borough-wide offer for Academy students. As the academies develop their specialisms they will then contribute to diploma delivery across the family of schools.</p>
<p>3. Demonstrate the extent to which the educational strategy for 14-19 and the underpinning demand projections for each pathway/diploma will result in an appropriate enhancement to the facilities that will be required at each school</p>	<p>As part of the 14-19 Partnership, specialist facilities for construction, hair and beauty and engineering will be provided by colleges or training providers both pre-and post 16. For the general learning part of the diplomas and for diplomas such as business and finance and society, health and development, the new flexible learning spaces and enhanced ICT provision planned in each ISSfC will ensure suitable learning provision for diploma delivery.</p> <p>Both specialist sports colleges are playing a lead role in developing the Sport and Active Leisure diploma and the Borough-wide PE strategy will ensure enhanced provision to meet the demand.</p>

<p>4. Provide greater clarity around developing provision for ASD students. Sfc2 makes reference to two further schools developing provision. It is not clear whether these are in Wave 6 or the later Wave</p>	<p>For ASD students, Special School provision is at Abbey Hill. A 35 place ASD unit has been established at Our Lady and Saint Bede's and this features in their ISSfC as an area for transformation through BSF. For students with physical disabilities there will be re-modelled provision at Bishopsgarth School. All 3 schools are in Wave 6.</p>
<p>5. Demonstrate the means by which students in the PRU will access a broad and balanced curriculum, with links to specialist facilities and offsite vocational/work-based learning</p>	<p>The Bishopton Centre was inspected in April 2009 and was judged to be good. The Ofsted report stated, 'The curriculum for pupils in Years 4-6 and in Years 7-9 is well balanced and matched appropriately to learning styles and needs' and that 'Year 10 and 11 pupils have an outstanding range of opportunities to develop skills off-site, with training providers or at local colleges. These courses all lead to nationally approved qualifications.'</p> <p>Building on this strong foundation, the ISSfC for the PRU is focused on improving the outcomes for the learners they serve through greater personalisation. There will be improved vocational provision on site particularly food and design technology so that learners can cook the food they grow and develop applied learning skills by manufacturing and designing small scale projects. As the learners are from statistically less healthy backgrounds this will contribute to their well-being and will also be linked to team working, research and the development of PLTS.</p> <p>As recognised by Ofsted, the wide range of opportunities for off site learning with access to specialist facilities will be sustained.</p>
<p>6. Reach agreement with Pfs about the inclusion or otherwise of PFI within the scope of the LEP procurement</p>	<p>A non-PFI justification paper was submitted to Pfs in July 2009, we have been advised that the paper will form part of the OBC evaluation. We were advised that Pfs's early review of our submission expects it to be acceptable.</p>
<p>7. Reach final agreement with DCSF/Pfs about the schools included within Wave 6</p>	<p>Further to our submission to include St. Patrick's and St. Michael's schools into wave 6 we received a formal letter of approval from DCSF on 4th August 2009.</p>
<p>8. Demonstrate in the control option drawings how the key priorities identified for extended school, integrated services and PE & sport will be realised through BSF</p>	<p>In each individual school's control option, we detail the key priorities for extended schools, integrated services and PE & Sport.</p>
<p>9. Describe how the aspirations and needs described in Sfc2 will be met</p>	<p>Reshaping secondary education around the concept of 'Campus Stockton', BSF will meet the aspirations and needs described in SFC2.</p>

	<p>Our aspirations are:</p> <ul style="list-style-type: none">• putting the learner first – through personalised learning that meets individual needs in a diverse range of schools• schools at the heart of the community – local bases for integrated service provision• every school a good school – unique in ethos and specialism, consistent in delivering high-quality outcomes for all. <p>Our needs, as outlined in SfC2 are:</p> <ul style="list-style-type: none">• continuing to raise achievement and address underperformance• narrowing gaps in attainment particularly between areas of affluence and deprivation• reorganising school provision to ensure that schools are of viable sizes appropriate to the demand for places• increase diversity and opportunities for parental choice. <p>BSF investment will achieve this by enabling schools to put the learner first. Across all Wave 6 schools BSF will secure embedded personalised learning so that the curriculum is configured around the learner with innovative Quality First pedagogy supported by new technologies. A shared focus on inclusion, achieved through the concept of 'Campus Stockton', will support our more vulnerable learners within mainstream settings where there will be appropriate specialist facilities, skilled staff and new technology to motivate them for success and secure progression. The needs of our most vulnerable learners, who require the support of PRU and special school settings, will be met in remodelled environments that include spaces for therapeutic interventions, access to specialist vocational provision across 'Campus Stockton' and integrated service support work with families.</p> <p>With the addition of three more schools in Wave 6 an enlarged Northfield (following the closure of Billingham Campus School) St. Michael's and St. Patrick's, whole-area solutions can now be</p>
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	<p>achieved for Billingham, Stockton-on-Tees and Thornaby. The federation of the three Roman Catholic schools of Our Lady and St. Bede's, St. Michael's and St. Patrick's will address a specific issue in the SfC2 as well as improving choice, diversity and access for students and their parents across the borough. This will achieve the aspiration of schools at the heart of the community.</p> <p>Through BSF every school will be a good school as the planned re-organisation will address the polarisation that is developing between areas of affluence and deprivation. New build academies will offer a vibrant learning environment for communities in the most deprived areas of the borough. A hard Federation of Catholic schools will secure a coherent curriculum offer across all three schools as well as new models of leadership. Such re-organisation will improve outcomes for all learners.</p>
<p>10. Demonstrate the alignment of ICT investment strategy with the extended schools-integrated services action plan</p>	<p>The ICT investment strategy will support sharing information across multiple sites; tracking progress and attendance both in individual schools and when students are accessing flexible learning opportunities such as 14-19 curriculum opportunities or a period of intervention at the Bishopton Centre. The ability to meet key ECM outcomes will be enhanced by this well-managed ICT service as links are made to the wider Children's Services agenda. Promoting the 'team around the child' through access for multi-agencies to high quality real or pseudo real-time information for key children's services professionals will enhance Extended Schools and Integrated Services delivery. Systems developments will be around Contact Point and the eCAF. This will also enhance safeguarding arrangements and child protection requirements across Campus Stockton.</p> <p>The provision of real-time reporting to Parents will enhance the involvement of Parents/Carers in their children's education.</p> <p>The BSF ICT investment will also facilitate and enhance the delivery of community access. See OBC Section 3.4 and ICT Output Specification.</p>
<p>11. Provide greater detail about the LA's risk management process</p>	<p>Risk identification is a specific responsibility for the Project Board and Project Team members as set out in the terms of reference although anyone involved in the project can identify risks.</p>

	<p>The project maintains a comprehensive risk register based on a four stage risk management process to identify, evaluate the initial risk, agree actions to mitigate the risk, monitor and review the residual risks.</p> <p>Risks have been identified on an ongoing basis throughout the project. Risk workshops have been held at the outset of each project stage with the wider project team, external Advisers and the Change Management Group. Work stream leads are nominated risk owners with the Project Manager retaining the overall responsibility. Risks are reviewed on an on-going basis with any changes in status reported to the Project Manager and the BSF Project Director at regular intervals including monthly team meetings. Where necessary, project management escalates the high level risks to the Project Board, sets out the impact of these risks and the proposed actions for consideration.</p>
<p>12. Further develop ISSfCs, particularly the sample schools</p>	<p>From the time that the Sfc2 was submitted and supported by our educational consultants and the BSF Change Manager, schools have carried out reviews of their ISSfC taking cognisance of feedback from PfS to further develop the strategy. New ISSfCs have been added in for schools that have been added to Wave 6</p>
<p>13. Demonstrate alignment of the ICT strategy & investment with 14-19 plans</p>	<p>The embedded use of ICT will give 14-19 continuity by providing access to a variety of pathways from 14, utilising multi-site and virtual models of studying.</p> <p>The ICT strategy and investment are aligned with the main objectives of the 14-19 strategy:-</p> <ul style="list-style-type: none"> a) supporting the development of appropriate learning, training and employment pathways by developing shared MIS, supporting the dissemination of effective practice, improving participation of Parents/Carers and increasing the capacity to deliver broad 14-19 pathways. b) facilitation of high quality teaching and learning through personalised learning, common monitoring, assessment and reporting structures and the encouragement of student voice. c) ensuring that all young people have access to a wide range of learner support via common / interoperable structures. <p>See OBC section 3.4 and ICT Output Specification.</p>

<p>14. Demonstrate alignment of ICT strategy & investment with plans for development of integrated children’s services and community development, inclusive teaching and learning, and workforce remodelling & CPD</p>	<p>Promoting the ‘team around the child’ through access for multi-agencies to high quality real or pseudo real-time information for key children’s services professionals will enhance Extended Schools and Integrated Services delivery. Systems developments will be around Contact Point and the eCAF. Development of systems, policy and protocols will be carried out with the involvement of wider children’s services to ensure that the integrity and security of existing systems is maintained. The ICT Strategy is based on ensuring that the innovative use of ICT will transform teaching and learning. See OBC section 3.4 and ICT Output Specification. BSF investment in ICT will be supported by rigorous change management process to address workforce remodelling and CPD needs.</p>
<p>15. Present an affordable project based on current location factor and underwritten by letters of support as set out in PFS guidance, one which continues to meet educational objectives as set out in SfC2</p>	<p>See OBC section 5 SBC’s section 151 officer has agreed that the project is affordable (see section 151 letter). All current factors have been considered in that decision. Educational objectives as set out in the SfC2 have been at the forefront of determining the affordability.</p>
<p>16. Obtain PFS/DCSF agreement to a case for retention of 100% of capital receipts</p>	<p>A paper has been submitted to PFS requesting the retention of 100% of all Capital Receipts that may be generated through the BSF programme. The paper sets out the reasons for the request and is expected to be evaluated along with the OBC.</p>
<p>17. Section 3.6.6 of SfC2 states that “the FAM indicates an initial ICT capital investment of [REDACTED],” whereas the FAM provided shows ICT funding of [REDACTED]. Please confirm the correct level of ICT funding</p>	<p>The correct level of funding is [REDACTED], however this now takes into account the inclusion of 3 additional schools, Northfield, St Michael’s and St Patrick’s.</p>
<p>18. The pupil numbers in the FAM do not correspond with those in Appendix 7, and some schools included in the FAM are not included in the analysis in Appendix 7. Please confirm that the pupil numbers included in the FAM are the correct pupil numbers and that they are based on the pupil projections for each school in 2017-18</p>	<p>OBC section 2.2.2 includes a table setting out the proposed post-BSF capacity of each school (including the three schools added to Wave 6) and the projected numbers of pupils on roll in 2017-18. These are based on projections supplied by Tees Valley Joint Strategy Unit. The revised Wave 6 FAM including the three additional schools is based on the same projections. The FAM includes base allocations for two of the three schools planned for closure.</p>

2 BACKGROUND

2.1 Corporate Vision

Stockton-on-Tees is a diverse borough with a thriving population of more than 189,000 people in a mixture of urban centres, market towns and rural villages. The borough has areas of acute deprivation alongside areas of real affluence. Using the Index of Multiple Deprivation, 40 of our 117 Super Output Areas are among the worst 20% nationally and 20 are within the most deprived 10%. Since its establishment as a unitary authority in 1996, the Council has formed highly effective partnerships with public and private sector bodies to stimulate the economic and physical regeneration of the borough and the Tees Valley city region. The Audit Commission has named Stockton-on-Tees Council as one of the highest performing councils in each of the last six years. The Council and its partners in the local strategic partnership *Renaissance* are committed to economic regeneration through redeveloping town centres, improving transport and increasing the number and quality of jobs available in the borough, and to improving quality of life by regenerating local communities and providing opportunities and services for individuals. Their long-term vision is of “promoting achievement and tackling disadvantage.” The important contribution of Building Schools for the Future towards achieving that vision is reflected in strategic plans at every level.

The Stockton-on-Tees Sustainable Community Strategy 2008-2021 describes the long-term vision of *Renaissance* under key themes including Children and Young People, Health & Wellbeing, Economic Regeneration & Transport, and Safer Communities. The Council Plan 2008-2011 is a three-year business plan that sets out detailed objectives for each key theme and describes the Council’s contribution to achieving them. Planning for BSF is named as a priority activity under all four of these themes. The Children and Young People’s Plan (CYPP) 2009-2012 identifies key priorities under the five Every Child Matters (ECM) outcomes. The Enjoy and Achieve section sets out ambitious targets for improving attainment, access, participation, inclusion, progression, curriculum flexibility and enrichment across all phases of education. Progress against these targets is reported in the annual CYPP Review and in regular Corporate Management Team (CMT) performance clinics. The CYPP explicitly embraces the opportunities presented by BSF to transform learning, improve student and community engagement and create improved learning environments, and the CYPP Action Plan includes BSF milestones (SfC, OBC) as key activities.

Education vision

The theme of the BSF programme in Stockton-on-Tees is Campus Stockton – a vision of transforming learning through a collegiate approach across the family of schools and colleges in the borough. In accordance with the strap line of the CYPP, “No Child Left Behind,” the three key principles are:

- putting the learner first – personalised learning that meets individual needs in a diverse range of schools
- schools at the heart of the community – local bases for integrated service provision
- every school will be a good school – unique in ethos, culture and specialism, consistent in delivering high-quality outcomes for all.

The goal is that learners will be inspired and excited by learning, have open minds and wide horizons as ambitious and self-motivated members of the community. They will be happy, employable and safe. In their futures they will be good colleagues, partners, parents and citizens. Learning will be creative and learner-led, not instructional and teacher-led, anytime/anyplace rather than location-specific, and based on multi-channel experiences facilitated by portable online devices. Educational transformation will be linked with the ongoing development of four Integrated Service Areas (ISAs).

These deliver community based education, health and social care services with a targeted, preventative focus on children and adults across the region.

Confirmation of consistency with Sfc2

This Outline Business Case fully reflects the key strategic objectives detailed in the Strategy for Change. Our key challenges are to:

- continue to raise achievement and address underperformance
- narrow the gaps in attainment particularly between areas of affluence and deprivation
- reorganise school provision to ensure that schools are of viable sizes appropriate to the demand for places
- increase diversity and opportunities for parental choice.

Since Sfc2, the scope of the Wave 6 project has been extended by the addition of three schools. The rationale for these changes is as follows.

Northfield School

The three schools in the Billingham area of the borough were not originally included in the Wave 6 project. Falling student numbers had brought the sustainability of Billingham Campus School (in special measures) into question. Following statutory consultation, the Council approved a proposal to close Billingham Campus School and enlarge Northfield School (outstanding at its last Ofsted inspection) to encompass the site, buildings, students and staff of Billingham Campus. The proposal stated that Northfield would continue to operate on both sites until BSF funding became available to support consolidation in remodelled buildings on a single site. The Council made a successful case for Northfield to be brought into Wave 6 on the grounds that earlier inclusion in BSF will shorten the period of split-site operation and give students earlier access to wider curriculum opportunities and extended school facilities in enhanced premises. This move would also permit an earlier transfer for St Michael's RC School to the Billingham Campus site. The inclusion of Northfield School in Wave 6 was confirmed by DCSF in a letter dated 28 April 2009.

St Michael's RC Comprehensive School

The Council's strategy for Billingham is that the enlarged Northfield School will be remodelled for 1,200 places (plus a special unit for up to 10 students with visual impairment), and St Michael's RC Comprehensive School will be transferred to the former Billingham Campus site and enlarged from 875 to 1,050 places. Those additional places will be needed to meet demand when Northfield reverts to single-site operation. Without the enlargement of St Michael's (originally expected in the second Wave of funding) it is likely that Billingham would have insufficient places overall. The Council made a successful case for St Michael's to be brought into Wave 6 to enable a whole-area solution to be delivered for Billingham in a single Wave. Renewing St Michael's in Wave 6 will also strengthen the proposed three-school Roman Catholic federation, thereby addressing a specific issue in the Sfc2 approval letter. The inclusion of St Michael's RC School in Wave 6 was confirmed by DCSF in a letter dated 4 August 2009.

St Patrick's RC Comprehensive School

The Council made a similar case to bring St Patrick's RC Comprehensive School into Wave 6 (i.e. on grounds of both geography and diversity). It will greatly enhance the prospects of a successful RC federation if all three schools benefit from BSF funding in the same Wave. St Patrick's is located in Thornaby adjacent to the proposed Thornaby Academy. The inclusion of St Patrick's (500 places) in

the same Wave as the Academy (750 places) will protect the smaller school against student drift to the new-build Academy as well as facilitating collaboration between the schools (another specific requirement in the Sfc2 approval letter). The inclusion of St Patrick's RC School in Wave 6 was confirmed by DCSF in a letter dated 4 August 2009.

These changes mean that whole-area solutions can now be achieved in Wave 6 for Billingham, Stockton-on-Tees and Thornaby, and for the special schools that serve the borough.

Current and post-BSF attainment

	Current attainment			Post-BSF target		
	5 A*-Cs or equivalent including English and maths 2008	CVA KS2-KS3 2007	CVA KS2-KS4 2008	5 A*-Cs or equivalent including English and maths	CVA KS2-KS3	CVA KS2-KS4
Bishopsgarth	31%	99.5	1024.9	58%	upper quartile	upper quartile
Blakeston	22%	99.1	999.8	proposed for closure		
The Norton	8%	100.1	998.2	proposed for closure		
Academy in North Stockton				46%	upper quartile	upper quartile
Ian Ramsey Church of England VA	61%	98.5	989.9	76%	upper quartile	upper quartile
Our Lady & St Bede's Roman Catholic VA	51%	100.5	1004.5	70%	upper quartile	upper quartile
Grangefield	50%	99.2	1005	65%	upper quartile	upper quartile
Northfield	48%	99.2	1006.2	65%	upper quartile	upper quartile
St Michael's Roman Catholic VA	63%	99.4	991	81%	upper quartile	upper quartile
Thornaby Community School	9%	98.4	962.6	proposed for closure		
Academy in Thornaby				48%	upper quartile	upper quartile
St Patrick's Roman Catholic VA	67%	99.0	975.4	85%	upper quartile	upper quartile
Abbey Hill	0.0%	99.5	1000.8		upper quartile	upper quartile
Westlands	0.0%	102.3	-		upper quartile	upper quartile
King Edwin	0.0%	101.9	963.9	proposed for closure		
Bishopton Centre	N/A	N/A	N/A		N/A	N/A

Key to geographical areas:

North Stockton	Central Stockton	Billingham	Thornaby
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2.2 Strategic Overview

BSF is a once in a lifetime investment opportunity to reshape secondary education in Stockton-on-Tees and ensure that 'No Child is Left Behind'. For leaders in schools and the Council, there is a shared imperative to ensure that all learners are given the right opportunities to succeed by making the outcomes for every child everyone's responsibility. BSF investment means that this will be achieved in inspiring twenty-first century learning environments through a tailored curriculum that meets the changing needs and aspirations of young people and where there is a personalised approach to learning supported by new technologies.

One of the key strategic objectives detailed in the Strategy for Change is to continue to raise achievement and address underperformance. Using the performance measure at the end of Key Stage 4 of 5+A*-C with English and mathematics, performance in Stockton-on-Tees has improved in the last four years from being below the national average of 45% in 2005 to being above the national average in 2008. At the level 2 threshold of 5+A*-C, there has been a rising trend in performance which has narrowed the gap from 5% below the national average of 49% in 2000 to 1% below the national average of 65% last year. In 2008, the KS2-4 CVA scores at most schools in the group were close to or above the norm. Exceptions to this were Ian Ramsey Church of England VA, St. Patrick's Catholic VA, Thornaby Community School and Billingham Campus School.

At Key Stage 3, the attainment gap between Stockton-on-Tees and the national average has been closed and in 2008, standards at the end of KS3 exceeded the national average in English, mathematics and science at level 5+ and level 6+. However, over time progress for our students from Key Stage 2-3, as measured by Fischer Family Trust, has been significantly below where it is expected to be. Analysis by our MIS service has drawn attention to underachievement among students of Pakistani heritage.

What the improvement headlines mask by averaging out the performance across all schools in Stockton-on-Tees is the difference in attainment between areas of affluence and those of deprivation. The Ofsted results do highlight the polarisation that is developing between the eight schools that have been judged good or outstanding and those facing improvement challenges resulting either in Ofsted judgements of satisfactory or, where overall effectiveness has been found to be inadequate, being placed in special measures.

Three Wave 6 schools (Blakeston, The Norton and Thornaby Community School) have faced particular challenges. They serve areas of social and economic deprivation where student intakes have higher than average levels of entitlement to free school meals and there are more students with learning difficulties or disabilities than is found in other schools in the borough. These factors contribute to low levels of attainment, and post-16 staying on rates are lower than in other parts of the borough, particularly progression into full-time education. Performance at GCSE (5+A*-C including English and mathematics) has been below the threshold of 30% for the last four years in each of these schools. In 2008 performance at this indicator was 22% at Blakeston, 8% at The Norton and 9% at Thornaby Community School. All three schools are supported by the National Challenge. Attendance levels at all three schools are below both the national and borough averages and have been over time.

Recent Ofsted Section 5 inspections have judged two schools in Wave 6 as outstanding (Abbey Hill and Northfield) and six as good (Ian Ramsey Church of England VA, Bishopsgarth, Grangefield, Our Lady and St. Bede's Catholic VA, St. Michael's Catholic VA and Bishopton Centre Pupil Referral Unit). Four of our schools have been judged as satisfactory (St. Patrick's Catholic VA, Blakeston, The Norton and Westlands). Two schools, Thornaby Community School and Billingham Campus, are subject to

special measures. The Wave 6 group includes four persistent absence schools (Blakeston, The Norton, Thornaby Community School, and Grangefield). Behaviour in all schools has been judged as satisfactory, good or outstanding.

What will BSF bring?

By transforming learning across Stockton-on-Tees, BSF is integral to the ambition for the regeneration of the borough. 117 Super Output Areas are in the 20% of the most deprived nationally and the Wave 6 BSF area includes the most deprived wards in the borough. Four of these are regeneration zones subject to very significant investment in renewed housing and community infrastructure.

The aim is that every school should be a good school and through the BSF programme we will make organisational changes to raise standards for all students but particularly those from disadvantaged backgrounds. Subject to statutory consultation we plan to close three schools (Blakeston, The Norton and Thornaby Community School) and replace them with two new-build academies. Falling student numbers have brought the sustainability of the Billingham Campus (in special measures) into question and it will close in the summer of 2009 with the enlargement of Northfield School encompassing its students, staff and site. Finally there will be a hard federation across the borough's three Roman Catholic secondary schools.

Many families in Stockton-on-Tees's communities need help to access support services and the new and remodelled schools as well as acting as focal points for learning will build on the extended schools provision providing access to co-located integrated services for children and adults linked to the Council's ISA developments.

As part of the Change Management process, we are developing system leadership across all schools in the borough regardless of BSF phase. This can best be described as a system where all school leaders are as concerned about the success of other schools in the borough as they are about their own. BSF is acting as a driver to securing and sustaining educational transformation with leaders both in schools and in the Council working closely as part of Campus Stockton, taking responsibility for the outcomes of all learners not just those in their own schools.

By working collaboratively with schools as part of the process of Change Management, the Council has developed a borough-wide personalised learning strategy. ISSFCs show that schools are familiar with the key characteristics of personalised learning and this is at varying stages of development across schools. BSF is adding value by encouraging schools across Campus Stockton to take a highly structured and responsive approach to personalising every young person's learning as they develop their change management strategies. Collaborative learning opportunities such as Change Management meetings, meetings of deputies and vice principals at either the Enjoy and Achieve Group or the Curriculum Progression Group and collaborative CPD days facilitate the sharing of good practice across the network of schools of Campus Stockton. The Council BSF team and members of the Education Improvement Service will challenge schools to embrace change by fully implementing their ISSFC so that they embed high quality teaching and learning, supported by new technologies, and configure the curriculum around the needs and personal learning preferences of the learners.

To be successful, personalised learning needs to be supported by extensive use of ICT to ensure improved performance for all learners. By developing staff to be expert facilitators who can harness the full potential of new technology, learners will be engaged by a curriculum that motivates them and encourages self-directed learning. Effective use of ICT will ensure that all learners are provided with a common experience in terms of access to their data, applications and files regardless of the school they are working in at a particular time. ICT will also play a key role in increasing and

improving parent and carer involvement in learning. Closer partnership working with families facilitated by new technologies will mean shared responsibility for the outcomes learners achieve and this will play an important part in narrowing attainment gaps. Through creative and social interaction, new technologies will contribute to raising aspirations for learners as well as supporting progression into further education and training and then onto successful employment.

To support personalised learning effectively, the Council has worked with its schools and other stakeholders to develop an Educational ICT strategy around '12 big ideas' (see section 3.4 below). This strategy ensures that the most will be made of new technology provided by BSF investment. A Campus Stockton approach will mean that BSF ICT funding will increase and improve ICT provision at the point of learning to address inequalities of provision and performance so that all young people in Stockton-on-Tees have the opportunity to be successful. An ICT Managed Service that has commitment from Wave 6 schools as well as support from later wave schools to enter into Interim Services, which will bring efficiencies and economies of scale. System capability will be enhanced so that key school, Council and national priorities can be realised. All schools have engaged with the eight elements of the Becta Self Review Framework (SRF) and have a realistic view of their areas of strength and weakness. This means that the substantial ICT investment can be tailored to local school and learner need.

An ICT Managed Service will support sharing information across multiple sites; tracking progress and attendance both in individual schools and when students are accessing flexible learning opportunities such as 14-19 curriculum opportunities or a period of intervention at the Bishopton Centre. The ability to meet key ECM outcomes will be enhanced by this well-managed ICT service as links are made to the wider Children's Services agenda. We will promote the 'team around the child' through access for multi-agencies to high quality real or pseudo real-time information for key children's services professionals. Systems developments will be around Contact Point and the eCAF. This will also enhance safeguarding arrangements and child protection requirements across Campus Stockton.

Key performance indicators

To secure the project's key educational transformational objectives the three key principles are:

- putting the learner first – personalised learning that meets individual needs in a diverse range of schools
- schools at the heart of the community – local bases for integrated service provision
- every school will be a good school – unique in ethos, culture and specialism, consistent in delivering high-quality outcomes for all.

Underpinning these principles is a commitment that the BSF programme will ensure that the five outcomes of the Every Child Matters agenda are met so that every learner:

- is safe;
- is healthy;
- enjoys and achieves;
- makes a positive contribution;
- achieves economic well-being.

The KPIs are focused on the strategic objectives of raising standards and achievement, narrowing attainment gaps as well as targeting underachieving groups, improving attendance and progression for students across into work or further/higher education and training.

The principal KPIs are:

- increase in the % of students achieving 5+ A*-Cs or equivalent with English and maths
- improve performance at GCSE by students of Pakistani heritage
- improve performance at Key Stage 3 and reduce variation between schools
- narrow the achievement gap between students eligible for free school meals and their peers at Key Stage 4
- reduce the proportion of 16-18 year olds who are NEET
- reduce the % of persistent absence in the secondary sector
- increase the % of schools graded good or outstanding at Ofsted inspection.
- all new school buildings to meet DCSF carbon reduction targets
- all students to be offered five hours of PE or sport per week
- all students aged 14+ to have access to all Diploma lines by 2013

These are consistent with KPIs in the CYPP and Local Area Agreement (LAA) and have been agreed with schools and colleges. Targets for the impact of BSF on each school are outlined in the Schools Chart in paragraph 2.1 above.

2.2.1 Access, Diversity and Choice

Reshaping secondary education around the concept of Campus Stockton BSF will improve choice, diversity and access for students and their parents. Whilst learners and their parents will identify with the unique ethos and culture of their individual home institution they will have an entitlement to access the learning within and beyond the classroom in the right place and time for them across Campus Stockton.

The BSF programme will provide structural solutions to address the effects of disadvantage on the outcomes for learners. The three schools supported by the National Challenge will be replaced by two academies (subject to statutory consultation). The National Strategies feedback on the National Challenge Plan commented 'there are clear structural solutions proposed for the high risk schools which seem appropriate from the evidence presented.'

Parents and carers in these areas of deprivation will see Academies at the heart of their communities offering rich and diverse learning opportunities so that learners are inspired and excited by learning in an environment that promotes their health and well-being. Gaps in achievement will be closed and learners in these areas will become healthy members of their community with transferable skills that will secure them future employment in Teesside and beyond.

Currently we have Ministerial approval for the Expressions of Interest for both Academies and are progressing into the Feasibility stage. Our model of Academy development with a lead sponsor and with the Council and a consortium of Stockton-on-Tees colleges as co-sponsors will integrate the Academies fully into Campus Stockton. The proposals are as follows:

- Blakeston School and The Norton School are proposed for closure and replacement by a new-build 11-16 Academy with 1,050 places, excluding 40 post 16 places, on the Tilery site. This academy will develop a science specialism, supported by a strong health and well-being theme. This Academy will have NHS Stockton-on-Tees as its lead sponsor, with the Council, Stockton Riverside College and Stockton Sixth Form College as co-sponsors. The schools are proposed to close in December 2010, with the new Academy opening in the predecessor schools' existing buildings in January 2011. The Academy will then move into a new build in September 2013.

- Thornaby Community School is proposed for closure and replacement by a new-build 11-16 academy with 750 places, excluding 40 post 16 places, on its own site. This academy will specialise in business and enterprise, supported by a strong digital creativity. This Academy will have Teesside University as its lead sponsor, with the Council, Stockton Riverside College and Stockton Sixth Form College as co-sponsors. The school is proposed for closure in August 2010, with the new Academy opening in the predecessor school's existing buildings in September 2010. The Academy will then move into a new build in September 2013.

Statutory consultation is already under way to create a hard federation of the three Roman Catholic schools, Our Lady and St. Bede's RC VA, St. Michael's RC VA and St. Patrick's RC VA. Working together to one single Governing Body from January 2010, the aim is that the federation will strengthen Catholic education within the Borough of Stockton-on-Tees, supporting diversity and choice. It will also provide a coherent curriculum across the three schools, increasing the opportunities for individual students, extending curriculum entitlement and offering opportunities for staff to share expertise and experiences.

2.2.2 Priorities

SfC2 set out in detail the pupil place planning methodology used by the independent Tees Valley Joint Strategy Unit. Projections for the Wave 6 schools indicate a need for 7,906 11-16 places (including students in special units) in 2018. The projects proposed in this OBC will provide a total of 8,150 places including special units. This will allow a margin of 3% surplus places.

School Name	Proposed capacity	NOR 11-16	NOR Post-16
Bishopsgarth	750 + 43 special unit	702	0
Academy in North Stockton	1,050	1,050	40
Ian Ramsey Church of England VA	1,050	974	0
Our Lady & St Bede's Catholic VA	750 + 35 special unit	674	0
Grangefield	1,050	974	0
Northfield	1200 + 10 special unit	1,107	0
St Michael's Roman Catholic VA	1,050	1,040	
Academy in Thornaby	750	750	40
St Patrick's Roman Catholic VA	500	500	
Mainstream totals	8,150 + 88 special units	7,771	80
Abbey Hill	200 + 90 post-16	200	90
Westlands	70	70	0
King Edwin	to be closed	-	-
Bishopton Centre	58	58	0
Special school totals	328 + 90 post-16	328	90

Key to geographical areas:

North Stockton	Central Stockton	Thornaby	Billingham
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A significant reduction is projected in the number of post-16 places required in future. A total of 1,904 16-year-olds will enter the post-16 system in 2018 compared with 2,453 in 2008. The current strategy of the 14-19 Partnership is to secure a total of 4,080 places across two academies, two mainstream schools, one special school, two FE colleges and a variety of work-based training providers. BSF combined with LSC investment of [£78 million] since 2003 will ensure that a renewed

estate will meet the needs of all these young people. 170 of these places will be provided through BSF Wave 6 and 450 in a later Wave. This strategy was endorsed by the local LSC in a letter dated 16 February 2009.

	Planned places 2018
Stockton Sixth Form College	800
Bede Sixth Form College/ Stockton Riverside	2,080
Eggescliffe School	250
Conyers School	200
Academy in North Stockton	40
Academy in Thornaby	40
Abbey Hill / Westlands Federation	70
Work Based Learning 16-18 Starts	450
E2E	150
Total Places Years 12/13	4,080

A reduction is also projected in the need for places in special schools as a result of the delegation of funding to mainstream schools to support inclusive practice. A total of 328 11-16 and 70 post-16 places will be provided. These figures include 58 11-16 places at the pupil referral unit.

Underperforming schools

The Council's aspiration is for all schools to be good schools consistently delivering the highest quality education. With BSF as a driver, system leadership is starting to foster a culture of interdependent accountability for the outcomes of all students across Campus Stockton. In July 2009, school and college leaders agreed to look at models of Education Improvement Partnerships through the autumn term 2009 to make arrangements and accountabilities for system leadership more explicit. From September 2009, all leaders have agreed to scrutinise borough-wide results to identify underachieving groups or subjects and to develop improvement strategies collaboratively, either in groups of schools or supported by the Council. School leaders are developing a higher level of concern for system-wide success for all learners.

Recognising the responsibility contained in the Statutory Guidance on Schools Causing Concern (September 2008), which reflects the changes in the Education and Inspections Act 2006, we revised our Schools Causing Concern Procedures during the summer term of 2009. This has strengthened the principle of intervention in inverse proportion to success so that Council resources are more effectively aligned to need. To ensure effective categorisation of schools we have adopted a red/amber/green categorisation system in line with several national programmes for school improvement. The aim is to identify improvement needs swiftly and to act decisively to address underperformance. As part of system leadership, we are also encouraging schools that are categorised as green to share good practice across the family of schools and to support underperforming schools. Following consultation with key stakeholders including schools, School and Governor Support Service and School improvement Partners (SIPs) during June and July 2009, this key Council policy document will be included in the Education Improvement Service handbook which will be available online for all members of the Education Improvement Service, schools and SIPs.

The Council recognises that there may be a number of reasons for underperformance which can occur gradually over a period of time or, in extreme cases, very rapidly. The Council will continue to take a proactive role in monitoring and challenging schools to improve by using the full range of

available information including feedback from SIPs. The Council uses its best endeavours to work in close partnership with schools to address underperformance. Decisive action is taken to safeguard the education and life chances of children and young people as evidenced by the decision to close Billingham Campus School.

The SIP function and Single Conversation add value to our partnership with schools. National Strategies graded our SIP arrangements as “good”. “The service provides excellent support and challenge to schools.” (SIPCO, February 2008). In the spring of 2009, the Education Improvement Service was re-organised with the four Principal Adviser roles aligned to the four key Council duties of monitoring and evaluation, providing challenge through effective deployment and performance management of SIPs, targeting intervention and support for improvement.

We recognise that there is underachievement in some schools. Supported by our MIS service, the Principal Adviser (Monitoring and Evaluation) analyses performance into specific issues; this could be performance across a whole key stage in the Council or variations in group performance. This data analysis together with data from SIPs informs the process of intervention so that remedial action is taken where there are risks to the outcomes for learners. The role of the Principal Adviser (Intervention) is to lead and manage intervention and targeted work for schools causing concern across the borough. We have a “Virtual School” to track the progress of our most vulnerable students (e.g. Looked After Children) and we share a SEN monitoring service with our partners in Darlington Council. The BSF ICT Managed Service will secure a managed and high quality integrated tracking and assessment system to monitor the progress of cohorts and individual students. We will ensure that protocols unify the system which will be supported with agreement on a common data set of national and agreed standards that will then be applied across all schools.

Four schools in the borough have consistently underperformed and have greater than 25% surplus places. Three will be replaced by academies and Billingham Campus School will close in September 2009.

2.2.3 Level 4 and Beyond

A strong 14-19 Partnership meets regularly to develop and implement strategy for 14-19 provision. The Partnership comprises schools, Stockton Riverside College and Stockton Sixth Form College, two local universities, training and work-based learning providers, the LSC and the Council (including Connexions). Through this 14-19 Partnership there is a shared understanding that no single institution can deliver 14-19 entitlement alone and institutions must collaborate to effectively personalise learning for each individual student across Campus Stockton. We have seen significant changes in the depth of collaboration as a direct consequence of the 14-19 reforms and the implications for delivering the 2013 Entitlement.

The Partnership’s representative Executive Steering Group provides the strategic vision and direction of travel and ensures access for all. This includes the development of management structures and collaborative 14-19 planning and curriculum development including the full range of learning opportunities including diplomas, apprenticeships, the foundation learning tier, GCSEs, vocational and work related learning. As part of ensuring support for more vulnerable learners, there is a strong working relationship with the NEET Strategy team. Working to the strategic plan, the Curriculum Progression Group puts into operation agreements on curriculum, timetabling, transport and quality assurance protocols, and monitors targets and outcomes. This group includes partners from training agencies, LSC, Connexions and colleges, and diploma leads.

The diploma lines that are being developed draw on the expertise and facilities of colleges, schools, Academies, employers and training providers. Each diploma line is led by a senior leader from

schools or colleges in the partnership, building on their expertise learned through curriculum development and the increased flexibility programme. Diploma lines in Creative and Media and Information Technology are offered from September 2009. Further Diplomas to be offered in 2010 include Engineering, Construction and the Built Environment, Hair and Beauty, Sport and Active Leisure and Society, Health and Development.

As part of personalisation, the curriculum offer in the Academies would include applied learning programmes and access to the diplomas available across 'Campus Stockton'. There would be collaboration for 14-19 curriculum opportunities across the family of schools and Academies which would be enhanced by the expertise of NHS Stockton-on-Tees and Teesside University.

In both Academies, a 'studio approach' would be adopted supported by team teaching from both Academy and college staff and this would mean that Academy staff could gain experience of teaching post 16 courses. Gifted and talented Academy students would be able to access level 3 courses such as A/S early, secure in the knowledge that this would be part of a viable progression pathway into college and then higher education. For more vulnerable Academy students at risk of becoming NEET there would be opportunities to continue with aspects of applied learning until they gain appropriate qualifications and confidence to make the transition to college or further training.

Transition post-16 will be managed by strengthening the Associate Student scheme which operates across the borough now. All KS4 students are made associate students of Stockton Sixth Form and Riverside colleges, with guaranteed places on transition for all students including those from the Academies. Effective Information, Advice and Guidance (IAG) together with a web-based common prospectus and common application process to all post-16 provision across the borough and sub-region supports all students to make a seamless transition to appropriate provision. Enhanced ICT provision in schools as part of BSF will add value to this. As co-sponsors to both academies, the consortium of Stockton-on-Tees colleges will bring strong and consistent focus on continuing education and training post-16 to Campus Stockton. This will be directly through sponsorship of each academy with the promotion of progression in these areas where participation in further education is lower than the borough average and by continued commitment to system leadership across Campus Stockton. This is explored further in section 7.

LSC involvement in the BSF Project Board ensures joint strategic planning, and alignment of BSF and LSC resources to maximise value for money across the 14-19 phase. LSC investment of [£78 million] since 2003 has improved post-16 facilities significantly. This includes a new-build Bede Sixth Form College on the Billingham site due to open in September 2009. BSF investment will ensure that accommodation and facilities in schools match the commitment and skills of staff and the aspirations of students across Campus Stockton.

The 2008 merger of Bede College (satisfactory at its last inspection) with the beacon status Riverside College is contributing to further raising standards in the 14-19 phase of education.

The newly formed 14-19 Strategic Planning group will inform Council commissioning of provision on transfer of responsibility from the LSC to Council in 2010.

2.2.4 Extended Services

Stockton-on-Tees's extended schools programme has successfully engaged schools in the delivery of extended services through five extended school clusters of primary and secondary schools. Each cluster is geographically aligned to the Integrated Service Areas (ISAs) and supported by an Extended Schools Co-ordinator, whose role is to liaise with schools and organisations, and co-ordinate the development of extended services as part of a locality-based multi-agency team. In accordance with Government policy, the Extended Schools strategy encourages and supports each individual school in its aspirations to deliver the full core offer of extended services. However, individual schools are

not expected to provide these services alone, or necessarily to deliver them on their own school site, but they are expected to contribute to the extended services agenda by working in partnership with other schools, agencies and organisations.

Each cluster includes up to three secondary schools, all delivering extended services beyond the requirements of the extended schools core offer. The BSF strategy builds on this provision by increasing the capacity of secondary schools to offer services outside the school day and to the whole community. These are supported by local primary schools within the cluster working together to produce a coherent and joined-up package of extended provision which can be accessed through each individual school and the cluster as a whole. The Integrated Service Areas (ISAs) will create centres of extended provision in each cluster area, linked to each other and to the local primary schools. This concentration of resources will provide hubs of extended provision available throughout the year and accessed through individual schools, enabling sustainable core offer delivery across the Borough.

Stockton-on-Tees schools have taken full advantage of the opportunities provided under the Parent Support Adviser (PSA) initiative which has resulted in the appointment of 21 full-time equivalent workers to support parents, children and schools in the parenting aspects of children's education. This project ensures that PSA support is available in all schools within the borough and programmes are actively developed to engage parents and families with their local school. Although the PSAs will be employed within the schools, they will work as part of the Targeted Services multi-agency teams within each ISA. This will further develop and reinforce the linkages between not only the parents and the schools, but also the agencies responsible for the delivery of services. In addition, the PSAs and Extended Schools Co-ordinators will also develop the local networks with other agencies and providers to enable the schools to work as partners within their local community, implementing one of the key principles of BSF, 'Schools at the heart of the community'.

In summer 2009 the Extended Schools Co-ordinators were transferred into the locality-based Targeted Services teams in each of the ISAs, providing a management structure between extended schools, Parent Support Advisers and ISAs. They will continue to support the area school clusters to provide the forum in which the effectiveness of the programme can be monitored and assessed, and further linkages with the BSF programme can be developed. Stockton-on-Tees's extended schools programme ensures that all schools within the borough will provide access to the full core offer of extended services by April 2010 including parenting support, swift and easy access community access, childcare and a varied menu of activities.

Revenue funding for the extended schools programme has been made available from the Standards Fund Grant which is allocated from 2008 to 2011 as follows:

	2008-2009 £	2009-2010 £	2010-2011 £	TOTAL £
START UP – allocation within the Area based grant	401,796	718,988	295,678	1,416,462
SURE START EARLY YEARS CHILDCARE GRANT (SSEYCG)	295,057	Included in the above	Included in the above	295,057
SUSTAINABILITY – includes element for Parent Support Advisers	290,135	530,927	748,034	1,569,096
TOTAL	986,988	1,249,915	1,043,712	3,280,615

In addition, a total of [£840,040] capital funding has been made available from 2008-2011, with which to support capital works and equipment for the delivery of extended services within schools. The fund is operated in close liaison with the Primary Capital and Childcare Quality and Access

Capital programmes. The funding will be used to establish facilities within the Council's Integrated Service Areas (ISAs) from which extended schools support can be directed to schools. It is not intended that this funding will be used to enhance BSF premises. It will be able to support schools in terms of equipment and buying in specific expertise.

The schools have included proposals for extended services in their individual Strategies for Change. Within each site the schools are seeking central heart spaces which will become a welcoming focus for the community and extended services use of the buildings. BSF will enable this priority to be achieved, and will also provide high quality learning, specialist, performance, catering and social spaces which will in turn be attractive to potential user groups and individuals.

The schools will enable pupils and families to access a wider range of learning, sporting and leisure activities through Campus Stockton: at cluster level, and for minority or specialised interests at the Borough wide level. This access will be made possible with the BSF ICT innovation. The Catholic Federation of schools will also provide a co-ordinated range of extended schools activities and services across the three schools.

BSF will enable schools to provide better facilities and ICT solutions for multi agency partnership working, bringing a reality to the 'team around the child'. The schools are aiming to provide these services outside as well as within the school day, so that families can have ready access when they need it.

The schools have formally agreed that the Change Management Group will co-ordinate specialist Sport and PE provision across Campus Stockton, together with the Colleges and the Borough's Leisure Officers, to ensure as wide a range of activities as possible is available to all the Borough's pupils. To this end the details of the facilities on each site above the core provision have been jointly planned. ICT will facilitate access to the full Borough wide menu of opportunities.

The impact of BSF will be to create school sites which are lively hubs for community and extended use, with high quality facilities being used extensively and well beyond the school day. This will enrich communities and act as a focus for regeneration in our most deprived areas.

2.2.5 Transition

Transition into remodelled buildings during BSF has the potential to have an adverse impact on standards and learning in all schools. To minimise this risk we have encouraged our schools to build capacity in their senior leadership teams by using revenue flexibilities. Over time, as the demands of delivering a successful remodelled building increase, so will the support from the Educational Improvement Service and the BSF Project Team. During the planning stage, the BSF team has paid detailed attention to developing a well planned approach for each site, carefully assessing the negative impact of decanting students into different areas of the buildings. This has informed decisions on the sequence and timing of the sections of the school for remodelling.

Billingham Campus School will close in September 2009 and will be merged with Northfield School which was judged outstanding in all aspects by Ofsted in 2008. The decision to close was taken because falling student numbers mean that it would be hard to sustain a broad and balanced curriculum in future years. The enlargement of Northfield will provide access to an appropriate curriculum for all current Campus students. Northfield will operate on two sites until BSF funding supports consolidation in remodelled buildings on a single site. A range of transition issues will have to be addressed to successfully manage this complex change agenda whilst sustaining standards of achievement. The final section 8 monitoring visit for Billingham Campus in July 2009 judged that

overall progress since being subject to special measures in 2007 is now good and this will help with the merger.

The Council has appointed the SIP for Billingham Campus as the SIP for the enlarged Northfield School to ensure that the positive improvements achieved for students at Billingham Campus are not jeopardised by the transition. Being included in Wave 6 is providing Northfield with a strong driver to develop a strategy for change with a clear vision of how the enlarged school will transform learning in the future but also showing the steps needed to reach this goal. In preparing for merger, much has been achieved such as progress in establishing common practices but there is still much to be done. In recognition of this, the Council will continue to closely monitor, challenge and support Northfield to further develop and implement the actions in the transition action plan to secure a school on two sites and maintain standards until the school is remodelled on one site.

There are transition issues to address with our proposal to close three schools and replace them with two academies. As new builds, both proposed academies would benefit from the fact that the construction process will not disrupt learning. The proposed Academy in North Stockton would be built on a totally separate site and the construction work at the Academy in Thornaby would be on part of the playing fields with sporting opportunities sustained through access to the all-weather pitch.

Whilst recognising that a new vibrant learning environment is important, the current proposal is for the academies to open in their present buildings. For the Thornaby Academy this would be in September 2010 and for the North Stockton Academy this would be in January 2011. The reason for opening the academies in predecessor school buildings is so that the process of transforming learning and improving the outcomes for students in our most disadvantaged areas can start as soon as possible. We are keen to give the young people the opportunity to benefit from the curriculum flexibilities offered through the Academies Framework as well as the expertise that sponsors will bring. Developing effective leadership at all levels is critical to the success of the academies and the change in the governance of the schools, from community schools to academies, would enable sponsors to bring strong management and governance experience before the new academy buildings are ready in 2013. We don't want to delay our efforts to bring about the transformation that our young people deserve.

All three schools are categorised as schools of concern according to the Local Authority's procedures and will continue to receive significant Local Authority support during the transition phase from school to academy. All three schools are also supported by the National Challenge as they have fewer than 30% of their students achieving 5A*-C with English and mathematics at GCSE. This means that they receive extra funding to address the issue of raising attainment in Key Stage 4 and have a National Challenge Adviser (NCA). As all three schools have the same NCA, there will be a consistent improvement focus during the period of transition to an academy as well as the means of sharing good practice.

For Blakeston and The Norton the role of the NCA will be an important means to secure complementary Key Stage 4 improvement strategies prior to amalgamation as an academy. Both schools will continue to benefit from having a Local Authority designated support adviser working in close collaboration with the NCA.

The Local Authority commissioned a National Leader in Education (NLE) team from Outwood Grange College, a National Support School, to secure improvement in Thornaby Community School from April 2009. The academy sponsors would adopt the change model and NLE systems that are currently being introduced to ensure a smooth transition. The NLE team work closely with the Local Authority and NCA to ensure that current improvement strategies dovetail together and this close

working practice will continue through the transition phase into an academy. The school currently has an Interim Executive Board (IEB) with a clear exit strategy based on the proposal to create a Shadow Academy Board if the school becomes an academy.

As a co-sponsor, Local Authority support and expertise will continue to be available when the academies open in predecessor school buildings particularly where this involves working across two sites as in North Stockton. The BSF Change Manager is responsible for co-ordinating the role of the Local Authority with regard to co-sponsorship of the academies and will identify appropriate advice and support for such things as curriculum development and improvement strategies as the new academies take shape. As a former Principal School Improvement Adviser, the BSF Change Manager knows the school improvement issues for all three schools and will ensure that the focus on improving standards is maintained during the transition phase from school to academy and when the academies open in predecessor schools.

Primary schools are kept up to date with the planned changes to the secondary estate. This will help them prepare pupils for transition from Key Stage 2 to Key Stage 3. All secondary schools included in this BSF wave have good induction programmes for Y6 students entering their schools. As part of the Change Management Strategy, both across the borough and in individual schools, programmes will be developed and delivered cross-phase to better prepare primary students to sustain their learning and be prepared for the new ways of learning they will meet as they move to transformed secondary schools. By working closely with our partner primary schools we will develop effective transition programmes and groupings tailored to student needs. Content on the Learning Platform will be interoperable with the Learning Platforms used by the primary schools so that tracking and assessment data is easily exchanged. Successful online transition programmes will be developed that are differentiated so that they stretch gifted and talented students while providing 'catch up' opportunities for those with literacy or numeracy problems.

The Primary Capital Programme is providing an opportunity to extend the concepts of system leadership beyond the secondary phase that BSF addresses, into the primary phase of education. The BSF Change Manager will deliver the same CPD suite of training events on transforming leadership and learning, which has strengthened the concept of system leadership across the secondary estate, to all primary leaders in the autumn term of 2009. The aim will be to secure shared accountability for the learning outcomes for all pupils cross-phase.

2.2.6 Change Management

We believe that a successful change process for the Council, schools, colleges and academies is grounded in the quality of the shared professional relationships and effective partnership working we have jointly developed over time.

In order to bring about significant improvement through BSF development, our change management programme seeks to address behavioural and cultural change. This includes developing team working practices between the Council, schools, colleges and the academies through collaborative training opportunities supported by the Council workforce development team. By focusing on working collaboratively between schools and the Council, a more enterprising and creative workforce will be developed to transform pedagogy, practice and the curriculum.

In November 2008, a Change Management Group (CMG) was established as a partnership between schools, colleges and the Council with the principal remit of influencing planning and delivery of the BSF strategy. The key objectives for the group, as laid out in the published terms of reference, include developing a compelling vision for transforming learning, promoting successful collaboration for educational transformation, implementing and evaluating strategies and acting as a consultative

body to ensure genuine transformation of learning for all children and young people in Stockton-on-Tees. This group has agreed strategies on personalising learning, ICT, 14-19 and diploma lines, PE and Sport, SEN and inclusion. This is leading to a robust change management plan across Campus Stockton embracing the whole secondary estate, not simply the Wave 6 schools.

This group has benefited from information sessions led by our BSF advisers on managed FM and ICT services and the LEP procurement model which have resulted in unanimous sign-up to the benefits of these services across the secondary estate.

Within Campus Stockton we are developing an effective CPD programme tailored to individual professional needs, which contributes to our aim of transforming leadership and learning across all schools, not just those in Wave 6. This will be through a planned suite of training rather than one-off events and where possible training will be linked to accreditation by NCSL, universities or the TDA. Two collaborative CPD days are already scheduled for staff in all schools and colleges for 2009-10.

Following a presentation to headteachers and principals by the BSF Change Manager in July 2009, the structure for future collaborative CPD will be based on the four deeps: Learning, Support, Experience and Leadership.

Headteachers also agreed that the CPD choice that individual staff make on these days will fit with whole school priorities identified through Individual School Strategies for Change or individual professional needs identified through performance management. This will continue to address the leadership, pedagogical and curriculum development needs for staff in all schools, not just those in Wave 6.

The planned CPD offer will also include ongoing support for schools from the Education Improvement Service to further develop their impact with Assessment for Learning (AfL) and the development of Assessing Pupils' Progress (APP). This will be through shared moderation exercises and individually tailored work in schools. There will continue to be staff development in individual schools to meet the transformational objectives identified in each Individual School Strategy for Change.

The BSF Change Manager undertook a three-month professional sabbatical with Durham University which resulted in a research paper, on the challenges for leadership at a time of complex system change. Based on these findings, the BSF Change Manager delivered a suite of training opportunities to school and college leaders on transformed leadership and learning through the summer term of 2009. This has developed a stronger commitment to the concept of Campus Stockton. Ongoing training is planned, grounded in the research data which was drawn from fieldwork in Stockton-on-Tees. The research identifies both the strengths of collaborative leadership to secure adaptive change and the challenges that still have to be addressed.

2.2.7 Schools' Strategies for Change

Individual Strategies for Change have been written by all schools, including the three schools recently brought into the Wave 6 programme. The ISSfCs contain a compelling vision for the transformation in learning and leadership that BSF investment will bring and a framework for how this will be achieved. This work has been supported by Education Improvement Service Advisers so that there is a constant reference to the overarching educational vision: reshaping secondary education so that it meets the needs and aspirations of the young people of Stockton-on-Tees, with every school a good school where no child is left behind. Schools have also been supported to understand the possibilities offered by new technology.

All Wave 6 schools have taken part in design option and preferred option meetings. Senior School leaders and governors have attended those meetings. Sample schools are now involved in a series of DQI workshops in preparation for OBC development.

2.2.8 Procurement

Since the submission of Sfc2 there have been no changes to the Council’s intended method of procurement. From early feasibility studies and the development of control options it has been clear that the Wave 6 programme would not be attractive to Bidders looking for PFI investment. From the point at which this was established it has been the intention of the Council to seek procurement of the BSF programme through Design and Build contracts via a LEP.

Development of the strategy and scoping for the procurement of a LEP has progressed and it continues to be the Council’s intent that a LEP is procured and that the LEP will provide a number of services, the details of which are indicated in other parts of this document.

With the above intent in mind the Council has submitted a paper to PfS to justify its view on delivering the programme without the inclusion of PFI contracts. The paper clearly indicates the lack of any significant new-build elements in the first wave of investment, other than the two academies, which will not be delivered through PFI.

Even considering the probability of new build in the future wave of investment it is considered that the amount of new build, just one school, would be insufficient to be an attractive PFI proposition.

2.3 Key Estate Priorities

The table below summarises the proposed proportions of new, remodel, refresh, left alone and demolition for all the Wave 6 schools’ developments:

Proposed proportions of new build, remodelling and refreshment						
	New Build	Remodel	Refresh	Unaffected	Demolition	Totals
Phase 1 Sample Schools						
Bishopsgarth	3896	2174	1696	134	3815	7900
	49%	28%	21%	2%		100%
Ian Ramsey	5517	2407	783	178	4771	8885
	62%	27%	9%	2%		100%
Phase 2 Schools						
Academy in North Stockton	8935				100	8935
	100%					100%
Abbey Hill			2884			2884

			100%			100%
Grangefield	5954	2407	524	0	1825	8885
	67%	27%	6%	0%		100%
Academy in Thornaby	7400				10520	7400
	100%					100%
Northfield	2574	4959	1885	1912	1702	11330
	23%	44%	17%	17%		100%
Phase 3 Schools						
Westlands at Grangefield	625	1500	1240	1100	1139	4465
	14%	34%	28%	25%		100%
Our Lady and St Bede's	3516	1831	2264	0	3326	7611
	46%	24%	30%	0%		100%
Bishopton Centre		742	662		1042	1404
	0%	53%	47%	0%		100%
St Michael's	2695	2804	1690	1091	3647	8280
	33%	34%	20%	13%		100%
St Patrick's	500	3770	650	62	710	4982
	10%	76%	13%	1%		100%

Appendix 8: Estate Options to Sfc2 set out details of the options considered for each site, including those considered and rejected during the appraisal process. Since Sfc2 submission, the scope of Stockton-on-Tees's programme has grown to incorporate a further three sites. In addition, work towards OBC has progressed and changes have been made to the plans put forward in the Sfc2 submission for some of the schools in the programme following a robust prioritisation analysis. The following sets out proposals for each site:

School	2 - Ian Ramsey Church of England Voluntary Aided School
Overview of existing condition and issues to be addressed	<p>Existing School</p> <p>Ian Ramsey C of E School consists of two distinct sites of different architecture: North Site, built circa 1963 as a grammar school and South Site circa 1960.</p> <p>South site consists of four blocks. The main building built in 1960, with a languages building added in 1999 and courtyard infilled in 2003. North Site</p>

	<p>built circa 1963 has a new dining room formed in the courtyard in 2006; craft block built 1960 with extensions added circa 1990 and 1992 and the sports block with extensions added in 2005.</p> <p>Both sites are single to three-storey buildings with a mixture of flat felt covered roofs, pitched felt roofs and a mansard roof construction to the three-storey block of the North Site with felt and copper roof coverings. There is also a shallow pitched roof construction to the North Site chapel with a copper roof covering.</p> <p>The external fabric of the building is loadbearing cavity brickwork and loadbearing brickwork with aluminium curtain walling to the South Site block. Craft block and sports block are single-storey construction with flat felt roof areas, a shallow pitched felt roof area over the swimming pool and profiled steel sheet roof to the craft block extension. External fabric consists of loadbearing cavity brickwork with steel casement windows and aluminium curtain walling to two elevations of the swimming pool.</p> <p>The buildings internally and externally are generally in a fair condition but with structural concerns relating to the South Site main three-storey general teaching block, which has been subject to structural review and remediation works to prop the main structure due to high deflections in the floors. A recommendation was made by engineers for the replacement of this block and at present it remains a priority for replacement.</p> <p>Control Option</p> <p>The Control Option responds to the school’s strategy for change proposals for transformation. It addresses the issues currently on site by dealing with the dispersed nature of the school campus, the travel distances between blocks and the vehicular access and car parking issues.</p> <p>Rationalisation of the buildings will allow departments and staff to foster closer links where distance has previously prevented, and create appropriate pastoral and social spaces. The large new build element will allow greater flexibility of teaching spaces in line with the curriculum development, complemented by the good sized general teaching spaces in the existing building.</p> <p>Demolition of the South Site buildings also addresses the key issue of structural condition of the main three-storey teaching block which has been highlighted as in need of demolition. The newly refurbished music block is to be retained for community use as non-FAM area.</p>
<p>Education Priorities as identified by the school</p>	<p>Specialism: Languages</p> <p>Ian Ramsey is a voluntary aided, mixed comprehensive Church of England School. It is a specialist languages college, larger than the average comprehensive school. The school has a clear ethos and vision, the key aim of which is “Opportunity and Achievement within a Christian learning environment”. Inclusiveness is central to the school’s philosophy, and great emphasis is placed on the importance of collective worship and good citizenship. The role of the school in the community, as a specialist language college, is integral to its identity. Internationalism is high on the list of priorities and a key objective in the medium and long term school improvement planning. The school serves the community in both provision of facilities and in terms of work carried out by pupils to serve the interest of the locality.</p> <p>BSF will allow the school to adopt new pedagogic approaches to learning based around the personalisation of the curriculum. It will maximise the use of new technologies and increase significantly the community link aspects of</p>

	<p>its work. At the heart of Ian Ramsey remains its ethos as a Church of England school which provides “the chance for pupils to achieve their potential in a Christian learning environment”. The new building will need to show clearly that Ian Ramsey is a Church School. Areas for worship are of paramount importance as are the chapel and religious artefacts.</p>
Extended Services Provision identified by the school	<p>BSF will enable the school to provide:</p> <p>Study Support to support the personalised learning agenda</p> <p>Clubs and activities using the specialist facilities particularly in PE, Performing Arts, ICT and Languages</p> <p>Sign-posting parents to child care provision within the cluster</p> <p>Parenting support and referral to local agencies providing immediate coordinated responses based in the student support facility. Linking this with SEN and the Chapel will provide access to support beyond the school day.</p> <p>Enhanced collaboration with other local and regional educational providers within and beyond Campus Stockton and with specialist ICT support extended links with schools in Germany, Spain, Holland and Lesotho.</p>
PE and Sports Proposals	<p>There will be a new 4 court sports hall adjacent to the main buildings and linked to the existing pool. In addition there will be a new activity/dance studio.</p> <p>The external areas will be renewed as demolition areas are replaced with grass pitches. The numbers and dispositions of the grass pitches, athletics and summer sports areas, and hard courts (including a new MUGA) ensure the school meets BB85 requirements. They will also be suitable for community use, with easy access from the changing rooms.</p>
Proposed works to existing	<p>The BSF proposal is to create a more compact site of 8,885m² more suited to the needs of its 1,050 students and staff. The teaching area is rationalized to the North Site school area with the remaining site area offering opportunities for improved external sports areas.</p> <p>The North Site comprising of one and three storey buildings is maintained as are the current Chapel, Swimming Pool and changing rooms, which amounts to 3,378m² of refurbishment and remodeling.</p> <p>The south site will be demolished and re-landscaped for sport with the exception of the south site hall and new Music block which will be retained by the school as non FAM area and for community use.</p> <p>The main southern access route to the site will be maintained for community use and drop off. The service access to the north of Fairfield Road will be widened and a new exit added so that buses can drop off within the school grounds. Parking and service deliveries will be provided to the north of North Block. A strong segregated pedestrian link to the main entrance will be created from Fairfield Road.</p>
Proposed new build elements	<p>A new two storey new build teaching block is located to the south-west of the existing north block. This will form a new central courtyard ‘heart space’ and will be connected to the existing buildings via covered links. On the ground floor is new hall, dining and specialist teaching facilities and on the upper floor cluster general teaching arranged departmentally and by year group.</p> <p>The ground floor of the north block is extended for year 7 accommodation.</p> <p>The Sports and Swimming Pool teaching area will be enhanced by a new four</p>

	court sports facility which will sit between the new build two storey block and the current pool which is non FAM area. Despite being detached from the main teaching building it will benefit from footpath link, external play zones and improved community use access.
Indicative phasing strategy (if required) incl. start and finish date	<ol style="list-style-type: none"> 1. Construct two-storey new build block. Partially demolish existing gym in existing sports block. Construct new build sports hall. 2. Decant from existing south block to new build two-storey block. Temporary decant from existing north block to existing south block. Construct single-storey new build link between existing north block and new build two-storey block. Remodel / refurbish existing north block. Construct new build to north-west of existing north block. Refurbish existing sports facilities. 3. Decant existing south block to remodelled / refurbished north block. Retain part of south block for community use. Demolish existing DT block and remainder of south block 4. Complete external works.
Potential risks associated with site/works	<ul style="list-style-type: none"> • Separation of pupils and contractors - access to and within site. • Timing of decant to coincide with school holidays. • Demolition/ disruptive/ noisy work to be planned to avoid exam times. • Condition of retained blocks and extent of planned remodelling. • Timing of external works to coincide with school holidays. • Highways works to bus drop-off • Possible co-ordination with community use facilities
Cost	The control option areas allow for the following work; 5,507m ² of new build (62%), 2,407m ² of remodelling (27%) and 971m ² of refurbishment (11%).
Other options considered	An alternative location for the new sports hall was explored; however it did not create good connections to the main school accommodation.

School	4 – Bishopsgarth School
Overview of existing condition and issues to be addressed	<p>Existing School</p> <p>The current school footprint is an extended single-storey building which houses a large PSH/ SEN department which includes a hydrotherapy pool and offers full inclusion to students of all abilities. The existing buildings have wide circulation routes for this reason and many of the classrooms are adequately sized, slightly larger than BB98, to accommodate wheelchair users and their support staff within standard group sizes for lessons.</p> <p>Bishopsgarth School is a flat roof single-storey construction built in 1970 with cavity brickwork and aluminium windows. Several additions have been made to the school including the SEN department added in 1984. This department has a pitched concrete tile roof and rendered cavity brick wall. Due to low roof levels this extension is prone to vandalism. The latest extension, increasing the size of room 107 incorporating an entrance lobby, was added in 2005.</p> <p>Externally, roofs and associated rooflights are in very poor condition and the school has undergone a recent cycle of replacement of these elements. This is currently 70% complete. Brickwork is largely in reasonable condition but isolated areas of repair and repointing are required. Original windows and curtain walling are at the end of their serviceable life and several sashes have</p>

	<p>been distorted allowing water penetration.</p> <p>External works are very poor and there is little soft landscaping. Footpaths have a high percentage of broken slabs and most require lifting, bedding and relaying, replacing broken slabs. Internally the majority of the main building and annexe are in reasonable serviceable condition but a large number of rooms have water damaged suspended ceiling tiles. Water leaks were identified in several areas. Toilet facilities are also in need of refurbishment.</p> <p>The roof structure is mainly a space frame construction supported by the external load bearing masonry walls that allows flexibility for future internal remodelling.</p> <p>Control Option</p> <p>The control option addresses the school’s desire to play a central part in local community life by encouraging controlled community access to most areas of the buildings both out of hours and during school hours.</p> <p>The proposal is sensitive to the needs of the SEN students and considers the effect of construction and phasing to all school users. It maintains the current SEN facility including the hydrotherapy pool during the construction period to minimise disruption.</p> <p>The current space frame building structure is generous in its opportunities for remodelling and refurbishment as the clear internal spans make subdivision or expansion of spaces easier to construct.</p> <p>The proposals for clustered learning, Faraday model adoption and ranges of teaching space sizes and zones are already being utilised by the school where the current building fabric allows. Further remodelling of these spaces will rationalise departments into single rather than multiple zones that have evolved historically.</p> <p>The proposed plans improve areas that are currently lacking such as introduction of a Learning Resource Centre, an enlarged dining area and separate drama hall, internal social and break out spaces and protected external spaces for learning and activity and a heart to the school.</p> <p>The Control Option offers a 49% new build option with a new single-storey teaching block located on the northern side of the main building.</p> <p>The existing hall, dining and kitchen area is demolished along with part of the single-storey northern teaching wing to achieve the BB98 area requirements.</p> <p>The external spaces are remodelled to create outdoor learning opportunities, active and passive play zones.</p>
<p>Education Priorities as identified by the school</p>	<p>Specialism: Maths and Computing</p> <p>Bishopsgarth is a small secondary school with a distinctive ethos. Its size is its strength. All pupils are known and cared for, regardless of who they are or where they come from. Relationships with parents are strong and families are invariably supportive. Staff strive to work in partnership with the community to raise standards of achievement for all. Part of the school’s unique character derives from the Unit, a 40-place base for children with physical and medical needs. In the last six years the Unit has expanded to accommodate children with statements for mild learning difficulties, ADHD, Asperger's Syndrome and related conditions. This represents both challenges and opportunities for all staff.</p> <p>By embracing BSF, Bishopsgarth School wants students to experience stimulating and varied teaching and learning, with access to first class learning supported by state of the art library and digital resources, which will lead to a rise in literacy. Pupils will have the opportunity to participate in creative activities on and off site leading to the development of self-</p>

	<p>confidence, an increasingly healthy life-style and the chance to gain qualifications leading on to employment in the community. Pupils will become members of an increasingly proactive community that controls its own destiny with further benefit from parental support on the school site.</p>
Extended Services Provision identified by the school	<p>BSF will enable the school to develop a Literacy Parental Support Programme using the LRC which would be open as a community base. Staff would run courses for parents, enabling them to become equal partners in learning. Pupils will have an entitlement to a wide range of Creative and Performing Arts based activities using the new facilities that would be monitored through a Bishopsgarth Creative Passport. The schools see the new heart space provided through BSF as central to developing shared community use. When not used by the school these facilities will be used by the Bishopsgarth Association of Residents and other partners, to address the lack of community resources.</p> <p>The school will enhance its Horticulture provision where residents and family groups can share the learning experiences with pupils.</p>
PE and Sports Proposals	<p>The existing sports hall will be refreshed, with access improved, and a new dance/activity studio created.</p> <p>There will be a new MUGA to replace areas covered by the footprint of the new buildings.</p> <p>There will be new provision for grass areas for summer sports including an athletics track.</p> <p>The external works will meet the requirements of BB85.</p> <p>The school is keen to develop extended school and community use of these facilities, and for children from the Unit.</p>
Proposed works to existing	<p>The BSF proposal is to extend the current school footprint by constructing 3,896m² of new building and remodelling or refurbishing 3,870m² of the existing accommodation with some demolitions. The school will house 793 students.</p> <p>The existing sports hall will be retained and refurbished and with the existing changing rooms will link with the new teaching accommodation. There will be remodelling of spaces in this area also to create an enlarged gym to react to demand from the students and staff. Improved community access and car parking will be available directly adjacent to the sports hall.</p> <p>The PSH/ SEN unit is to remain in its current location with current access, entrance and drop off and hydrotherapy pool facilities remaining also. Allowance has been made for some internal refurbishment and remodelling to this zone.</p>
Proposed new build elements	<p>The proposal creates a large single storey new build block, which will be constructed to sit alongside the current building to the west. The new block will house relocated science and specialist departments initially to free up space for remodelling in the existing buildings later and will be constructed whilst the school is in residence to minimise disruption on site. The new block will also include a hall for performing arts and drama with a central external courtyard forming the heart of the school.</p> <p>Departments will be arranged in clusters, which will overcome difficulties in the existing buildings at present with departments being scattered into a number of zones. Community use will be encouraged with access to the hall area and also to the new Learning Resource Centre, which will be located in a</p>

	prominent position adjacent to the main entrance.
Indicative phasing strategy (if required) incl. start and finish date	<ol style="list-style-type: none"> 1. Construct single-storey new build block to west of existing sports hall. 2. Decant areas to be demolished into new build block. Demolish existing music block. Partially demolish existing main school block. 3. Remodel / refurbish existing main school block. Refurbish existing SEN block. Remodel / refurbish existing sports block. 4. Construct final phase of new build block. Final decant from new build block into remodelled / refurbished existing blocks. 5. Complete external works.
Potential risks associated with site/works	<ul style="list-style-type: none"> • Separation of pupils and contractors - access to and within site. • Timing of decant to coincide with school holidays. • Demolition/ disruptive/ noisy work to be planned to avoid exam times. • Condition of retained blocks and extent of planned remodelling. • Timing of SEN refurbishment to coincide with school holidays. • Timing of external works to coincide with school holidays. • Extent of retaining wall.
Cost	<p>The control option areas allow for the following work; 3,805m² of new build (48%), 2,144m² remodelling (27%) and 914m² of refurbishment (12%). There is also 134m² of unaffected works to the school buildings (2%).</p> <p>SEN additional to the above areas represent 91m² of new build (1%), 30m² of remodelling and 782m² of refurbishment (10%)</p>
Other options considered	Since Sfc2 the Control Option has been developed with particular regard to the proposed phasing. No other options were considered

School	13 – Northfield School
Overview of existing condition and issues to be addressed	<p>Existing Buildings</p> <p>The main school building is single-storey, with a three-storey block at the centre. General teaching, music, drama and arts, design technology, the LRC and staff and administration are located on the ground floor, with general teaching on the first floor and science on the second. The original building dates from 1972, extended in 1998, LRC refurbished from 2004-2007 and music and drama completed 2008. The building is generally in reasonable condition, with the exception of arts and design technology and science. The single-storey section is constructed from brickwork with steel and timber frame. It has aluminium, UPVC and timber windows, composite curtain walling and sections of timber cladding. This block has flat felt roofs at different heights to suit the volumes of the rooms below, with roof lights to some areas. The three-storey section has a steel frame with pebbled cladding panels and pebble dash/ render. It has a low pitch steel profile sheet roof.</p> <p>A separate two-storey sports block was constructed 1999-2003 and has significant shared community use. Part of the area of this building is to be excluded from the FAM, as it exceeds BB98 provision for a school of Northfield's existing size. All playing fields have full land drainage and there is an all-weather pitch. The sports block has a steel frame with brickwork external walls and aluminium windows. It has both flat felt roofs and pitched steel profile sheet roofs.</p> <p>Food technology and textiles are accommodated in a stand-alone single-storey building, which is in poor condition. This block has a steel and timber</p>

	<p>frame with brickwork external walls and composite curtain walling. It has a flat felt roof with roof lights.</p> <p>A caretaker's bungalow and two garages are located to the west of the site. This does not form part of the FAM area. These are constructed from brickwork with UPVC windows. The caretaker's bungalow has a pitched felt roof and garages have flat felt roofs.</p> <p>A brick curved wall encloses a sub-station at the south of the site.</p> <p>Control Option</p> <p>The school's vision requires a 'heart' to the school.</p>
<p>Education Priorities as identified by the school</p>	<p>Specialisms : Sport and Training School</p> <p>Northfield is a larger than the average sized comprehensive school which has absorbed the pupils and staff of Billingham Campus which closed in August 2009, increasing its roll temporarily to 1800. There is a large Sportsdrome and the school was granted Sports College status in 1999. It has the International School award, Sportsmark Gold, Artsmark Silver, the Healthy Schools Gold and Eco Schools Bronze awards. There is special provision for students with visual impairment. Northfield School was judged outstanding in all aspects by Ofsted in 2008.</p> <p>Northfield is a school where there are opportunities for all students to achieve their full potential; where there is enjoyment in learning; where there is a feeling of mutuality between adults and students in a secure, caring and welcoming atmosphere within a culture of high expectations, specifically harnessing the Sports College ethos to promote both physical and psychological well-being.</p> <p>BSF will enable the school to transform learning by personalising the curriculum, redefining the role of the teacher and using ICT to support and deliver this transformation. The school is seeking to transform provision for the well being of all students, led by developments for those with visual impairments. BSF will enable the school to will be at the heart of its community, through extending the model of provision from the Sportsdrome to include an Artsdrome and Technodrome.</p>
<p>Extended Services Provision identified by the school</p>	<p>The drop-in wellness centre linked to the Sportsdrome will provide specialist counselling including bereavement, relationships, anger and stress management in particular for Students with emotional and/or behavioural difficulties.</p> <p>This service will be provided by integrated services and will involve parents and carers, with an increased provision of mentors.</p> <p>As well as providing students with direct support and care, parents/carers, and the wider community, will be able to access a range of services for emotional and social awareness, relationship counselling, obesity, sexual health and advice, and behavioural management.</p> <p>BSF will enable the school to enhance Medical facilities, Spaces for mentoring, and Spaces to facilitate the work of the multi-agency external services.</p> <p>Northfield will extend their model for community access through the Sportsdrome to the proposed Artsdrome and Technodrome, with social and reception facilities focussed on the schools new central heart space.</p> <p>The leadership potential of young people will be developed through the JSLA coaching programme and the Durham County cricket academy.</p>
<p>PE and Sports Proposals</p>	<p>The existing Sportsdrome will be refreshed and part remodelled.</p> <p>The athletics track and other grass areas for summer sports will be replaced where the footprint of the new buildings makes this necessary.</p>

	<p>The school will continue with its strong links with Durham County Cricket Club, and has longer term aspirations for additional indoor facilities: the control option takes into account this need for adaptability.</p> <p>The control option meets BB85 requirements.</p>
Proposed works to existing	<p>The existing main school block is to be remodelled and refurbished, the majority to be general teaching. A lift is to be installed in the three-storey block to provide access. Art and SEN to be located in the former dining area, LRC and Hall to be remodelled in existing locations. The existing Arts and Design Technology wing is to be demolished.</p> <p>A new entrance and reception is to be formed which leads to the covered courtyard that forms the new central heart of the school. Some small areas of teaching accommodation are to be demolished to make way for these alterations.</p> <p>The Sports block is to be part refurbished, with no works to the majority.</p> <p>The Food Technology and Textiles block is to be demolished.</p>
Proposed new build elements	<p>A single storey new build block is to be built to the north west of the existing main school block. This provides specialist teaching accommodation of Science and Design Technology and a new kitchen and dining area. It links to the existing music, drama and Hall.</p>
Indicative phasing strategy (if required) incl. start and finish date	<ol style="list-style-type: none"> 1. New build to west and north of existing building. 2. Decant from main school block to new build food technology and textiles block and second school campus (off site). Demolish arts and design technology wing. Temporary decant to former food technology and textiles block. Demolish classrooms to central courtyard. Demolish section to form new entrance. <p>Refresh music and drama, refresh small section of general teaching, and refresh small section of sports. Demolish former food technology and textiles block. Complete external works.</p>
Potential risks associated with site/works	<ul style="list-style-type: none"> • Separation of pupils and contractors - access to and within site. • Timing of decant to coincide with school holidays. • Demolition/ disruptive/ noisy work to be planned to avoid exam times. • Condition of retained blocks and extent of planned remodelling. • Timing of external works to coincide with school holidays. • Ground conditions – piling may be required. • Extent of retaining wall.
Cost	<p>The control option areas allow for the following work; 2,574m² of new build (23%), 5,568m² of remodelling (50%) and 1,648m² of refurbishment (15%). There is also an unaffected area of 1,200m² (11%). SEN works additional to the above allow for remodelling an area of 140m² (1%).</p>
Other options considered	<p>This school was brought forward to wave 6 during the OBC stage, so the Control Option and rejected Control Options are both for Sfc2 and OBC stages.</p> <p>The options considered were for differing ratios of new build to remodel / refresh of the existing school buildings.</p> <p>The first option provided the minimum new build accommodation required to replace the existing food technology block, which is in very poor condition</p>

	<p>and to be demolished. This option does not provide the transformation desired.</p> <p>The second option demolished the existing staff and design technology accommodation and proposed a new build extension to the North. This approach does not provide a central heart space for the school.</p> <p>The third and fourth options both proposed new build two storey extensions to the West, with differing areas demolished. Neither approach created the right kind of accommodation clusters or linkages between areas required.</p>
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School	1 - Grangefield School (To complete awaiting agreement of Control Options)
Overview of existing condition and issues to be addressed	<p>Grangefield School was built circa 1945 as a grammar school. The buildings are arranged in a linear format and were originally planned to segregate boys' and girls' wings. The focus of each wing is a number of open quadrangle gardens which circulation routes are worked around, and which also allow borrowed natural light into the deep plan via glazed circulation routes and internal screen windows to the classrooms. The plan is symmetrical, designed initially to offer equal accommodation for each sex and separate entrances.</p> <p>The building is constructed from load bearing brickwork with a mix of pitched and flat asphalt roofs and is generally single-storey with a number of two-storey elements. The floor to ceiling heights internally are very generous. The roof void areas are currently out of bounds due to high levels of asbestos.</p> <p>Since initial construction the school buildings have evolved to suit current needs and the building now operates as mixed sex school. A number of buildings, permanent and temporary have been added to date.</p> <p>There are nine buildings in total on the site. The main building as described, a two-storey brick-built caretaker's house built 1976, a brick built garage adjacent to the house, a single-storey brick built CDT block which houses some boiler plant, a further brick built garage, Learning Support Block which is a separate timber and glass clad single-storey building to the rear of the site located on land to the far side of a public footpath, two temporary timber clad mobile classroom units which are in poor condition and a two-storey brick built stand alone sports hall.</p> <p>The majority of the timber windows with the exception of the sports hall are showing signs of severe decay and require replacement. Generally the condition of the buildings is Grade C with the exception of the mobile classroom units.</p> <p>Control Option</p> <p>The Control Option design offers the compact design, flexibility and range of space that currently the existing buildings lack. By arranging the specialist areas into the new build elements of the school, disruption during remodelling is greatly reduced.</p> <p>Better links are created between departments with clusters arranged around the departments complimented by breakout and outdoor learning and social spaces. The building is set back from the main road offering better opportunity for drop off on site and improved car parking. A separate pedestrian route is created to the main entrance.</p> <p>The travel distance between all blocks is vastly reduced both internally and</p>

	externally. External covered walkways will offer shelter during inclement weather.
Education Priorities as identified by the school	<p>Specialism – Technology</p> <p>With 1205 students on roll, Grangefield is larger than the average 11 - 16 secondary school. Grangefield is an aspirational school with strong traditions. Located on the site of two former grammar schools, it is firmly committed to being a school for the whole community and providing an outstanding educational facility for that community.</p> <p>At the end of the Building Schools for the Future programme, Grangefield will be a school firmly grounded in its community, with strong foundations in its history but clearly established as a leading edge, twenty-first century technology college aspiring to a second specialism within the Stockton-on-Tees community of schools.</p> <p>The BSF programme will have delivered a technology-rich environment that promotes personalised and effective learning, with students seeking to lead their community, ready and able to pursue their chosen careers with self-belief and assurance. Grangefield School will continue to be a place where young people enjoy the experience of education and through that experience reach their full potential; a place where people are happy to work together to support individual achievement.</p>
Extended Services Provision identified by the school	<p>The school will develop support services accessed through ICT, bringing together the attendance team, special educational needs, behaviour support, mentoring and advice and guidance.</p> <p>As a partner in Campus Stockton, Grangefield aspires to be a test-bed for development and a hub for good practice and to have a key role in making the methodologies of technology available to primary schools. The ICT investment from BSF will be a key factor in enabling effective sharing of new initiatives. Within the Stockton-on-Tees 14-19 Partnership there is an expectation that Grangefield will lead in key aspects of vocational and academic development.</p> <p>The school will develop adult and family learning, through on site courses and online learning. The school will enable parents and carers to support their children, by signposting opportunities and support services, and providing access to further learning.</p> <p>Grangefield will use the extended services to contribute to neighbourhood regeneration and community engagement by making available its facilities, enabling co-location of services, and by actively engaging with key partners and agencies.</p> <p>The BSF programme will enable Grangefield to provide the range of facilities for sport and PE to ensure access for all to a wide range of activities and to enable the school to offer five hours of activity to all students each week.</p>
PE and Sports Proposals	<p>The control option meets BB85, and addresses some of the shortcomings of the existing site. Where Westlands is co-located, there will be replacement of hard courts and a new MUGA. New pitch layouts have been included to allow for the co-location.</p> <p>The school will work with Wetlands to provide external sports areas to augment their provision if possible.</p> <p>There will be a new 4 court sports hall in a more central position for access to the playing fields, making for better curriculum and community use. In addition there will be a new dance/activity studio.</p> <p>Athletics spaces and a grass running track will be replaced.</p>
Proposed works to	The BSF proposal is to create 8,885m ² of more efficiently planned space

<p>existing</p>	<p>which is more agile to its 1050 pupil and staff needs. Due to the linear nature of the present plans, travel distances are significant and so the aim is to improve the circulation and the teaching room sizes by compacting the current plan. This proposal therefore reduces the current main building footprint radically and looks to utilise new build elements to compliment the cellular layouts of the existing buildings by offering more flexible room layout opportunities.</p> <p>The proposal maintains the two eastern quadrangles and links parts of the existing main building. It utilises the sheltered quadrangle areas as formal outdoor learning spaces lending natural daylight to the classrooms currently arranged off them.</p> <p>The main building is to be remodelled to form clusters of teaching rooms into department suites. A new Learning Resource space will be created at the centre of the plan with break out spaces externally.</p> <p>The Inclusion Unit is to be located in the remodelled existing building. This will be far more integrated into school life than its current remote location and still allow easy access for external agencies to visit.</p>
<p>Proposed new build elements</p>	<p>A two-storey teaching wing will be linked back to the main building by a semi covered new external courtyard with a central activity studio at its heart. This will act as a covered social area during wet break times and a break out space for teaching areas.</p> <p>The new build will connect to the existing building to the front to form a new entrance area and frontage to the school with a presence on Oxbridge Avenue. A new hall will be adjacent to the entrance and on the opposite side of the new wing a new dining area.</p> <p>DT and Science will be relocated into the new block from the main building and be arranged in clusters following the Faraday model. This move will allow ease of refurbishment of the main building for more standard teaching spaces once constructed. The hall, a new sports hall, Creative Arts and general teaching clusters will also be located in the new block.</p> <p>There will be a number of outdoor learning spaces linked to the buildings offering both passive and active opportunities, including the outdoor dining and forum space to the west of the building.</p>
<p>Indicative phasing strategy (if required) incl. start and finish date</p>	<ol style="list-style-type: none"> 1. Build two-storey new build. 2. Decant into new build from eastern quads and music. Demolish curved music block. Remodel quads. 3. Remodel dining and demolish link between dining and western quads during school holidays. Complete external works during school holidays. 4. Decant into eastern quads from western quads and curved IT wing, sports and DT. Works complete for Grangefield School. 5. Commence works for Westlands School: remodel western quads and curved section. Demolish DT block. Build new residential and school extension. No works to sports block. Complete external works. 6. Decant from Westlands site into this site

Potential risks associated with site/works	<ul style="list-style-type: none"> • Separation of pupils and contractors - access to and within site. • Timing of decant to coincide with school holidays. • Timing of dining remodelling to coincide with school holidays. • Demolition/ disruptive/ noisy work to be planned to avoid exam times. • Maintain access to and parking for CLC throughout works. Demolition/ disruptive/ noisy work to be planned in consultation with CLC • Condition of retained blocks and extent of planned remodelling. • Timing of external works to coincide with school holidays. • Possible highways works to north access road and junction
Cost	<p>The control option areas allow for the following work; 5,990m² of new build (60%), 2,371m² of remodelling (24%) and 524m² of refurbishment (5%). With the co-location of Westlands SEN within the site there are both benefits to costs associated with minimal relocation of children from the existing Westlands site, and also benefits to re using the existing building at Grangefield.</p>
Other options considered	<p>At SFC2 stage Grangefield School was to occupy the whole site and be located to the rear, western part, of the site. The new scheme, sharing the site with Westlands has the benefit of locating Grangefield at the front of the site, giving the school a visible presence from Oxbridge Road. Less demolition is required, which has both environmental and cost benefits. Teaching accommodation is located around the new courtyard and travel distances between teaching clusters and specialist accommodation are reduced.</p> <p>An alternative option was considered that retained the existing dining and kitchen in its current location. However this was rejected as the location was not central to the school.</p>

School	3 - Our Lady & St Bede's Roman Catholic Voluntary Aided School
Overview of existing condition and issues to be addressed	<p>Existing School</p> <p>Our Lady and Saint Bede's School was originally divided into separate boys' and girls' schools in identical buildings with shared sports facilities. Now mixed and renamed Block A and Block B the current site blocks are a mirror of each other with a large amount of duplicated facilities.</p> <p>The school consists of four buildings, Block A, Block B, Middle Block which is a new single-storey courtyard link building between A and B, and a separate swimming pool and gym.</p> <p>All the buildings were constructed circa 1964 with Block B and the swimming pool/gym being extended circa 1972.</p> <p>The buildings are constructed with a structural steel frame supporting a cavity brick and steel framed curtain walling with felt covered flat roofs. The survey condition is reasonable. The buildings internally are generally in a good condition but externally the majority of the buildings are in a poor condition. The majority of the roof coverings are reaching the end of their serviceable life; these will require replacement within five years. The majority of the external works, paving and tarmac etc are in poor condition.</p> <p>Control Option</p> <p>The Control Option addresses the current constraints with the existing site</p>

	<p>and building. It rationalises the school footprint and offers the opportunities for cross-curricular links (which the school has outlined in the strategy for change) by bringing departments closer together. It offers opportunities for large-scale remodelling of internal spaces to create both the range of teaching spaces and the flexibility required by the school's proposed curriculum thoughts.</p> <p>The internal spaces within B Block lend themselves to remodelling and the current circulation is simple in its arrangements. The introduction of lifts within the existing main building and new buildings will aid DDA access, which is currently very poor.</p> <p>The addition of the new four court sports hall will offer better indoor sports facilities to the school than the current gym (which is not of a suitable size for large groups) and will offer more flexibility with its sub-division options. The current changing rooms would be refurbished. The pool is retained as both a school and community facility as non-FAM area.</p> <p>The Control Option is for a 47% new build teaching facility and four court sports hall located in a courtyard arrangement to the south side of the current B Block. New external areas would be created for external learning, passive and active play.</p> <p>The current three and single-storey A block buildings would be demolished as would the current single-storey Middle block.</p>
<p>Education Priorities as identified by the school</p>	<p>Specialism: Arts</p> <p>Our Lady & St Bede is a voluntary aided 11-16 Catholic school, with 82.5% Catholic pupils. Parents value its high commitment to individual care through spirituality and extra-curricular activities. Its philosophy aims to meet the needs of today's young people and develop the whole person in the light of Gospel values. The school has a Centre of Excellence for provision for secondary aged pupils with Autistic Spectrum Disorders. The school was awarded specialist status in 2008 as an Arts College.</p> <p>BSF has been the trigger for the formation of the hard federation of Catholic schools within the Borough, and increased collaboration with St Patrick's and St Michael's. The federation will provide leadership for transforming the learning experience across all three schools.</p> <p>Through BSF the school aims to increase attainment in all subjects through a transformation in pedagogy focussed on personalised learning.</p> <p>14-19 Curriculum Improvements will develop distinct and flexible pathways for learners that link into the local 14-19 agenda. This will also enable the school to play a leading role in the delivery of creative aspects of Diploma lines.</p> <p>Personalising the support for each student within a Christian environment and enhancing and extending the centre of excellence for ASD/Autism will further remove barriers to learning.</p> <p>The school will work with other schools, colleges and training providers to ensure that all pupils have a wide access to suitable courses delivered in specialist surroundings. To ensure this there must be a suitable network infrastructure that will cope with present and emerging technologies as well as the capacity for future extension.</p> <p>The vision for pastoral support is to move from a year group system to a structure based on a vertical house system linked closely to curriculum/faculty areas.</p>
<p>Extended Services Provision identified</p>	<p>The Arts facilities will be used by the community, with extension of adult courses to specialist subjects, e.g. literacy for asylum seekers and migrant</p>

by the school	<p>workers with ICT/e learning for this group.</p> <p>The proposed two Independent Learning Centres will be used by after school clubs and the community.</p> <p>The school will extend its parishes outreach work drawing on the new BSF provision.</p> <p>The Chapel will be used for regular masses by school and community.</p> <p>The Home/Parish/School LINK (including primary schools) will be enhanced with the new facilities at OLSB acting as the hub.</p>
PE and Sports Proposals	<p>There will be a new 4 court sports hall adjacent to the pool, and a new dance/activity studio, new hard tennis courts and some new grass pitches to re-align layouts to conform to the additional buildings.</p> <p>The pool will be refreshed.</p> <p>The control option meets BB85 requirements.</p> <p>The existing synthetic running track will be retained, and a long term aspiration will be to renew the track (it is the only non-grass running track in the borough).</p>
Proposed works to existing	<p>The proposal is to transform the current school environment by addressing the key site issues identified with relation to proximity of departments, inefficient circulation, duplication of facilities within blocks and travel distances.</p> <p>The proposals take into account pupil numbers of 785 with a total building area of 7,611m² including the current ASD unit. The existing block housing tenants Tees Valley Music / SPARK would remain.</p> <p>4,026m² of existing buildings would be refurbished or remodelled with works being focussed on the current B Block. Middle Block and A Block would be demolished upon completion of the refurbishment works.</p> <p>The main three storey building areas would be remodelled to offer a selection of general teaching room sizes. Art and Design and Design Technology would be located within the remodelled single storey section of the existing building. The ASD unit would be located close to the new entrance.</p> <p>The separate swimming pool block would be retained as non-FAM area with the existing adjacent changing rooms being refurbished to suit.</p>
Proposed new build elements	<p>Of the proposed 3,585m² of new build works to the site, a new sports hall would be constructed alongside the pool block and link into the existing changing rooms. This would replace the current gym which is in poor condition and undersized.</p> <p>The remaining new build area would be constructed as a two-storey science, music, general teaching, learning resource centre and dining facility. These areas would be flexibly designed to offer clustered teaching zones arranged around the LRC space. The new building would be located to the rear of the site enclosing the current open hard play area thereby creating an enclosed courtyard space for outdoor learning and passive play. Servicing to this building would be via a shared existing access road to the eastern boundary, which currently serves the Design Technology block.</p>
Indicative phasing strategy (if required) incl. start	<ol style="list-style-type: none"> 1. Construct two-storey new build to south of existing 'B' block. 2. Decant from existing 'B' block to two-storey new build block. Remodel / refurbish existing 'B' block. Demolish existing kitchen block between

and finish date	<p>existing middle block and 'B' block. Demolish existing gym block.</p> <p>3. Construct new build entrance and ASD unit to 'B' block. Construct new build sports hall to south of existing sports block.</p> <p>4. Decant from demolished existing school 'A' block and middle block to new build block and remodelled / refurbished 'B' block. Demolish existing middle block and 'A' block.</p> <p>5. Complete external works.</p>
Potential associated risks with site/works	<ul style="list-style-type: none"> • Separation of pupils and contractors - access to and within site. • Timing of decant to coincide with school holidays. • Demolition/ disruptive/ noisy work to be planned to avoid exam times. • Condition of retained blocks and extent of planned remodelling. • Timing of external works to coincide with school holidays. • Co-ordination and separation of works with Tees Valley Music
Cost	<p>The control option areas allow for the following areas of work; 3,456m² of new build (45%), 1,743m² of remodelling (23%) and 2,177m² of refurbishment (29%).</p> <p>There is also SEN provision additional to the above areas of 129m² new build (2%) and 106m² of remodelling to the existing building (1%).</p>
Other options considered	No other options were considered.

School	5 – Academy in North Stockton
Overview of existing condition and issues to be addressed	<p>Existing School</p> <p>The predecessor schools to be housed in the new academy are Blakeston School and The Norton School.</p> <p>Control Option</p> <p>Since SfC2, the Control Option proposal has been developed. The control option is to construct an 8,935m² new build Academy for 1090 students over two storeys on a currently disused site in North Stockton.</p> <p>The departments are arranged in clusters linked by a central agora space with access to ICT at the centre of the curriculum. The main street / agora being the front door to the community and offering break out curriculum spaces and social spaces out of teaching hours.</p> <p>The layout and orientation of the proposed building seeks to mitigate the impact of being within an Environment Agency flood plan, by raising the floor levels to those advised and not required additional bunding works.</p> <p>Consideration has been given to other possible community shared facilities on the site such as the proposed MyPlace in the south-west corner that could offer linkages with the Academy specialism.</p> <p>Access issues were considered with on site vehicular drop off and improved car parking to ease congestion on Talbot Street. Community use parking was also considered with the sports hall and facilities being located adjacent to the pitches for convenience of use.</p> <p>External gardens and outdoor classroom spaces have been considered in quiet zones that can be accessed via classrooms if required. More active play</p>

	<p>zones are located toward the sports area and soft informal and habitat areas along the beck / northern boundary. This feeds into the Council's desired urban planning for a green wedge, with the site bounded on the north side by Lustrum Beck, which is lined with existing trees.</p> <p>The Blakeston School and The Norton School will then decant into the new Academy.</p>
<p>Education Priorities as identified by the school</p>	<p>Specialism: Science, supported by a strong Health and Wellbeing theme</p> <p>The predecessor schools serve some of the most deprived wards in the borough often seen as a 'corridor of deprivation' in North Stockton. Both schools are part of The National Challenge. Both schools have specialist status and sponsors see this as part of a combined capacity to form a joint organisation to support the vision.</p> <p>The Academy would place students at the heart of the organisation with a focus on personalised learning. This would be an academy that young people would be proud to go to, staff would be proud to work in and parents would be proud to send their children to. The Academy's goal is that students would be inspired and excited by learning, would enjoy improved emotional well-being, and would take responsibility for their own health and well-being. The aim would be to create a vibrant, agile, ICT rich learning environment which encourages students to be positive participants in the learning process with high aspirations to achieve their personal best. Sponsors would be keen to encourage the wider community to engage in achieving this vision for the young people of North Stockton so that there is a clear and direct link between the benefits that education and health and well-being can bring to future generations and their communities.</p> <p>To support the specialism there would be a wide range of science courses including sports science, environmental science as well as health related science courses.</p>
<p>Extended Services Provision identified by the school</p>	<p>The Academy would provide an extended services strategy incorporating:</p> <ul style="list-style-type: none"> • Study Support to support personalised learning and to overcome barriers to learning with on line resources and staff support. • A breakfast club. • Community education programmes, using the academy's specialist resources • Education on health related issues. • Child Care by sign-posting parents to child care provision. • Partnership with the Integrated Service Area so that other support agencies (e.g. Police, Connexions, CAMHS and YOS) provide support beyond the school day. • Involving local businesses in the delivery of work related curriculum content. • Opportunities to meet the academy's "seven challenges" including fitness programmes, charity projects, community work, sporting challenges, sustainability developments and cultural events. • Relationships with community groups, employers and local businesses.
<p>PE and Sports Proposals</p>	<p>The new build academy will include a 4 court sports hall and an activity studio closely incorporated into the school buildings.</p> <p>The pitches and hard courts will conform to BB85 requirements. The existing all weather pitch will be renewed.</p> <p>The facilities for PE and Sport will enable high quality delivery of the sponsor's</p>

	vision for health and wellbeing.
Proposed works to existing	The existing predecessor schools will be demolished following decant to new the Academy.
Proposed new build elements	<p>Stockton Academy is to be a new build school for 1050 students on the former Tilery / Stockton Sports Centre Site in North Stockton.</p> <p>The current site sport centre buildings are currently in the process of being demolished by Stockton Borough Council to offer a cleared site for construction of the new Academy.</p> <p>The proposed site is 78,789m² and currently accommodates existing disused facilities including a former full sized adult football AWP and a 400m running track. The current proposals aim to plan around these facilities and bring them back into use as part of the external sport facilities for the academy.</p> <p>The site is bounded on the north side by Lustrum Beck, which is lined with existing trees. The location of the new academy buildings will be set back from this area as it has been identified as a possible flood risk zone.</p> <p>The proposal is for a flagship new build 8,935m² Academy arranged over two storeys to accommodate 1050 students. The brief was developed with both the predecessor schools with the specialisms of health, lifestyle and sport being the curriculum focus.</p>
Indicative phasing strategy (if required) incl. start and finish date	<ol style="list-style-type: none"> 1. Construct new build academy over two-storeys on a site previously occupied by a Sports Centre North Stockton. 2. Decant Blakeston School and The Norton School into the new Academy.
Potential risks associated with site/works	<ul style="list-style-type: none"> • Flood risk from Lustrum Beck • Road widening and new access point • Co-ordination with adjacent MyPlace Youth Project
Cost	Stockton Academy control option allows for a new build of 8,885m ² . Additional allowances have been made for site piling, adjustment of site levels and potential of contamination of the existing site.
Other options considered	Alternative location options of the new building were reviewed as part of the flood levels study to mitigate the impact and ground works required.

School	6 – Academy in Thornaby
Overview of existing condition and issues to be addressed	<p>Existing School</p> <p>The predecessor school to be housed in the new academy is Thornaby Community School (TCS). The new academy building is to be constructed on part of the existing site of TCS and St Patrick's RC Comprehensive School. Currently the two schools share Sports Facilities, including an All Weather Pitch, on an informal basis. Both St Patrick's Governing Body and the Academy's Lead Sponsor are supportive of this arrangement continuing and this informal agreement is expected to be formalised with a Service Level Agreement, once the Academy is further progressed. It is proposed that on completion of the new academy building the TCS building will be refreshed to accommodate St Patrick's temporarily while the existing St Patrick's buildings are remodelled. Interim arrangements will be made to provide additional sports facilities. Following remodelling, St Patrick's will relocate to the former building, the TCS buildings will be demolished and the area reinstated as</p>

	<p>playing fields.</p> <p>Control Option</p> <p>The control option design considers the implications of constructing alongside an existing fully operational school. The proposed location of the building on the current sports pitches would allow the site to be cleanly segregated from school operations with a separate contractor access. Upon decant into the new Academy buildings the existing buildings could be easily separated into a further contractor compound for safe segregated demolition work followed by landscape re-instatement works to complete the project.</p> <p>Outdoor learning spaces and break out have been considered with horticulture spaces, external dining and media gardens as well as active play and more formal sports pitches.</p>
<p>Education Priorities as identified by the school</p>	<p>Specialism: Business Enterprise, supported by a strong Digital Creativity theme</p> <p>Thornaby Community School serves one of the most deprived areas in Stockton-on-Tees. Over the last four years the school has worked collaboratively with the Council, as a school that causes concern, to raise standards of attainment and improve student outcomes at all levels. The school is part of the National Challenge Programme.</p> <p>The sponsors have agreed a set of values which inform the aims and objectives of the Academy. These include:</p> <ul style="list-style-type: none"> • excellence and the achievement of the highest educational standards for all students; • opportunity and the raising of students’ aspirations; • respect and inclusivity for all members of the Academy community and in the Academy’s work with external groups and organizations; • empowerment of students as learners and teachers as professionals; • partnerships as a means of ensuring the academy is fully integrated with the communities it serves and the ‘family’ of schools to which it belongs. <p>The Academy would put students first with a focus on personalised learning. This would be an academy that young people would be proud to go to, staff would be proud to work in and parents would be proud to send their children to. The aim would be to create a vibrant, agile, ICT rich learning environment which encourages students to be positive participants in the learning process with high aspirations to achieve their personal best.</p> <p>Business and Enterprise would be reflected throughout the curriculum, as well as in the newly developed subject area of business.</p> <p>Sponsors are committed to the development of digital and creative media opportunities as a strong curriculum area of the Academy. It would be regarded as an important strand in re-engaging students and in providing a focus for a wide range of technology- assisted creative activities.</p>
<p>Extended Services Provision identified by the school</p>	<p>The Academy would provide an extended services strategy incorporating:</p> <ul style="list-style-type: none"> • Study Support for personalised learning and to overcome barriers to learning. There would be a breakfast club. • As part of the academy’s ‘Ten Pledges’ there would be a strong sports and performing arts provision. • Community education programmes, capitalising on access to specialist resources such as ICT, and sports facilities. All parents of Academy students would be entitled to a relevant college programme, with ICT enabled home learning. • Sign-posting parents to child care provision.

	<ul style="list-style-type: none"> • Linking to the Integrated Service Area in Thornaby ensuring partnership with e.g. Police, Connexions, CAMHS and YOS providing access to support beyond the school day. • A step change through the involvement of local businesses in the delivery of the work related curriculum content and out of hours activities. • Opportunities to meet the Academy's + 'Ten including fitness programmes, charity projects, community work, sporting challenges, sustainability developments and cultural events • Contributing to social and economic regeneration by enhancing relationships with community groups and local businesses.
PE and Sports Proposals	<p>The new build academy will include a 6 court sports hall which will enable shared use with St Patrick's School as well as providing a larger space than normal allowing a wider range of uses.</p> <p>There will also be an activity studio.</p> <p>The pitches, hard courts, athletics areas and running track will be new as the building footprint will largely cover the existing playing fields, and will meet BB85.</p> <p>Temporary arrangements have been agreed during construction, and while St Patrick's occupies the Thornaby Community School buildings.</p>
Proposed works to existing	<p>Demolish predecessor school Thornaby Community School following decant to the new Academy.</p>
Proposed new build elements	<p>The Control Option is to create a new build Academy of 7,400m² for 790 students over two storeys on the playing fields of the current Thornaby Community School site. The proposal is to demolish the existing school and re-landscape its footprint on completion of the Academy building.</p> <p>Further consideration has been given to access and phasing, with the proposal to have a new vehicle access point off Mitchell Avenue. This will access a separate delivery and parking area to be completed once the existing Thornaby Community School building has been demolished.</p> <p>The proposed building is a two storey block arranged around the 'Media Centre'. This would be the heart space of the buildings which would house a performance / hall / ICT access and forum space into which the five key faculties would plug into.</p> <p>Of these five faculties clustered learning zones within each would offer a range of teaching space sizes and opportunities for agile plan arrangements. Each faculty would link back into the specialism via the Media Centre. This would offer cross curricular adjacencies and links including vocational activities.</p> <p>Outdoor learning spaces and break out have been considered with horticulture spaces, external dining and media gardens as well as active play and more formal sports pitches.</p> <p>A larger than required six court sports hall is provided which with the sports pitches for the Academy to the north are shared with St Patrick's School to the west.</p> <p>The current site currently shares a full sized All Weather Pitch with St Patrick's</p>

	<p>School and it is envisaged that this arrangement will continue once the Academy has been constructed. The proposals have therefore been designed to accommodate this current arrangement.</p> <p>The brief was developed with Thornaby Community School and based on specialisms of Digital Creative Media and ICT as the curriculum focus.</p>
Indicative phasing strategy (if required) incl. start and finish date	<ol style="list-style-type: none"> 1. Construct new build academy over two to three storeys on the playing fields of the current Thornaby Community School site. 2. Decant Thornaby Community School into the new academy. Refresh TCS buildings for use by St Patrick's. 3. Decant St Patrick's RC School into TCS buildings. Remodel St Patrick's buildings. 4. Decant St Patrick's into remodelled buildings and demolish TCS buildings. Reinstate sports pitches and complete external works including realignment of boundaries.
Potential risks associated with site/works	<ul style="list-style-type: none"> • Separation of pupils and contractors - access to and within site. • Timing of decant to coincide with school holidays. • Demolition/ disruptive/ noisy work to be planned to avoid exam times. • Timing of external works to coincide with school holidays. • Possible highways works for new access
Cost	The control option for Thornaby Academy allows for a 100% new build with a total area of 6,875m ² .
Other options considered	Since Sfc2, the Control Option proposal has been developed, to reflect the revised pupil places, the larger 6 court sports hall and new access off Mitchell Avenue proposed.

School	7 – Abbey Hill School Technology College
Overview of existing condition and issues to be addressed	<p>Existing School</p> <p>Abbey Hill School is an SEN school with a design technology specialism. The campus is composed of 3 main buildings plus ancillary buildings. The main building is a single-storey cavity wall construction with pitched roofs constructed circa 1991 with more recent extensions. The main Abbey Hill school building is arranged around a central covered central courtyard that doubles as a design technology making space. Wide corridors are top lit naturally via atria style roof lights.</p> <p>Internal finishes are robust to suit the needs of the school with fairfaced brickwork and colour coded routes as directional signage. The Sheraton Building completed in 2007 offers post-16 SEN provision, with the Walker Building [2009] includes additional teaching for Specialist severe autistic pupils 11-16 and social accommodation both constructed in a similar style with a steel framed cavity wall building with artificial slate pitched roof, .</p> <p>The buildings are generally in a good condition. The external works are well considered and include a horticulture area and sensory garden.</p> <p>The site is shared with a community use sports block, which is owned by Stockton-on-Tees Borough Council, and the school uses this facility during school hours. It is brick construction with felt flat roof, circa 1960.</p>
Education Priorities as identified by the school	<p>Specialisms: Technology and Applied Learning</p> <p>The Federation's context</p> <p>The Federation currently consists of Abbey Hill School & Technology College</p>

	<p>in Stockton and Westlands School in Thornaby. The two schools serve a population of 420 students aged 5 to 19 with a broad range of learning needs, making the Federation one of the largest SEN provisions in the UK. The nature of the students' needs is wide and varied - requiring close assessment, personalised planning, innovative curricula and highly skilled teaching within appropriate surroundings</p> <p>The Federation's vision</p> <p>The Federation's vision is to provide a more inclusive and innovative framework for the delivery of children's services to vulnerable children and young people through an ambitious and evolving programme. It will ensure strong partnership with mainstream schools in order to utilise and customise current mainstream teaching and learning initiatives such as enterprise and citizenship to maximise the possibility of appropriate full or part-time reintegration of students into local mainstream schools. The Federation will also ensure the curriculum and its delivery is personalised, motivating and experiential. Realisation of the vision will require a learning environment which is sensitive to the specific needs of vulnerable young people and motivates students who have experienced considerable failure in life and learning. The ambitious agenda will involve extensive and intrinsic collaboration with other statutory organisations as well as the voluntary, independent, and business sectors.</p> <p>Abbey Hill will focus on IT as a distinct element within the overall BSF agenda, reflecting the extent to which developments in its own school estate to date already equip it to deliver on BSF outcomes. This will build on its strengths as a technology college, specialist in this area to support learning and improve teaching. As a technology college, it will develop specialist areas to drive improvement and enhance opportunities for students by developing teaching strategies linked to cutting edge resources. As a leader in innovative use of IT to meet the needs of vulnerable learners, it will benefit children and staff from the other schools in Campus Stockton.</p>
Extended Services Provision identified by the school	<p>The Federation seeks improved multi-agency collaboration, going beyond the school day.</p> <p>The school will extend the engagement with pupils' local communities, in particular families and carers, through opportunities for young people and their families to be motivated and supported to improve access to learning. Business links to support employment and training appropriate to the individual special needs of pupils will be extended.</p>
PE and Sports Proposals	The school's playing fields will remain as the BSF scope will be entirely within the buildings.
Proposed works to existing	The works consist of a refresh only to existing buildings.
Proposed new build elements	N/A
Indicative phasing strategy (if required) incl. start and finish date	The school will be able to temporarily vacate spaces where works are carried out on the ICT infrastructure, where it is not possible to carry out the works in the school holidays.
Potential risks associated with site/works	<ul style="list-style-type: none"> • Timing of works to coincide with school holidays
Cost	The works to Abbey Hill relate to making good and light refurbishment to the school area of 2,884m ² . This allowance has been made to allow a good state

	of repair following the ICT Installations at the School.
Other options considered	No other options were considered.

School	8 – The Bishopton Centre
Overview of existing condition and issues to be addressed	<p>Existing School</p> <p>The Bishopton Centre is a Pupil Referral Unit, which houses students at risk of exclusion from mainstream schools. It is currently split into Key Stages 3 and 4. Most students spend only short amounts of time in the Unit before being re-integrated back into mainstream school life. Pupil numbers can therefore vary throughout the term.</p> <p>The building was constructed circa 1970 and is a single-storey building using cavity wall and curtain-walling construction with felt flat roofs. There are two areas of northlights in the pitched section of roof – these are also a felt finish. The Building is generally in a reasonable condition internally with replacement of toilet areas a key priority. Externally several windows and curtain walling areas are suffering wet rot and are at the end of their serviceable life. Externally, the building is generally in a reasonable condition. Some attention is needed to the verge roof trims. There is limited car parking and little formal landscaping. There is some hard play but this is not currently marked out for sport and is not to standard sports size. A horticulture area is currently under development.</p> <p>Internal spaces have been altered on a number of occasions to accommodate teaching needs. At present there is no sport facility on site i.e. gym or sports hall or grass pitches, and sport if undertaken is off site.</p> <p>Wrensfield House</p> <p>Wrensfield House is located next to the existing Bishopton Centre. It was constructed as an Adult Training Centre circa 1970, and is currently used as education offices. It is a single-storey L shaped building with a former gym and hall at opposite ends of the building, connected by a mix of medium to small rooms and ancillary spaces.</p> <p>The building is constructed of brickwork with timber windows. All roofs have a felt finish and have sections that are pitched and others that are flat. The former workshop area has north lights over. There is car parking in the central courtyard and to the south of the site, with grassed areas to the north and east. To the west the existing Bishopton Centre building sits within five metres of Wrensfield House.</p>
Education Priorities as identified by the school	<p>The Bishopton Centre is an all-age pupil referral unit formed in April 2008 from the amalgamation of a six-place primary pupil referral unit (Green Gates) and a 66-place secondary pupil referral unit (Bishopton Centre).</p> <p>The PRU is committed to providing transformational education that meets the needs of students in the twenty first century, listens and responds to pupil voice and has a regard for the partnership of parents and the wider community. It embraces the 5 outcomes of the Every Child Matters agenda. The PRU believes that all pupils are equally valued regardless of their circumstances, abilities or behaviour and are entitled to play a full part in the Stockton learning community. This means that close partnership working with mainstream schools is an essential aspect of improving the outcomes for the most vulnerable learners that they serve. For that reason, supporting the conceptual and operational development of ‘Campus Stockton’ is a fundamental part of the Bishopton vision.</p>

	<p>BSF will enable the delivery of a highly effective professional service that focuses on ensuring that the young people supported become confident and successful learners who are well prepared for the world of work and so become responsible citizens, colleagues and partners and caring parents of the next generation.</p> <p>This will be achieved through:</p> <ul style="list-style-type: none"> • Personalisation that values the uniqueness of each pupil and develops resilient learners. • Guaranteeing progression into economic well-being for all students • Workforce transformation that wraps the team around the student • Community engagement
Extended Services Provision identified by the school	<p>The pupils at the PRU are from the poorest, least healthy areas/families in the Stockton Borough and the centre in one such area (Newtown).</p> <p>Through BSF the PRU seeks to provide facilities for sport to engage the pupils and the local community.</p> <p>The PRU will provide learning opportunities, ICT classes, basic cooking and health and fitness programmes beyond the school day. Where possible these will be opened up to the community</p> <p>There will be a breakfast club in the heart of the school.</p> <p>Effective multi-agency collaboration delivering interventions on site will be established. Co-ordination and comprehensive support will be developed with the PRU as a hub.</p>
PE and Sports Proposals	<p>The existing buildings will be demolished, providing for a small grass pitch, which has been a feature of pupil requests from BSF.</p> <p>The refreshed and remodelled Wrensfield buildings will include a gymnasium.</p>
Proposed works to existing and new build elements	<p>The future Bishopton Centre is to include the site of both the existing centre and the neighbouring Wrensfield House. Wrensfield House is to be remodelled and refurbished to provide 1401m² of new accommodation. New accommodation includes separate areas for KS 3 and KS 4 general teaching, specialist DT, Gym, Hall/Dining and staff and administration. The existing centre is to be demolished and replaced by external sports, teaching and social areas.</p> <p>New build is restricted to the provision of new canopies to the entrance and covered walkway linking the opposite ends of the building.</p>
Indicative phasing strategy (if required) incl. start and finish date	<ol style="list-style-type: none"> 1. Wrensfield House remodelled and refurbished. External works to Wrensfield House site completed. 2. Decant from Existing Centre into Wrensfield House. Demolish Existing Centre. Complete external works.
Potential risks associated with site/works	<ul style="list-style-type: none"> • Potential flood risk to site from Lustrum Beck. • Site security – site is in an area prone to vandalism. • Separation of pupils and contractors - although separate site, pupils may take an interest in the works. These are very challenging pupils. • Timing of decant to coincide with school holidays. • Demolition/ disruptive/ noisy work to be planned to avoid exam times. • Condition of retained blocks and extent of planned remodelling. • Timing of external works to link the two sites to coincide with school holidays. • Removal of poplar trees to link two sites.
Cost	<p>The existing Wrensfield house control option splits the work equally between Remodelling and Refurbishment (50%/50%) with areas of 705m² each</p>

	<p>respectively. Because we are able to phase the works there is now no requirement for decanting and temporary accommodation for this option. This is a benefit financially and to the pupils.</p>
Changes from Sfc2	<p>At Sfc2 stage the proposal was to remodel and refurbish the existing Bishopton Centre, with a minimal amount of new build. There were major concerns about the viability of carrying out the building work while the building was still occupied, as Bishopton PRU students are particularly vulnerable to disruption – both from building works on site or temporary decant.</p> <p>Relocating the school to other sites was considered as a way to avoid the temporary decant of Bishopton PRU students. The expansion of the site to include Wrensfeld House was established as the preferred option.</p> <p>Wrensfeld House has rooms that are suitable for conversion to a new PRU. The proposal to remodel and refurbish Wrensfeld House allows Bishopton PRU to continue operating, without disruption, in the existing centre for the duration of the building works. Once the building alterations are complete, the PRU can decant. This allows the existing centre to be demolished, again without disrupting the PRU.</p> <p>The location of the PRU is good; other sites that were considered did not have the same advantages. Using Wrensfeld House keeps the location consistent. Increasing the site area by including both sites provides larger and more suitable external sport, learning and social areas.</p>

School	9 – Westlands School
Overview of existing condition and issues to be addressed	<p>Existing School</p> <p>Westlands School is a BESD SEN school which is currently defined as the main school building at ground floor level with a partial first floor zone which houses a respite residential unit for up to 15 pupils and support staff.</p> <p>The school was built in 1976 in loadbearing cavity brick with felt roofs. The school building consists of a single-storey main teaching /administration/ kitchen block with a two-storey residential block attached. The school sits on the site of the former Thornaby Aerodrome: the external playing fields are constructed above the former concrete runway / apron which cause issues with land drainage. There is also a detached CDT block in a former garage with loadbearing cavity brick walls with a felt covered flat roof and mono-pitched roofs covered with lightweight profile roofing panels.</p> <p>The overall condition survey is reasonable.</p> <p>The shiplap boarding and the plywood sheet cladding on the elevations is decaying and in need of replacement. The cladding and curtain walling to courtyard elevations are also in need of replacement.</p> <p>Internal circulation within the building is poor with narrow corridors and rooms within rooms, which does not complement the sensitive nature of the curriculum. At present the shared dining / gym hall is the only sports facility. This is problematic for use as it is also a main circulation route through the building. There are few breakout spaces for staff and students and some internal materials are not sufficiently robust for purpose.</p>
Education Priorities as identified by the school	<p>The Federation’s context</p> <p>The Federation currently consists of Abbey Hill School & Technology College in Stockton and Westlands School in Thornaby. The two schools serve a population of 420 students aged 5 to 19 with a broad range of learning needs,</p>

	<p>making the Federation one of the largest SEN provisions in the UK. The nature of the students' needs is wide and varied - requiring close assessment, personalised planning, innovative curricula and highly skilled teaching within appropriate surroundings. In addition, approximately 15 young people live during the week in the school residence within Westlands.</p> <p>The Federation's vision</p> <p>The Federation's vision is to provide a more inclusive and innovative framework for the delivery of children's services to vulnerable children and young people through an ambitious and evolving programme. It will ensure strong partnership with mainstream schools in order to utilise and customise current mainstream teaching and learning initiatives such as enterprise and citizenship to maximise the possibility of appropriate full or part-time reintegration of students into local mainstream schools. It will also ensure curriculum delivery is personalised, motivating and experiential. The vision requires a learning environment which is sensitive to the specific needs of vulnerable young people and motivates students who have experienced considerable failure in life and learning. The ambitious agenda will involve extensive and intrinsic collaboration with other statutory organisations as well as the voluntary, independent, and business sectors.</p> <p>Through BSF Westlands will focus on its role as the centre for excellence for pupils with BESD within Campus Stockton. It will aim to ensure pupils are immersed in and not removed from their communities both local and beyond, in particular by working with its co-location partner mainstream school. Westlands aspires to develop a transformational context within which the vision, strategy, physical design, curricular and social learning environment and effective practice combine to produce a campus which introduces innovative and sustainable developments and produces significant improvements in standards and outcomes. This will be achieved by supporting the concept of Campus Stockton, by effective and ambitious leadership for learning and by developing a holistic approach to student development.</p>
Extended Services Provision identified by the school	<p>Westlands will create a "one stop shop" for children and young people, and their families and carers, with a range of statutory and voluntary services providing a range of therapies and mental and other health services.</p> <p>The school will work with educational, vocational and business partners to provide a range of life skills and vocational experiences, within and beyond the school campus, providing pathways to improved economic opportunities</p> <p>The school will use indoor games areas for PE and fitness to promote family health and well being and fitness. Access to specific outdoor areas shared with Grangefield will enhance the range of activities available.</p> <p>Westlands will provide a 24-hour, integrated curriculum for looked after and vulnerable young people.</p>
PE and Sports Proposals	<p>The school will have a new sports hall, a small grass pitch and hard courts. These will provide Westlands with manageable, secure spaces for PE and Sport.</p> <p>Westlands will liaise with Grangefield where sharing of the Grangefield facilities is desired.</p>
Proposed works to existing	<p>Westlands school to be moved to Grangefield site and occupy the vacated accommodation following Grangefield School's redevelopment.</p> <p>This will enable all building works to be undertaken without affecting the existing establishment. This is extremely important for the needs of the pupils involved. It also gives the potential of integrating into the mainstream school</p>

	<p>and facilities.</p> <p>The western part of the original 1948 building of school buildings at Grangefield are to be retained, with new build link at south to form third courtyard.</p> <p>Classrooms around existing quads to be refurbished and remodelled to provide teaching accommodation with outdoor learning areas within quads. Primary pupils to be located in east quad with Secondary pupils in west quad, with central hall retained. The science classroom to north is to be remodelled to provide new kitchen. Therapy spaces to be located within curved section with staff and admin adjacent new entrance to north.</p> <p>Existing gym to be converted to residential accommodation, linked with new build two-storey residential to south east of new courtyard. Specialist teaching accommodation to be located in new teaching wing to south west of new courtyard, linked to secondary teaching area around existing quads. Outdoor learning areas to south of these buildings.</p> <p>Grangefield former Design Technology block to be demolished. No works to retained Sports Hall. New parking to north of Sports Hall and drop off to be formed adjacent new Westlands entrance.</p> <p>Assumed clearance of existing Westlands buildings and site not within BSF programme.</p>
Proposed new build elements	<p>A new build block is to be built connecting the existing gym and quads. Part two storey for residential and part double height for specialist teaching spaces.</p>
Indicative phasing strategy (if required) incl. start and finish date	<p>Refer to Grangefield school phasing as Westlands school to be moved to Grangefield site.</p>
Potential risks associated with site/works	<ul style="list-style-type: none"> • Not applicable as Westlands school to be moved to Grangefield site. • Assumed site clearance is not within BSF programme.
Cost	<p>The option of utilising the existing Grangefield Buildings for the provision of Westlands allows the existing building to be segregated with an element of new build. The following SEN areas are provided for within the control option; 625m² new build (17%) 1,600m² remodelling (45%) and 1,364m² of refurbishment (38%) As with Grangefield there are financial benefits to co locating the two schools together.</p>
Other options considered	<p>At SFC2 stage Westlands School was to be remodelled in its existing site, with some minor new build extensions. There were major concerns about the viability of carrying out the building work while the building was still occupied, as Westlands students are particularly vulnerable to disruption – both from building works on site or temporary decant.</p> <p>Relocating the school to other sites was considered as a way to avoid the temporary decant of Westlands pupils. This study forms part of SFC2 Appendix 8. Since SFC2. Further studies have since established that relocating Westlands at Grangefield is the preferred option. This allows Westlands School to continue operating, without disruption, on the existing site for the duration of the building works.</p> <p>Grangefield has sufficient site area to accommodate Westlands. There is the potential to use each other’s specialisms and facilities such as sports pitches and horticulture. The existing buildings at Grangefield would be suitable to</p>

	<p>convert into a new Westlands School. The phasing of works would avoid the need for temporary accommodation.</p> <p>An alternative option was considered with the residential accommodation located in a stand alone new build block to the west of the site. This approach was rejected as did not provide a secure environment with a single entrance or create the connections required between the school and residential areas.</p>
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School	St Patrick's RC Comprehensive School
Overview of existing condition and issues to be addressed	<p>Existing Buildings The main school building is single storey, with a two-storey block to the west. General teaching, Music, Drama, Arts, Design Technology, Science, the LRC and Staff and Administration are located on the ground floor, with General Teaching and ICT spaces on the upper floor. The original building dates from 1964. The building is generally in B condition. It is constructed from brickwork with timber windows and infill panels, and flat roofs. Little significant improvement has taken place in the building and therefore significant maintenance issues have to be resolved including roof coverings, curtain walling as well as electrical and mechanical services.</p> <p>Control Option The school's vision requires a central space 'heart' to the school.</p>
Education Priorities as identified by the school	<p>St Patrick's Roman Catholic voluntary aided school is a smaller than average secondary school with 548 students on roll. Post BSF it will be a 500 place school. 80% of the school population is drawn from Thornaby and 20% from the growing development of Ingleby Barwick. The education provided is available to all the families in Thornaby and Ingleby Barwick. St Patrick's achieved Mathematics and Computing Specialist Status in 2008. For St. Patrick's, the biggest challenge is to prepare students for the 21st century world. Based on a secure understanding of the gospel message the schools wants students to be responsible citizens who respect others and are enterprising and well prepared for life and work. They will need the confidence to relate well to others, make healthy life choices and to celebrate their talents. As a result of BSF investment, and leadership through the Catholic Federation, learners in the school will develop the essential learning skills of literacy, numeracy and ICT and also acquire a range of skills that are different from those produced by the traditional curriculum and traditional school organisation. Through BSF the school will create a learning environment that moves away from the factory model to an ICT rich environment facilitating independent learning which allows students to access a wider range of teaching and learning styles.</p>
Extended Services Provision identified by the school	<p>St Patrick's will co-ordinate student support (during and beyond school hours) through its new houses, including access to the Integrated Service Area. This support will include information, advice and guidance, behaviour support, EPS, Attendance, Connexions, School Chaplain and School Nurse. A point for future development would be a service that links to other services in Stockton providing an integrated approach to family health and adult and family learning. The school will manage pupil and staff integration across the Federation, for curricular and extended schools provision.</p>

	St Patrick's will co-operate with the Academy in Thornaby to share sports and PE facilities for curricular, extended schools and community uses.
PE and Sports Proposals	The school has use of an existing All weather pitch which will continue to be shared with the adjacent Academy. The school will have two grass pitches and two hard tennis courts. St Patrick's will share the new facilities of the adjacent Academy in Thornaby.
Proposed works to existing	The existing main school block is to be remodelled and refurbished, with a new build element. This will create general teaching house bases and specialist areas for Science and Arts and Design Technology. The entrance will be relocated to connect to a new Resource area and the existing Hall is to be refreshed and to open out to new covered central courtyard space. A new entrance and reception is to be formed which leads to the covered courtyard that forms the new central heart of the school. The gym block is to be demolished with the school having shared us of the new sports hall in the new adjacent Thornaby Academy. A new larger Dining area will be created and the existing second Dining and kitchen will be demolished.
Proposed new build elements	A two storey new build block is to be built to the north west of the existing main school block. This provides science specialist teaching on the ground floor and general teaching accommodation on the upper floor. A new central space will be created by covering over the existing courtyard area, with new landscaping and outdoor learning and dining opportunities.
Indicative phasing strategy (if required) incl. start and finish date	<ol style="list-style-type: none"> 1. New build to West of existing building. 2. Phased remodelling and refresh of retained school. 3. Demolition of existing gym and dining/kitchen. 4. New covered central space.
Potential risks associated with site/works	<ul style="list-style-type: none"> • Separation of pupils and contractors - access to and within site. • Timing of decant to coincide with school holidays. • Demolition/ disruptive/ noisy work to be planned to avoid exam times. • Condition of retained blocks and extent of planned remodelling. • Timing of external works to coincide with school holidays. • Ground conditions – piling may be required.
Cost	TBC
Other options considered	This school was brought forward to wave 6 during the OBC stage, so the Control Option and rejected Control Options are both for Sfc2 and OBC stages. The initial study for St Patrick's investigated relocating the school to the adjacent Thornaby Community School will become vacant once the new Academy at Thornaby is complete. It is possible to relocate the school but would require extensive demolition, as the existing accommodation of TCS however is too large for St Patricks. It was consider that this option would not be transformational for the school as the building does not lend itself to the proposed house groupings and the external areas were awkward. Options were then looked at to transform the existing St Patrick's accommodation.

	<p>The first option explored demolishing the existing undersized gym and replacing with a new 4 court sports hall. This approach does not provide the additional teaching spaces required or create the heart space.</p> <p>The second option retained the existing gym and proposed a new build extension to the hall. This approach does not provide the additional teaching spaces required and the hall is considered too large.</p> <p>The third option extended the hall and proposed a new build two storey extension to the front for additional teaching spaces. In this approach the hall is considered too large.</p>
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School	St Michael's RC Voluntary Aided Comprehensive
Overview of existing condition and issues to be addressed	<p>Existing Buildings</p> <p>The existing St Patricks School was built in 1964 – 72 and is located at the eastern edge of the Billingham catchment area. The buildings have had little major improvement work and have significant deficiencies relating to condition especially relating to Asbestos, flat roof coverings, curtain walling and electrical and mechanical services.</p> <p>With the potential of the redevelopment of Northfield School, the Campus site in the centre of Billingham became available with offered advantages in terms of location and facilities as well as improved condition of existing building stock.</p> <p>The Campus school comprises four blocks, Sports, Blocks A and C and CDT. There is also a CLC building on the site.</p> <p>The Sports block is also for Community use and consists of 2 – 4 court sports halls, 2 gym spaces, school and community changing, a pool and dining facilities. The building dates from 1964but went significant improvements for community use following a NoF Sports Grant in 2004. The building is generally in reasonable condition. It is constructed from loadbearing masonry walls with a space deck roof.</p> <p>Block A block is mainly single storey with 2 no. three storey blocks of upper floors. On ground floor there are two halls, LRC and Staff / Administration spaces, and the upper floors are General teaching accommodation. The building dates from 1964. The building is generally in adequate condition. It is constructed from steel frame with curtain walling</p> <p>Block C block is two storey linear block of Arts and General teaching. The building dates from 1968. The building is generally in satisfactory condition. It is constructed from loadbearing masonry with some steelwork, concrete first floor and timber roof.</p> <p>The CDT block is single storey building, constructed in 2007 and purpose designed for technology. The building is in good condition. It is constructed from load-bearing brickwork with pitched roofs.</p> <p>The CLC block is single storey and recently purpose designed and built accommodation. The building is generally in good condition. It is constructed from load-bearing brickwork with pitched roofs.</p>

	<p>Control Option</p> <p>The school's vision requires a central space 'street' to the school and new build science accommodation to the 'front' of the school to reinforce the specialism.</p>
<p>Education Priorities as identified by the school</p>	<p>Specialisms : Science and Applied Learning</p> <p>St Michaels' Roman Catholic School is a Voluntary Aided mixed comprehensive school primarily serving the Catholic communities of Billingham and Norton, with 870 students on roll. This figure is expected to rise to 1000 as a result of the Stockton-on-Tees Local Authority Strategy for Change plan to reduce the number of secondary schools in Billingham.</p> <p>BSF has been the trigger for the formation of the hard federation of Catholic schools within the Borough, and increased collaboration with St Patrick's and Our Lady and St Bede's. The federation will provide leadership for transforming the learning experience across all three schools.</p> <p>BSF will provide St Michael's with the opportunity to transform learning through the personalisation of the curriculum. and the exploitation of assessment for learning; transforming teaching through the utilisation of cutting edge pedagogy fully supported by emerging technologies and the transformation of learning spaces to enable flexible, creative, independent learning.</p> <p>BSF investment will act as a catalyst for re-thinking how student needs are met, through extended services. It will aid the school to grow further its proactive response to 'Every Child Matters', so that there will be 'No Child Left Behind'.</p>
<p>Extended Services Provision identified by the school</p>	<p>Extended schools provision will be strengthened as barriers to communication and access disappear and students feel enabled to use facilities and access out of school opportunities across the federation.</p> <p>The federation will co-ordinate community partners to ensure that students can access community expertise effectively without overburdening companies and other community providers</p> <p>St Michael's will become increasingly important as the location for specialist services and as the location for integrated teams within Billingham. The school aim will aim to provide a range of accessible targeted services</p> <p>St Michael's will provide access to core extended service provision within the partnership, including family/community learning, and social events.</p> <p>Within the Billingham community the school will provide links to adult and family learning, and will support the development of the local economy through work with partners such as job centre plus. They will also be part of the provision of 'things to do and places to go' for young people, in particular in making the sports and leisure facilities as widely available to the community as possible.</p>
<p>PE and Sports Proposals</p>	<p>St Michael's will have the two sports halls and two gymnasia on the Billingham Campus refreshed, together with the pool.</p> <p>The athletics track and summer sports areas will be new grass spaces.</p> <p>The site includes seven grass pitches and will also have four new hard courts.</p> <p>The sports and PE provision exceeds the requirements of BB85.</p>
<p>Proposed works to existing</p>	<p>The existing Block C is to be refurbished for general teaching, no work is expected on the existing Technology block and these will be supplemented by the construction of 2 new blocks at the west and south forming a block of 4 buildings.</p> <p>The Sports / Dining block will be refreshed.</p> <p>The Original 3 storey A Block will be demolished.</p>

	There is also a CLC on the site, which will remain as non-school accommodation.
Proposed new build elements	<p>A new part two / part three storey block is to be built between the existing CLC and block C.</p> <p>This provides new entrance, LRC, SEN and Creative Arts specialist teaching on the ground floor, Science specialist teaching on the first floor and general teaching accommodation and staff/administration areas on the upper floor.</p> <p>A new central space will be created by covering over the external area between the new block and block C, with new landscaping and outdoor learning and dining opportunities.</p>
Indicative phasing strategy (if required) incl. start and finish date	<p>As the pupils will have vacated at time of construction there will be no requirement for educational phasing. Sports Block and CLC will remain in operation and therefore access will have to be maintained.</p> <ol style="list-style-type: none"> 1. Demolition of existing block A 2. New build blocks 1 and 2 3. Remodel retained block C 4. Refresh non FAM areas of existing Sports block.
Potential risks associated with site/works	<ul style="list-style-type: none"> • Condition of retained blocks and extent of planned remodelling. • Ground conditions – to be assessed.
Cost	TBC
Other options considered	<p>This school was brought forward to wave 6 during the OBC stage, so the Control Option and rejected Control Options are both for Sfc2 and OBC stages.</p> <p>The options considered were for differing ratios of new build to remodel / refresh of the existing school buildings.</p> <p>The first option explored demolishing blocks A and C and replacing with new build. This option was not considered affordable</p> <p>The second option demolished the existing block C and replaced with new build. This approach was not considered feasible due to the difficulties of remodelling the existing towers and limitations with the footprint.</p> <p>The third and fourth options both proposed new build two storey blocks to either side of the existing CDT block. Neither approach created the central street area desired or good location for new entrance and science learning zone.</p>

3 THE PROJECTS

3.1 Option Analysis & Feasibility

This section of the OBC describes the methodology for carrying out the feasibility studies at each school within the Wave 6 programme. It sets out how the agreed scope of works at each school was identified. It also details the additional investigations carried out and approvals sought since the submission of the SFC2 to confirm the validity of the options for each school.

Options Appraisal Methodology

The purpose of the options appraisal process was to ensure that each proposal:

- was set within the Council's strategy for educational transformation as set out in the SFC and Section 1.1 of this OBC;
- delivered the school's education vision with minimal disruption;
- addressed condition and suitability issues and demand for places within site constraints; and
- was deliverable within the overall programme funding envelope.

This was translated into a four-stage process to identify the preferred control option for each school. Broadly, the stages adopted were:

1. Programme wide review of proposals;
2. Identification of emerging options for each school to deliver the education vision;
3. Selection of preferred control options;
4. Review and Confirmation of preferred control options.

The approach adopted takes into account the education drivers at the programme level and for each school site. Alongside the options appraisal process, the Council has worked with schools in developing their own Strategies for Change, and schools have undertaken extensive consultation with teachers and the Senior Management Teams. These have been used as the key drivers in shaping the options for each school site. Schools have been active partners in the process, agreeing the approach to be taken in the Change Management Group and through numerous school-level meetings. The options appraisal methodology has been shaped by and conducted within the parameters of the Design Process Protocol.

The BSF Project Team identified school leads for each school in the programme. These staff supported the schools' BSF leads and the Technical Advisers to ensure that proposals developed accurately reflected schools' education visions and the requirements of the programme. Throughout the process, we have been careful to manage school expectations of the programme, and this has ensured the production of a deliverable option of works for each school. The options appraisal process has been ongoing since Stockton-on-Tees Council entered the BSF programme in June 2008. Although the phases are largely sequential, it has been an iterative process that has been principally conducted on two levels - programme and school.

The design options appraisal process for individual schemes was delivered at school level by the BSF Project Team, external Education Adviser and the programme's Technical Advisers, with headteachers, the schools' internal BSF teams and Governors. A series of school design meetings were held to identify the school-level estate options. For all schools, the process of developing the options commenced with the development of their Individual School Strategy for Change. This was initiated at the outset of the programme by the BSF Change Manager. A series of three meetings was held at each school during preparation of Strategy for Change Part 2. The descriptions below are generic and describe the process adopted for all schools. Additional meetings were also held in some schools to further refine the emerging options in line with the school's vision.

School Level Meetings 1 and 2 - These sessions were held with all the original Wave 6 schools between December 2008 and March 2009. Sessions with Northfield were completed in June 2009, and with St Patrick's and St Michael's in July 2009. At the first meeting, the headteachers and their internal BSF Teams shared their emerging visions. This was supported by Advisory colleagues from the Education Improvement Service and the BSF Project Team. Technical Advisers translated the school's objectives into a series of block-level drawings of the school site, setting out various proposals. In some instances additional options were produced, but typically the main options considered were:

- No works - this was only considered for relatively new build areas and areas with no reported suitability or access issues;
- Minor refresh of existing property;
- Major refresh and remodelling of existing property;
- Part refresh/remodelling and with new build extensions; and
- All new build.

The parameters for each option were that they must:

- Meet the Council's vision for educational transformation;
- Support the school's emerging educational vision as set out in its ISSfC;
- Where possible, remove existing access, condition and suitability issues;
- Minimise phased works and temporary accommodation;
- Provide a viable, stable and supportive learning environment for the 21st century for all pupils;
- Take into consideration the likely demand for places in the foreseeable future and address issues of future demand;
- Be feasible within site constraints, for example, likelihood of planning approval, position relative to neighbouring buildings, buildability, phasing and abnormals;
- Impact positively on the affordability of the overall programme and promote good access and security for the site.

These parameters provided a reference point for the high-level options appraisal exercise. The options produced at this stage also took account of existing sports facilities, where these were proposed for retention, highways interfaces and potential planning restrictions to ensure that the proposals were deliverable. For some schools up to four options were produced.

At this stage, the school then shared the various options within the school staff and governors and fed back their comments to the BSF team and the Technical Advisers. The options were then further refined to produce a set of developed proposals for work at each school site.

To identify the preferred or control option for each school, the OBC Development Group set up an evaluation process to score the various high-level options for each school across. A high weighting was applied to achieving transformation and having a positive effect on affordability. The aim of this evaluation was to identify an option for each school site that was affordable within the overall programme funding envelope.

The options were scored against set criteria using the following method:

- 0- Fails to meet the criteria
- 1- Partially (25%) meets the criteria
- 2- Largely (75%) meets the criteria
- 3- Fully meets the criteria

Only options that largely or fully met the criteria were deemed to provide the best fit for delivery of the high level parameters.

School Level Meeting 3 - this was a more detailed analysis of the proposed options with the aim of identifying which were favourable to the school in meeting their education transformation priorities. The options were then prioritised in order of preference with the highest priority option becoming the school's preferred scheme.

A robust review of each scheme has been undertaken in terms of cost, quality and educational transformation.

Confirmation of control options set out in Sfc2

The preferred options set out in the Sfc2 submission provided the starting point of further investigations during the development of the OBC. More detailed feasibility studies of the options have been carried out to identify whether the proposals were achievable and affordable at site and programme level. This more detailed feasibility study has identified that changes are required to some proposals to ensure deliverability.

Alongside this work, schools supported by colleagues from the Education Improvement Service and the project's Technical Advisers have continued to refine their education visions and produce adjacencies and accommodation schedules. This has led to a further refinement of the options during the production of the OBC. The changes required to the proposals set out in our Sfc2 are summarised in Section 2.3. Assessments of the affordability of the proposals throughout the development of OBC mean that we are able to validate a programme of works within this OBC submission that balances deliverability with the requirements of the programme, and schools' education strategies.

Refining the preferred option

At the individual school level, the process of confirming and refining the options continued through a series of school level meetings between headteachers, schools' internal BSF Leads, the programme's Technical Advisers and the BSF Project Team. These meetings were also attended by the programme's ICT Lead to identify the requirements for ICT infrastructure and output specifications.

A series of further school-level meetings has been held with each school throughout the development of the OBC. Additional meetings have also been held with the sample schools. At these sessions Technical Advisers produced accommodation schedules based on BB98 and supported schools to carry out adjacency analysis and how this might impact on their accommodation schedules. Once the design process was complete the Technical Advisers produced the final plans showing potential zoning layouts within the buildings based on the school's adjacencies analysis for the preferred option, taking into account the various site investigations, surveys, planning and conservation issues as agreed with the PfS Design Manager. Accommodation schedules based on BB98, BB102 and DCSF PRU guidelines have also been produced.

3.1.1 Expansion

Projections of future student numbers across the borough indicate a steady fall to a low point in September 2015 followed by a rise to 2018. Current projections of primary pupil numbers suggest that secondary numbers may continue to rise beyond 2018. At this stage we do not envisage that

any additional school sites will be required. Land will be available to extend schools on existing sites if required. Mainstream school projects in Wave 6 will provide a built-in surplus of 3% (244 places across nine schools in three distinct geographical areas).

Work to confirm the sufficiency of schools through the council's pupil place planning section was under continual review prior to formal entry into the BSF programme. For BSF an initial review of the structure and location of provision was conducted, based on pupil number projections and matrices of parental preference, to ensure a close match between supply of, and demand for, places. Although pupil place planning has continued throughout the development of the Strategy for Change, informed by revised annual projections and preference matrices, the robust early work undertaken allowed us to confirm the required structure of secondary provision across the Council with only minor alterations. The pupil number projections have been agreed with the PFS Education Director.

Opportunities to co-locate special schools on mainstream school sites were also explored at this stage. Of the two special schools in the programme, Abbey Hill School Technology College has recently built new facilities, and it was clear that no benefit was to be gained from any proposal to re-locate this provision. A possible option to co-locate Westlands School on the Grangefield School site was identified.

The Council's 'Readiness to Deliver' submission, which identified the likely level of new build required at each site, was reviewed using up-to-date Asset Management Plan information. Technical Advisers reviewed the condition and suitability surveys for each school. A full summary of this work and the Asset Management Plan data was included in the SFC2 submission. Alongside this work, the schools and Council Education visions were drawn together. The Council's proposals for delivering choice and diversity were summarised in SFC1. The emerging proposals were included in the initial high-level programme level review of options.

3.1.2 PE and Sport

For each school in Wave 6 and those schools in the later programme a comparative exercise has been undertaken of current and recommended sports playing fields and sport facilities generally. The review considered the complete range of public and private sports provision across the Borough, and sought to maximise access to as wide a range of activities as possible beyond an agreed core sports and PE provision. The Change Management Group will manage the location of centres of excellence and specialist hubs across Campus Stockton to achieve the most effective distribution. This information has been used to identify the scope of works at each site. Additional PFS funding for multi-use games areas and all-weather pitches is only allowable where an increase in pupil numbers results in a shortfall of playing field provision. The preferred option for each school in the programme has reviewed the sports facilities requirements and confirms that sufficient space is available on each of the sites. No allowance for additional funding has therefore been included.

The PE and Sport Stakeholder Group includes Sport England representation and a PE and Sport Communications Strategy has been developed to support the work of the PE and Sport Stakeholder Group and to work in conjunction with the overall BSF Communication Strategy. Consultation with Sport England has also been undertaken prior to the submission of planning briefs. This identified no major issues for any of the schools.

A Section 77 review of all the sites has been carried out and assessed against future expansion requirements.

All school sites that are being retained, with the exception of Grangefield, will have their playing field areas safeguarded and will be capable of complying with the requirement of BB98 and BB82 as well as Section 77 requirements.

Grangefield School is being developed to include the co-location of Westlands School within the site boundary. Current indications are that the Grangefield School site can accommodate both schools within the section 77 criteria.

3.1.3 Design Quality

Refining the preferred option designs for the sample schools was on-going until development of their School Strategies for Change was finalised. At this stage the BSF team provided an overview of the next stage of the process. These meetings were also used as an opportunity to identify the emerging themes in design. These sessions were supported by the BSF Client Design Adviser, headteachers and representatives from the internal BSF team, governors and external architects. Key themes that had emerged during the Sfc2 options appraisal process were shared with all schools and refined where deemed necessary. All the stages of the design process were also discussed with the Pfs design manager. Other design priorities identified and discussed at the sample school meetings are set out below:

- Transforming external appearance of refurbished buildings to place excellent schools at the heart of their communities in accordance with CABA principles.
- Design to reflect different cultures
- Good use of existing trees and landscaping
- Good quality and exciting teaching and learning environments.
- Facilities that meet the needs of pupils with Special Educational Needs (SEN)
- Plans for post-BSF maintenance at all schools
- Attention to detail
- Stimulating and light environments
- That ICT needs to be embedded within the designs
- That a creation of an ICT base that will act as interface with the community
- Provision of flexible ICT for the future and use of hard and wireless network
- Flexible and adaptable learning spaces
- Designs to reflect the school's specialisms
- Dispersal of pupils around school to reduce overcrowding in circulation areas
- Sufficient space for holding increasing numbers of exams
- Design to incorporate departmental and house based structures
- Design to create a 'heart' space at the centre of the school community
- Design to incorporate social spaces
- Design to ensure security for school population including opportunities for passive supervision, withdrawal and counselling spaces for students
- Maximise the opportunities for external learning through the provision of good social and outdoor spaces
- Good quality environmental control to ensure that spaces are neither too hot nor too cold.

Other programme-wide design priorities identified during the Sfc2 visioning process include:

- Enabling transformation of education through good design
- Agility, flexibility and adaptability
- Promotion of healthy lifestyles
- Every Child Matters

- Use of sustainable design / materials /promoting energy efficiency
- Creation of a learning landscape
- Integration of facilities management with design.

Design Quality Indicators

All headteachers and school BSF leads were introduced to the concept and use of Design Quality Indicators for Schools (DQIfS) at the Change Management Group. The DQIfS framework has been used as a basis for visits to other new build schools around the north-east, with schools encouraged to consider the three key areas of functionality, build quality and impact as they walked around other new-build schools. This was done with the support of our CABA Enabler. The programme's Client Design Adviser is also identified as the DQI Lead. The Council has commissioned a DQI facilitator from the Technical Advisers (AECOM) who has worked with the sample schools to apply the DQI PfS tool during the development of their output specifications. The facilitator has produced a value profile for their school buildings using the RDI (features that are **R**equired, **D**esired and **I**nspired in a design) briefing tool. Further meetings are planned with the sample schools during competitive dialogue.

The outputs of this work, the DQI RDI Reports, will be appended to the Output Specifications alongside the schools' proposed accommodation schedules and adjacencies diagrams produced during OBC. This information, alongside the ISSfC will allow potential Bidders to familiarise themselves with the schools' requirements and aspirations to facilitate higher quality designs. We plan to arrange school level bidder sessions with each sample school in autumn 2009 shortly after the OJEU notice is published, to allow prospective Bidders the opportunity to visit the schools and meet the Design Team, ICT advisers and the headteachers, BSF team and the Design Champion. This will allow the designers sufficient time in the early stages of bidding to develop a thorough response. The Council have also factored into the main programme the minimum design standard meetings the CABA during dialogue.

3.1.4 Surveys

Once the design process was complete the Technical Advisers produced the final plans for the preferred option taking account of the various site investigations, surveys, planning, conservation issues and PfS supplementary clarification on OBC Guidance (January 2008). Further details of these considerations are set out in the table below:

Survey	Comments
Site topography and constraints	Topographical surveys have been completed for all schools in the programme. This information has been used to determine building location and calculation of costs associated with levels adjustment and retaining structures.
Abnormal considerations	Desktop investigations have been completed for all schools in the programme. The information has been used to calculate the cost of additional foundation requirements, site clearance issues and contamination.
Asbestos	The Council already maintains comprehensive type 2 survey data for all its schools. An asbestos consultant was appointed to review and update the existing type 2 surveys for all schools in the programme and these will be warranted and available to the Bidders. The final cost of asbestos removal will only be determined following an intrusive type 3 survey which will be planned and managed by the LEP. These estimates due to their nature are included in the excess

	abnormals proforma.
Site Clearance and Contamination	Site and desktop investigations have provided no evidence of historical uses or incidents that would suggest any significant contamination risk on any of the school sites in the programme. Evidence will be made available to the Bidders.
Additional foundation requirements	Desktop geotechnical investigations and topographical surveys have been undertaken to the site areas identified for improvement or new build on each of the school sites in the programme. All these surveys will be available to the Bidders. These surveys have been reviewed in respect of the impact of these findings on the costs of building. Appropriate allowances have been provided by the Technical Advisers for each of the school sites and included in the abnormals cost calculations.
Protection during construction	The cost of protecting the school from the building operations will form part of the normal costings for construction works. Where partial demolition is required and the remaining building is required to continue teaching and learning, additional protection has been allowed to mitigate the effects of noise, weather and air pollution. In these instances where part demolition may be the solution, additional funding has been included in the abnormals costs calculations. These costs are provided by the Technical Adviser and are appropriate to the potential requirement. The cost allowance included will provide temporary protection that will be watertight and insulated and will consider security and acoustic requirements.
Archaeological information	The Council requested details of any investigatory work required on any of the BSF sites from Tees Archaeology. No sites require any special archaeological work prior to construction. Concern was, however, expressed about the interesting nature of Grangefield School. Tees Archaeology requested that a detailed plan and elevation survey was to be undertaken with photographic records prior to demolition commencing.
Acoustic surveys	Acoustic surveys have been undertaken at all schools in the programme. The information has been used to inform the design and make financial provision for additional acoustic measures.
Planning and conservation issues	Extensive engagement with the Council's Planning Department has been undertaken to ensure the deliverability of the proposals. Where necessary, the proposals have been refined. Following discussions with officers in the Planning Department and Conservation teams, it was agreed that planning briefs would be completed for the sample schools Ian Ramsey CE and Bishopsgarth prior to OBC submission; the aforementioned briefs have now been approved by the planning committee. It was also agreed that a planning brief would be produced for Grangefield school (phase2) due to the age of the School and that Westland's school is to be co located on the site. Public consultation was carried out as part of the planning brief process for the sample schools and will also be carried out for Grangefield. Letters of comfort have been received for the remaining schools in our later programme. The results of all the planning consultation will be available for the Bidders. With regards to conservation issues, various ecological studies have been undertaken as part of this process. Due to the length of the programme before construction works will commence on any one of the school sites,

	appropriate plans have been put in place to mitigate these risks.
Ecological and Arboricultural Surveys	A scoping review of environment on all sites has been undertaken as part of the general survey works. No specific Ecological issues have been raised that will effect the proposed developments in terms of planning requirements.
Security during construction	An early assessment would suggest that it will not be necessary for the contractors to provide additional security measures during the construction phase beyond that which would normally be provided.
Mains utilities and service connection	Searches for all mains utilities on and in the vicinity of the site have been undertaken for all the schools in the programme. Major diversions of services have been avoided wherever possible. Where diversions are required then a financial allowance has been included.
Highways works	Consultation with the Council's Highways Department has been undertaken as part of the planning consultations for all the schools in the programme. Where improvements to school access have been identified, an allowance for work has been included in the abnormal costs calculations.
Condition Surveys	Condition Surveys have been undertaken for all premises in the BSF programme. The initial findings were used to develop the school and site selection to enable the control options to be drawn up and costed.

3.1.5 Land Disposal

Any land within the Council's ownership which becomes surplus to requirements resulting from the closure or relocation of schools within the BSF programme will be disposed of with the intention of generating the maximum capital receipt. Where necessary planning permission will be sought for the most appropriate alternative use, prior to marketing in order to assist in achieving this goal. Where surplus education land resulting from the programme does not fall within the Council's ownership (for example in relation to a voluntary aided school) terms will be negotiated with the owners to maximise, where possible, the contribution from the disposal of those properties back to the Council.

3.1.6 Sustainability

The Council is committed to a twin track programme of sustainability and carbon reduction. The Council is committed to sustainable development and as an initial benchmark requires a BREEAM assessment for all new and remodelled schools. A design level of excellent is to be aimed for, with a minimum achieved level of very good. As a client the Council will actively assist in the delivery of efficient and sustainable schools. The provision of re-used and recycled materials and specifying A-rated products from the BRE green guide will be implemented wherever possible.

The Council is also undertaking a programme to reduce CO₂ emissions from its buildings by 25% prior to 2013 from a baseline of 2006. BSF is an opportunity to develop this programme. It will be expected that all new schools' CO₂ footprints will be reduced by at least 50%. New efficient heating plant, reduced lighting cost, improved IT and operational efficiencies will drive the BSF delivery programme to give a substantial CO₂ emissions saving. Use will be made of the Pre Design Carbon Calculator to ensure savings in CO₂ can be delivered.

On-site generation of energy will have to be considered on all sites in order to reduce the overall carbon footprint.

3.1.7 Phasing

A review of the work proposed at all schools in the programme has been undertaken to consider disruption to pupils and timetabling, buildability of the proposals and phasing of the works. Key considerations have been the functionality of the school and disruption to students and staff. Consideration has also been made of the use of existing and new-build facilities to reduce the amount of disruption and avoid the requirement for decant. Schools have also contributed to this process. This has allowed us to identify the likely requirement for decant accommodation. Four schools have been identified where this may be required and an assessment of this requirement determined from a combination of space taken out of the school to enable the building works to proceed and surplus accommodation within the remaining school derived from re-timetabling. There will be a balance between the amount of disruption and required decant accommodation but this will not be determined until dialogue with Bidders commences. For the purposes of the financial appraisal, estimates for the costs of providing decant accommodation have been provided by Technical Advisers and included in the abnormal cost calculations.

Areas for demolition have been identified as part of the preferred control option. Due to the nature of the work and the variation and condition of building form, estimating demolition costs is difficult. For the purposes of the financial appraisal, estimates for the costs of demolition have been provided by Technical Advisers Rex Proctors and included in the abnormal cost calculations. A review of all potential areas of demolition has been identified and incorporated in the phasing drawings.

The following Gantt chart summarises the phasing timeline school by school as detailed in the full programme:

Stockton BSF Proposed Start and Completion Dates

ID	Task Name	Duration	Start	2010	2011	2012	2013	2014	2015
				Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4
1									
2	PHASE 1								
3									
4	Ian Ramsey CE	480 days	Mon 02/05/11						
5	Bishopgarth	480 days	Mon 02/05/11						
6									
7	PHASE 2								
8									
9	Stockton Academy	349 days	Tue 01/05/12						
10	Thornaby Academy	349 days	Tue 01/05/12						
11	Grangefield	438 days	Tue 01/05/12						
12	Abbey Hill	176 days	Tue 01/05/12						
13	Northfield School	488 days	Tue 01/05/12						
14									
15	PHASE 3								
16									
17	Westland's	321 days	Fri 03/01/14						
18	Our Lady & St Becket RC	498 days	Wed 01/05/13						
19	Bishopston PRU	176 days	Wed 01/05/13						
20	St Patrick's	238 days	Tue 03/09/13						
21	St Michaels	438 days	Thu 27/03/14						

Remodel / Refresh
 Summary
 Rolled Up Progress
 Project Summary
 New Build Element
 Rolled Up Task
 Split
 Group By Summary
 Milestone
 Rolled Up Milestone
 External Tasks
 Deadline

3.1.8 School Support

Schools and Governing bodies have given their support to the programme through a series of consultation events. All Wave 6 schools have signed a letter of commitment. Schools in the later Wave have also been fully involved in the programme process and have signed a letter of comfort.

3.2 Sample Schools

The rationale for the selection of Stockton-on-Tees's sample schemes was outlined in Sfc2. The sample schemes have not changed and are confirmed as Ian Ramsey Church of England Comprehensive School and Bishopsgarth School Maths and Computing College. Ian Ramsey and Bishopsgarth were selected with elements of new build, major and minor refurbishment and are both challenging schemes from an educational transformation and design perspective, with the desire for shared facilities. Due to the timescales for the development and approval of the Academies, it has not been possible to include a new build school as a sample. (The two Academies are the only two new build projects in the Wave.)

Both schools scored highly in the Council's prioritisation matrix, particularly on educational need. The sample schools also address many of the programme-wide objectives as stated in section 2.1 and so reflect Stockton-on-Tees's overall programme well. This incorporates the revised schemes for Westlands and the inclusion of Northfield, St Michaels and St Patrick's. The proposed remodelling and refurbishment of Northfield will be built as part of Phase 3 of the construction programme. The proposed new build and remodelling of St Michael's and remodelling at St Patrick's will also be built as part of Phase 3. As set out in Sfc 2, the Pupil Referral Unit (Bishopton Centre) will be included in Phase 3. The centre will relocate to the adjacent Wrensfild House after completion of works.

3.3 Sample Schools - Delivery of Sfc

Bishopsgarth School has transformed itself from a school in challenging circumstances to a good school with outstanding features (Ofsted 2007) and now aspires to be judged outstanding at its next inspection. KS2-4 CVA scores (consistently the highest in the Council) place the school in the top 100 of most effective schools in the country. Results in the core subjects have shown year on year improvement, and Fischer Family Trust D targets have been exceeded. This is an impressive achievement for a truly inclusive school with 42% of local children living in workless households, entitlement to free school meals at 32% and high levels of obesity, smoking and alcohol misuse in the local community. Bishopsgarth is already doing much to close the performance gap between schools in deprived areas and those in more prosperous environments, a key element of the local Council strategy for BSF. The school has a clear vision of its future as an outstanding school in educational outcomes and learning environment, having a major social impact on the local area, improving attitudes to learning, aspirations, progression to further and higher education and parental engagement.

Bishopsgarth is an innovative school with a strong commitment to inclusion, ICT, a personalised and creative curriculum, and to making a real contribution to the life of its local community. Inclusion and the curriculum were rated outstanding by Ofsted. The school's vision for BSF includes a purpose-built Learning Resource Centre to facilitate individual learning and allow pupils of all abilities to make rapid progress in raising their reading age (a key local target). It will include a Parent Support Base for families to work with their children at a pre-arranged literacy timetable & also develop their own skills, enabling them to become partners in learning.

BSF will enable Bishopsgarth to develop further the successful Leading Edge programme in collaboration with feeder primary schools, and extend the stage-not-age model which sees KS4 work introduced 12 weeks earlier than the traditional model.

Inclusion is central to the school's values in a calm, purposeful learning environment where every member of the school community is valued. Up to 40 students with a range of complex and additional needs (including physical disability, MLD, ASD, ADHD and BESD) are fully integrated into mainstream school with additional support available in a special unit. The Learning Resource Centre will cater specifically for the needs of target groups: boys; students with special educational needs, and the gifted & talented.

As a specialist maths & computing college, Bishopsgarth is already leading on delivery of the Diploma in ICT and will also lead on Environmental and Land-based Studies. Other Diploma lines will include Society, Health & Development (in collaboration with Stockton Riverside College) and Sport & Active Leisure (in collaboration with the proposed Stockton Academy).

The Individual School Strategy for Change produced by Bishopsgarth School sets out its key objectives which are entirely consistent with the Council's BSF vision: developing a learning community; a creative, personalised curriculum with progression pathways appropriate to individual needs; a healthy community; and contributing to the development of a skilled and innovative workforce. The importance of change management is well understood in this successful school which has recently completed the transition to a new headteacher and restructured leadership team.

The Remit Meeting raised no issues in relation to Bishopsgarth School.

Ian Ramsey Church of England School is a Voluntary Aided mixed comprehensive school judged by OFSTED (2007) as 'a good school with outstanding features.' Some 6.8% of Ian Ramsey students are of ethnic minority origin (almost twice the local Council average but well below the national figure), and some 5% of students speak English as an additional language. These features allow Ian Ramsey to make a unique contribution to the diverse range of schools in Stockton-on-Tees.

The Individual School Strategy for Change produced by Ian Ramsey School sets out KPIs and objectives for BSF that are fully consistent with the Council's strategy: transforming learning (including a personalised curriculum, redefining the role of the teacher, and greater use of ICT); a fluid curriculum in three phases (transition, consolidation and qualification); developing the workforce; transformational ICT; and extended services.

As a Specialist Language College with two successful re-designations, Ian Ramsey will lead on delivery of the Languages Diploma and will also offer the Creative & Media Diploma in collaboration with Stockton Riverside College and the proposed Thornaby Academy.

The school has given much thought to change management with a focus on distributed leadership. A Change Management group has been set up within the school comprising of representatives from the governors, SLT, teaching staff, support staff, parents and students which has been involved in the DQI process and visits to other BSF schools.

The Remit Meeting raised no issues in relation to Ian Ramsey School.

[Table omitted as commercially sensitive to the Council.]

The 3 Stockton Secondary schools that are in a later wave have signed letters of comfort regarding the ICT Managed Service. In addition two of these later wave schools are actively represented on the ICT workstream group and will take a full role in the procurement process. It is envisaged that these three schools will have joined the managed service at some stage after financial close at their own cost and, because of their involvement in the procurement process, should be able to give a commitment to this prior to financial close.

3.4.2 Headline Vision for ICT

The Council has worked with its schools and other stakeholders to develop a vision for Campus Stockton that has technology integrated through and embedded within it, in order to achieve the high and sustainable level of transformation we desire. The Council's vision for ICT is articulated through the Campus Stockton Educational ICT Strategy developed collaboratively with schools and other stakeholders to capture the diverse and collective ambitions for education in Stockton-on-Tees:

Personalisation of Curriculum and Learning – personalised learning and a creative curriculum supported by extensive use of ICT will close attainment gaps and ensure improved performance by all students. We will transform how people learn by harnessing the full potential of new technology across all subjects to promote well motivated youngsters. We will embed the use of ICT in assessment more appropriately within learning and teaching to support the raising of attainment by utilising an integrated assessment and tracking system which supports day to day, periodic and transitional assessment models. Our use of ICT will help focus schools on learning rather than teaching and help tailor education to individual need, interest and aptitude. Via the use of a common Learning Platform and access to a range of devices, we will engage learners in what they want to learn and how they learn, as well as encouraging better self-assessment and providing pathways to learning through creative & social interaction.

What this will look like:

- learners will be able to access a personal learning device at a time, for a duration and at a location they require
- this device will give them access to the Campus Stockton common Learning Platform where dynamic individualised learning pathways are provided along with a host of collaboration and assessment tools
- a wide range of high quality, interactive digital assets will be available to support learning
- this device will also allow learners to safely access the Internet and perform routine ICT tasks
- higher end devices will be available for learners to work with video, audio and other graphically and processor intensive applications. This will be supported by appropriate, high quality peripherals
- to encourage the development of creativity, a wide range of technologies will be used across schools according to their needs and specialisms
- an integrated tracking and assessment system will facilitate day to day, periodic and transitional assessment across Campus Stockton

Inclusion and Special Educational Needs – Campus Stockton recognises that inclusive learning is a process of increasing the presence, participation and achievement of all learners. If the provision is right, everyone will be included – and ICT can help achieve this. Focused provision for gifted and talented learners is offered through collaboration among specialist schools and colleges.

What this will look like:

- learners with Special Educational Needs will be fully catered for so that they can enjoy learning and feel that everything they do is exciting and relevant to them
- some learners will use assistive technologies with provision matching individual requirements. Supportive software is always available to enable all learners to access the curriculum
- ICT will be the medium through which learners who (for whatever reason) cannot be in school can maintain contact with education
- the motivational aspects of ICT will be used to enthuse reluctant and disengaged learners, particularly through use of the common Learning Platform with its supporting range of appropriate digital assets and collaboration tools, and access to a personal learning device. They will be able to learn in ways that best suit them and encourage creativity
- ICT will support transitional learning spaces, developed for vulnerable pupils and those with LDD
- improved collaboration between all agencies and extended services will be facilitated by the Campus Stockton approach to ICT
- every opportunity is taken to narrow the digital divide including supporting initiatives such as Home Access to Technologies

14-19 Continuity – The embedded use of ICT will enable learners to easily access a variety of pathways from the age of 14, utilising multi-site and virtual models of study, making effective use of ICT to track and assess learners' achievements and ensuring that a much richer picture of progress is provided.

What this will look like:

- there are fully joined-up ICT systems across Campus Stockton either through common systems or interoperability where most appropriate in order to promote the "team around the child"
- organisations, learners and stakeholders in education and training will have a much clearer picture of a learner's progress through effective sharing of data
- the effective use of an e-portfolio will promote reflection, personal learning and thinking skills
- learners can access content and information from a variety of learning providers
- extended opportunities for learners will be provided by interactive simulations and communications with vocational experts through use of video conferencing and virtual classrooms
- the Campus Stockton Learning Platform enables learners to access their individual learning pathways when and where they require, including Diploma lines of study
- collaboration between learners is commonplace and effective, supported by a range of collaborative learning tools provided by the common Learning Platform
- a Campus Stockton approach to a common ID system will facilitate e-registration, access to catering, library and print services
- learners have the same individualised desktop experience, including access to their data, applications and files, regardless of the school in which they are working at any given time, and a centralised data, tracking and assessment system enables staff access to relevant and authorized student-level data

Wider Children's Services Agenda – ICT will support the aims of the various agencies and organisations working to realise the Stockton-on-Tees Children and Young People's Plan and Every Child Matters agenda.

What this will look like:

- data is transferred between other relevant Council systems automatically with no manual intervention
- the eCaf and Contact Point systems are available to appropriate staff via secure ICT access and in line with Caldicott best practice guidance
- the health and wellbeing of learners and the community is supported by the availability of guidance on the Learning Platform and via video conferencing
- in conjunction with the Home Access to Technology programme, steps are taken to narrow the digital divide
- learners are safeguarded in line with LSCB policy, protocols and practices

It is essential that systems procured and installed do not impact negatively on the accreditation of schools with regard to security and contactpoint. We will work with our ICT partner to ensure this.

Management and Administration – ICT should provide efficiencies (financial and time) and enhanced effectiveness for those engaged in the management and administration of schools. A Campus Stockton approach will be taken and the management and administration system should integrate with other areas of the service.

What this will look like:

- there are fully joined-up ICT systems across Campus Stockton either through common systems or interoperability where most appropriate in order to promote the “team around the child”
- a common MIS system exists across Campus Stockton which will integrate with/be interoperable with other Council back-office systems such as those provided by finance. This will reduce duplication and increase consistency of data
- security of data is managed in compliance with legal requirements and best practice
- a Campus Stockton approach to a common ID system will facilitate e-registration, access to catering, library and print services
- the Management and Administration system will enable real-time reporting to parents of many measures to enable parents and carers to track their child’s progress
- integration of data with the Learning Platform ensures ready access to tools and resources for learners, staff and parents/carers

Continuing Professional Development and Change Management – Campus Stockton –Transforming Learning has been illuminated by the Individual School Strategy for Change documents by promoting new ways of working within each school. ICT will offer new ways of supporting parents, learners and employees. We will enable all staff to become effective ICT users and innovators. We will develop our workforce by providing learning activities that increase confidence and competence in the use of ICT in the workplace, for leisure and at home.

Change Management, staff training and continuing professional development is a critical part of supporting Campus Stockton. Transforming Learning using ICT will not wait for the BSF programme investment. We are therefore working now with individual schools to develop a Change Management Strategy that will then be reviewed annually.

What this will look like:

- change management that supports the development of teaching and learning models away from the didactic towards pedagogies which support a range of learning styles through the use of interactive technologies, the use of digital media and independent, student-led approaches to tasks
- comprehensive opportunities for engagement in ICT active research, trial environments, pilot testing programmes and emerging technology updates
- the sharing of good practice is supported via local streaming of video assets and local podcast production and serving. In a number of schools a video-enabled learning space captures effective classroom practice which is then shared across Campus Stockton
- all schools make full use of the Next Generation Learning Charter to inform planning, become and sustain e-maturity
- innovation in ICT is thriving at both school and Council level, facilitated by true partnership working between all stakeholders
- a blended learning approach is taken towards change management, utilising collaborative tools, video conferencing, virtual classrooms as well as face to face methods

Community Access and Use of ICT Resources - Our vision of Stockton-on-Tees is a vibrant community with new and refurbished buildings providing inspirational focal points for lifelong learning in the community. We aim to ensure that all ICT resources, both real and virtual, will be maximised for the benefit of all in the community. Schools will develop as the hub of the community they serve, offering a range of extended services, adult learning, performance facilities, library facilities, sports provision and links with other partners.

What this will look like:

- schools will become the clear centres for lifelong learning
- we will provide access to school resource centres, available within and outside of school hours. Specialist ICT resources will be available to all learners, particularly in the area of Creativity and Media where the cost of equipment is often prohibitive
- e-Learning/blended learning is integral to the delivery of courses provided to the community
- creative building design, extended opening hours and creative timetabling enable the most to be made of resources
- every school plays a full part in the provision of informal and family engagement opportunities
- non-school owned devices can connect to the school network in a safe and secure way

Implications for Design of Physical Environments for Learning - Our aim is to work towards a common digital infrastructure to support transformation and reform. We will implement media-rich, flexible, multi-purpose learning spaces of various sizes, designed to engage all learners. The supporting ICT infrastructure will be optimally integrated into the architectural design, capable of being regularly refreshed, and a wide range of learning-appropriate devices will operate seamlessly on demand. Real and virtual environments will blend to provide a first class experience for all learners.

What this will look like:

- the design solution provides for a fast, resilient wired and ubiquitous wireless network infrastructure able to accommodate future changes and developments in technology and the curriculum
- each building and the ICT within it works together seamlessly

- opportunities are taken to converge applications. A multi-service network provides reliable, high performance data, voice and video over hard-wired and wireless systems. This includes an effective email/messaging system, IPTV and display services
- every learning space is supported via an audio/visual solution to facilitate the interactive delivery of digital assets

3.4.3 The current ICT context

Schools currently procure ICT equipment and technical support themselves from a range of sources, and the majority of secondary schools directly employ one or more technical staff. BSF will enable the provision of a single, high quality ICT service across Campus Stockton that will allow all learners to benefit from the transformational potential of ICT regardless of the institution they attend.

We have encouraged schools to focus on the key aspects of ICT needed in an e-mature learning establishment, as defined by Becta, through engagement with the Becta Self Review Framework, now Next Generation Learning Charter (NGLC) criteria. We have also created online surveys for both learners and staff referencing their use of ICT. The sharing of this work with BSF Bidders and the eventual ICT Partner will provide early shared understanding of the current position and future aims of the schools. The NGLC will provide the baseline against which schools will plan for the strategic development of ICT.

The Council will adopt the PfS standard model of an area-wide, ICT Managed Service contract through the LEP that will seek to build on and integrate existing provision where this offers best value and service effectiveness.

Schools have agreed to an ICT Managed Service, and are committed to working together to ensure that they develop a service that meets their needs and adds extra value such as enhanced ICT, technical support and learning resources. The service will be for all schools, but we stress the need for a service tailored to each individual school, that recognises their differing needs and aspirations. Both the Council and Stockton-on-Tees Schools have a long and successful tradition in ICT innovation and feel strongly that this must continue to be nurtured. The Council believes a combination of the expertise and innovation of an ICT industry partner combined with the knowledge and understanding of our best local provision will deliver a world-class service that allows the transformational power of ICT to be harnessed.

Secondary heads and school leaders have all had specific input on the benefits that a single ICT service will bring to their schools and their learners through their direct participation in the Change Management Group as well as at a senior level on the Council's ICT Task Group. These groups have contributed significantly to developing the Strategy for Change, OBC and ICT Output Specification. The groups have been consulted on the development of the Campus Stockton ICT Strategy and workshops have been and will continue to be held on factors that influence the ICT service such as the Learning Platform and innovation. We would expect our ICT Partner to be able to work with the Council in taking our developed teaching and learning practice to the level where all learners reach their full potential.

The ICT Task Group will have a key role in managing the transition from the current practice to the new Managed Service. Schools are already reviewing their ICT support structures with a view to restructuring if necessary, ensuring that their technical support roles are consolidated as far as possible and distinct from other non-technical support roles in order to make the transition to the Managed Service as effective and efficient as possible. As part of the ICT Partner's change management delivery, operational training will be provided on the effective use and management of the ICT service. The Group will play a key role in supporting the Council in contract management once the service is operational, ensuring that the service that was requested through the ICT Output

Specification and ICT Services Contract is the one that is delivered and successfully meets all functional requirements.

3.4.4 Funding for Special Schools

Whilst the BSF capital funding is allocated on a per pupil basis, the total grant will be amalgamated into a single fund which will be used to implement a solution across the whole school estate. This means that the special schools will be provided with the same level of infrastructure and hardware as is available to the larger schools.

In the cost model the special schools are allocated on-site servers and infrastructure to the same level of functionality as mainstream schools – which means that the per-pupil investment on these items is higher in the smaller schools. The model also provides for one device per teacher and admin staff, which again skews the per-pupil investment towards special schools.

For operational Managed Services, the selected Managed Service Provider will be required to provide appropriate support to all schools, and will address the key performance indicators agreed in the contract. It is likely that special schools will wish to use their enhanced ICT funding to purchase additional equipment or support above and beyond that of the agreed contractual terms. Bidders will be required to confirm that they will provide an appropriate mechanism to support this flexibility.

3.4.5 ICT and General Sustainability

All secondary heads have attended ICT-related workshops, in which the Educational ICT Strategy, Total Cost of Ownership (TCO), ICT Managed Service and the integration of Facilities Management (FM) and ICT have been covered. They have been fully involved in the Council's BSF ICT plans and requirements and have consulted with their stakeholders. These plans have received approval and there is a real shared understanding of the way forward for the development of ICT to support Campus Stockton, and within that, school and Council priorities.

All schools have undertaken Total Cost of Ownership work, supported by our ICT Advisers. This work illustrates the link between educational aspirations and technology investment transparent and will be used in ongoing ICT financial planning. It also highlights the opportunities for the economies of scale that can be brought about by aggregation and has helped to reinforce commitment to continued long term investment in ICT.

In order to ensure the long-term sustainability of the programme and to make the most from the BSF investment in ICT, a comprehensive change management programme will provide for the continual development of our workforce and their use of ICT. We will develop a collaborative partnership approach with the various Council Departments, CLCs, schools and the ICT Partner developing CPD and support programmes together. This will include operational, curriculum and administrative training as well as the opportunities for ICT active research, trial environments, pilot testing programmes and emerging technology updates. An evaluative approach will be developed to monitor the change management process and ensure best value is achieved. Through this process, teachers and support staff will become comfortable with the use of ICT as a teaching and learning tool and be confident to make effective use of ICT which is fully embedded in practice.

3.4.6 ICT and Environmental Sustainability

The Council's proposals within the ICT Project, involving rising numbers of powered devices, could increase the amount of energy that is consumed within its schools. The Council will challenge our

ICT Partner to deliver solutions that help to meet its carbon reduction commitment. In particular the Council is keen to develop innovative solutions that:

- aggregate services to minimise replication of hardware and heat extraction requirements
- provide networked tools to remotely manage and shutdown computers, projectors and other peripherals

The development of Campus Stockton-wide systems may also provide opportunities for the Council to reduce energy use as well as providing a lower Total Cost of Ownership.

The Council will work with the ICT Partner to develop good practice in the use of ICT, educating staff and learners on how to minimise environmental impact from their ICT use, for example, through developing use of collaborative technologies such as virtual classrooms and video conferencing for CPD, meetings and direct teaching to reduce amounts of travel. Maximising the amount of teaching resources, administrative and management information available via centralised systems, including the Learning Platform, with accessibility from any connected device, will also help reduce travel and paper consumption. Displays throughout each school providing data and feedback directly to learners and others will develop their understanding of sustainability, and opportunities will be sought to exploit the use of this data within the curriculum. The most effective changes are those made by individuals, and the Council will expect the ICT Partner to work to enhance staff and learners' understanding of their individual role in sustainability.

3.4.7 Sustained improvement in educational performance indicators

Our initial and ongoing investment in ICT will lead to sustained improvement in educational performance. It will allow us to put appropriate technology in the hands of learners at a time, in a location and for a duration that they require.

We want to ensure that the creative and efficient use of ICT is embedded in curriculum practice, with learners and staff feeling empowered by access to a range of devices, applications and tools. This will have a sustained impact on standards supporting a more motivating, challenging and personalised curriculum for all learners but particularly for those currently disengaged from their learning.

An integrated assessment and tracking system across Campus Stockton will better inform us about our learners. With enhanced analysis of this data, we will develop early, effective intervention strategies and support frameworks to ensure learners succeed. The system will also allow for the close tracking of progression of all learners in Campus Stockton by a range of professionals within and across institutions. This will support the development of planning for progression, periodic assessment and will impact on transitional assessment.

These early intervention strategies will not only be at student level but also at staff, curriculum, school and consortium levels.

The CPD of school and Council staff is central to the transformation of learning and teaching. This will be ongoing in order to sustain the momentum of pedagogical development. Operational skills for new technologies will continue to be provided in order to sustain user capability. A comprehensive migration and training programme for the common Learning Platform is essential. We will work in partnership with our ICT Partner to develop a CPD programme that is both focused on the pedagogical aspects of the ICT solutions as well as the initial introduction of operational and technical ICT skills. We expect the effectiveness of the CPD to be reviewed and inform the ongoing review of CPD needs and provision for the following year.

We will have much greater insight and understanding of the role that ICT plays in this transformation through the development and deployment of a common set of key evaluative, analytical and planning tools.

All schools are developing their use of the Becta Next Generation Learning Charter. This tool will allow all Campus Stockton schools to benchmark themselves against others nationally, identify what they do well in addition to the areas that they need to develop and provide action plans against. It will also ensure effective decision making about ICT across and between learning establishments now and in the future.

Schools will also develop their use of the Engaging Parents in Raising Achievement toolkit to allow them to monitor and action plan for improved use of technology in the home as well as at school. By Sept 2010, all Stockton Secondary schools will provide online reporting to parents and we would expect our ICT partner to further develop this capability.

3.4.8 Long term financial sustainability

The current process that schools are going through as part of the BSF procurement, including Total Cost of ICT Ownership work and their developing use of the Becta Next Generation Learning Charter will lead to a long-term, sustainable model for ICT planning and funding that aligns school priorities with sustained investment

Bidders will be required to demonstrate that their proposed system will support incremental growth throughout the contract period and beyond, ensuring that there will be no need for radical changes to the solution, and allowing new technologies to be cost effectively incorporated into the solution.

The budgetary cost model indicates that a significant proportion of the programme funding will be available to support on-going refresh, with additional refresh funding to be provided by schools as required after the initial contract period.

Sustainability will be further supported by the effective usage of legacy equipment. Bidders will be required to demonstrate a commitment to the incorporation of user equipment and Audio-Visual equipment, allowing a reduced initial spend on equipment, and therefore enhanced provision for refresh.

3.4.9 Change Management and CPD

BSF investment in buildings and ICT will be supported by a rigorous change management process to create e-mature schools. As this will form part of the overall change Management strategy (see section 7.2), the process of developing this is under way through the Change Management Group, ICT Task group work, An understanding of needs will come from schools' continued use of the e-Maturity Becta Self Review Framework (Next Generation Learning Charter) and the development of online questionnaires. We will expect the chosen ICT Partner to enable and encourage schools to explore innovations in ICT hardware, software and pedagogical practice. Robust ICT infrastructure will support different models of learning, facilitate migration to new curriculum and pastoral arrangements, shifting pedagogy from subject-based, teacher-led delivery in classrooms to more experiential and creative learning. Schools will be supported in attaining the ICT Mark through the Becta Self-Review Framework (Next Generation Learning Charter).

We will require a distributed, broad and innovative curriculum, available anywhere, anytime. The system created will allow for:

- engaging, self-directed learning
- collaborative learning
- teacher-facilitated learning
- changes in delivery and learning style commensurate with each individual learner's needs
- high quality digital content that will enhance students' e-learning
- easy sharing of good practice among professionals and learners
- the minimisation of administrative burdens on teachers and other professionals

The personalisation of learning provided by the system will be algorithmically driven to ensure that resources are easily accessible. In some cases automatically, presented to students based on assessments made or triggered by the resources selected as they work.

BSF investment in buildings and ICT will secure improved ECM outcomes for all students. Multi-agency professionals will have secure ICT access on site which is in full conformance with Caldicott best practice guidance. The systems developed will ensure that ICT facilitates and supports early identification and timely intervention. Enhanced learning opportunities will be provided for all children including those with additional needs. Where required, the system will be provided with suitable assistive technologies and interfaces that deliver a learning experience and content which is appropriate to each student's level, needs and learning styles. ICT systems will enable the sharing of data, targets and assessments in support of local benchmarking both within and between schools. They will have a key role in identifying the progress of individuals and groups in relation to their peers so that we can ensure that no child is left behind.

Our aim is for all professionals' CPD needs to be recognised and supported to promote the highest professional standards possible. We will require the ICT Partner to work closely and collaboratively with School Improvement Service Advisers and consultants, CLCs, the ICT Task Group and school leadership teams in the planning and delivery of CPD. The chosen partner will work with Council departments and schools to develop CPD schemes that enable all staff to become effective ICT users and innovators in the context of new learning practices. The ICT Partner will develop an online system of CPD that supports and develops best practice in schools through ongoing training, cross-sector mentoring, access to relevant resources and active professional networks. The system should contain algorithms that enable the system to be proactive in identifying key groups and tagging appropriate resources to meet specific needs. Examples of expected provision include:

- local streaming of video assets and local podcast production and serving
- video-enabled learning spaces which can capture effective classroom practice
- ICT systems to facilitate coaching and mentoring as part of individual needs
- individual and corporate information to maximise efficiency of CPD across the Council
- proactive advice at individual and corporate level opportunities for CPD and full details of how to best avail oneself of them

3.4.10 Options Appraisal MIS Support

The Council carried out an options appraisal for the provision of MIS support for Wave 6 and later wave schools.

MIS support for schools is currently provided by a team of three FTE employees who support primary, secondary and special Schools. The team also supports the Council (CESC) Management Information Service, manages machine upgrades, and provides support during exams and the pupil and workforce census. Data is transferred weekly from school SIMS systems to the central Capita One system for use by Council teams including SEN, governor support, admissions, free meals and attendance and inclusion. The ICT support team provides bespoke support to schools in various

specialist areas including exam entries and results, year-end procedures, assessment manager timetabling and training.

The options appraisal identified two key issues to be addressed by the support service: firstly the provision of support to ensure that all schools can use the MIS system to its full potential (including reporting to parents, assessment manager and behaviour management); and secondly, the production of quality management information in an appropriate format for the DCSF and other stakeholders as required. The Council identified two options for consideration. The procurement of SIMS support services from the selected Managed Service Provider (with TUPE of staff as appropriate) and the provision of SIMS support services by the existing Stockton-on-Tees team

After consultation with stakeholders, it was decided to retain of MIS Operational Support within the in-house ICT support team. The annual user survey shows high levels of satisfaction with the current in-house team and indicates that the service from the in-house team is effective and efficient. The team seeks to continuously improve and conducts user surveys accordingly. They recognise that use of the MIS system in schools can assist with school improvement and transformation and support schools in this process.

There were three significant considerations which impacted on the decision:-

- The support service provides information which is channelled throughout the broader Children's Services operations. The processes and procedures are well understood by the school support team, the COUNCIL support team and by the school staff involved, and any significant changes to processes will have a significant impact on the overall effectiveness of the information flow. Across CESC, the same systems are used, ensuring the Integrated Service Areas (ISAs) and schools have a strong synergy. The Stockton-on-Tees Borough Council Joint Area Review (JAR) report produced in 2008 states *outcomes for children and young people in Stockton-on-Tees are good* and the APA reported that *"Management information is used to extremely good effect in schools and centrally"*. The JAR report also states *"The quality of strategic thinking, high levels of reflection and analysis, and excellent use of management information are clearly evident throughout all documentation."* Stockton-on-Tees also maintained its place amongst the Country's top performing local authorities, retaining the maximum 4* rating, and rated by the audit commission as *"improving strongly"*. These outcomes indicate that the current solution works well, with effective information flow and data integration.
- The in-house team provides support for both primary and secondary estate. If the service were to be split into support for secondary schools (with a proportion of the team transferring to the Managed Service Provider) and support for primary schools (the remainder of the in-house team), then this would have implications for both parts of the school estate. The secondary service within the BSF programme would not have the back-up support of the remainder of the team at times of high workload, sickness, etc., and the primary support function would suffer similar issues, with the TUPE-transferred team member(s) being dedicated to BSF, and unable to support the primary school service if and when required.
- The integrated primary and secondary support service allows for consistent support and reporting, giving a range of operational and financial efficiencies. These efficiencies would be diluted if the service were split into two elements as described above. This could also have an impact on support for vulnerable children and LAC. Retaining support with the in-house team is also likely to provide a higher level of service to schools at a lesser cost to that which would be incurred via the MSP route. It is essential that all support agencies have access to good data to facilitate the integration of services at ground level in schools and

ISAs. In addition, the effective transfer and understanding of cross-phase data is required to support effective transition between primary and secondary stages.

Prior to finalising the MSP contract, the Council will agree a formal performance measurement regime for the in-house team, including a mechanism to address any performance issues. The Council will also develop a table of dependencies, responsibilities, and interface processes between themselves and the Managed Service Provider.

3.4.11 Broadband

The Council does not envisage procuring Wide Area Broadband connectivity through BSF as a high class, resilient network is already in place via the regional broadband consortium, NGfL, that will allow schools to meet their BSF aspirations. We expect Bidders to undergo due diligence regarding this situation and inform us of any issues which may arise. Currently, network managers monitor web usage using the cache pilots provided by the NGfL system and we expect this monitoring to continue as part of the Managed Service.

The model in the table overleaf is an example of the ICT Managed Service the Council will be seeking to be provided in partnership with the schools. During the procurement process, Bidders will identify how they can provide best value for money and may propose alternative categorisation of these examples.

ICT MANAGED SERVICE			
On-Site Central Procurement of Equipment/ Services Based at School Sites	Off-Site Shared Services Managed and Located Centrally	Change Management Collaborative Coordination and Delivery	Local Choice Specialist Requirements and Enhancement Options
<p>EXAMPLES</p> <ul style="list-style-type: none"> • Single School Local Area Network • Wireless Network • Local Servers & Server Software • Staff and Student Devices • Device Software Licenses (OS, productivity software) • Classroom AV / Interactive Equipment • Digital Signage • Printers • IP Telephones • Common ID System (i.e. smart cards, biometric) <ul style="list-style-type: none"> ○ Cashless Catering ○ E-Registration ○ Library Resource Management ○ Print Release • Integration of Legacy Equipment • Installation • On-Site Engineer(s) • Break/Fix Service 	<p>EXAMPLES</p> <ul style="list-style-type: none"> • Central Server Farm • Central Switches • VOIP Telephony • Firewall • Backup • Virus Protection • Single Sign-On • User Account Management • Active Directory • Remote Access (24/7/365) • File Services • Print Services • Common ID System <p>Applications</p> <ul style="list-style-type: none"> • Centrally Delivered Applications • Legacy Application Integration • Disaster Recovery • Helpdesk • MIS support • MLE support (optional) • Network Engineers • Network Maintenance 	<ul style="list-style-type: none"> • Collaborative coordination, development and delivery of change management by: <ul style="list-style-type: none"> ○ Schools ○ Council ○ ICT Partner <p>EXAMPLES</p> <ul style="list-style-type: none"> • Content Development <ul style="list-style-type: none"> ○ Training Materials ○ Learning Resources • Training and CPD <ul style="list-style-type: none"> ○ Operational ○ Curriculum ○ Administrative • ICT Active Research • Trial Environments • Pilot Testing Programmes • Emerging Technology Updates 	<p>EXAMPLES</p> <ul style="list-style-type: none"> • Specialist Equipment & Software Catalogue, .e.g. <ul style="list-style-type: none"> ○ Dartfish Software ○ ICT Training Content (for purchase) ○ Visualisers/ Document Cameras • Increased quantities i.e. increased quantity of large LCD display screens to support Student Voice • Increased specification i.e. higher-specification 17" media laptops to support specialism • Increased service requirements i.e. on-site engineer available to cover Saturday EAL classes
<p>Refresh Contribution to Refresh of Equipment and Services after contract end</p>			

3.5 Facilities Management

Stockton-on-Tees recognises the significant investment in its schools through BSF and will safeguard this by means of a structured and effective maintenance arrangement. Long-term maintenance and lifecycle costs will be incorporated into the Design & Build specifications. The following is a summary of the proposals. These have been agreed as a basis for a draft contract that will be issued before procurement.

Extensive consultation has been undertaken with headteachers and governors, and this has led to a proposal which focuses on hard facilities management (FM) and lifecycle works to maintain the buildings for the life of the LEP and beyond. 'Soft' FM services such as cleaning and catering will not be included in the arrangements and will remain the responsibility of the individual schools.

Stockton-on-Tees's aim is to ensure that sufficient funding will be committed to the maintenance of the buildings over a 25-year period. It will also ensure that the LEP has an incentive to design and build premises which are affordable and easy to maintain, and which use suitable materials. This will be achieved by means of an extended period of responsibility for defects.

Hard Facilities Management (Statutory and Reactive)

Schools will pay an annual fixed fee for maintenance including statutory testing and reactive maintenance work. This will be funded directly from schools' delegated budgets and has been calculated at a figure of █████ per square metre. The cost implications to schools have been discussed with headteachers and governors.

Lifecycle Fund

A lifecycle fund will be established for a period of 25 years and will be subject to a major review every five years. The fund will cover replacement of the buildings, windows and doors, roofs and mechanical and electrical services.

The fund will be set up on a 'sinking fund' basis and this will be held by the Council and administered in partnership with the LEP and the schools and dioceses. Schools will contribute 80% of their Devolved Formula Capital to the sinking fund. Additional funding will come from an element of centrally held school budget funded from DSG in relation to community schools plus an equivalent contribution from the Locally Co-ordinated Voluntary Aided Programme (LC VAP) in relation to the four voluntary aided schools in this wave. This will then be supplemented by a significant contribution from earmarked Council resources. These arrangements have been outlined in the governing body agreements and in discussion with Dioceses.

As part of the competitive dialogue process Bidders will be asked to produce a 25-year lifecycle fund proposal, in order that the Council can clearly see how their proposals balance the initial investment and subsequent lifecycle proposals. Priorities for investment from the lifecycle funds will be recommended by a group involving the Council, schools, and Diocesan Boards.

4 VALUE FOR MONEY

4.1 Procurement Route

The Council is committed to delivering its BSF programme through a LEP. It has agreed with Partnerships for Schools (following the submission of a non-PFI Procurement Business Case) that its BSF programme will be delivered solely through Design and Build Contracts. The Council is committed to the long-term maintenance of the BSF investment and will engage with the LEP for its delivery.

The Council's Technical Advisers have undertaken detailed options appraisals in conjunction with all the stakeholders and have produced the control options for each school within the Council's Wave 6 project.

The procurement route, phasing and nature of the project is summarised below:

School Name	Procurement Route	New Build %	Remodel, Refresh and Unaffected %	Proposed School Opening Date
Phase 1				
Ian Ramsey CE	D & B	62	38	01-03-13
Bishopsgarth	D & B	49	51	01-03-13
Phase 2				
Stockton Academy	D & B	100	0	30-08-13
Thornaby Academy	D & B	100	0	30-08-13
Grangefield	D & B	67	33	03-01-14
Abbey Hill	D & B	0	100	01-01-13
Northfield	D & B	23	77	27-03-14
Phase 3				
Our Lady & St Bede's	D & B	46	54	27-03-15
Westlands	D & B	14	86	27-03-15
Bishopton PRU	D & B	0	100	01-01-14
St Michael's RC	D & B	33	67	30-11-15
St Patrick's RC	D & B	10	90	31-07-14

4.2 PFI Analysis

No PFI projects are included in the Stockton-on-Tees programme. This is because the only two schools which could be procured via PFI are academies, and PfS guidance and standard documentation for academies procured via PFI are not yet available. The Council has therefore not produced a quantitative analysis, as discussed and agreed with PfS.

4.3 Conventional D&B Projects

All the schemes within the BSF programme will be undertaken on a Design and Build basis. This approach has been agreed with Partnership for Schools.

HM Treasury guidance on evaluating Value for Money is not relevant or an OBC requirement for conventional D&B contracts. However, the Council are very conscious that they want to see and deliver Value for Money from these contracts.

Estimated costs for schools have been prepared by the Council's Technical Advisers (AECOM). These estimates are for the preferred options outlined elsewhere in this OBC and have been used to confirm that an affordable solution for these schools is technically feasible (see section 5). The cost estimates have been prepared using benchmarking data available to our retained cost consultants from recent school construction projects, and have been adjusted using projected indices to give appropriate prices for the anticipated construction start dates.

For the sample projects, Ian Ramsay VA School and Bishopsgarth School, the competitive procurement process is the vehicle for delivering VfM to the Council. During the competitive procurement process, the Council will use a range of criteria to assist in evaluating the value for money of the bidders' solutions. Examples are set out below:

- benchmark data supplied by the Council's Technical Advisers;
- benchmark data supplied by the Council's Financial Advisers;
- data from the PfS database;
- proposed bidder derogations to the contractual documentation;
- whole life cost implications of the design solution; and
- build programme and timetable (including decant phasing).

The competitive process will be documented at the FBC stage.

The Council will follow guidance for benchmarking information and using the Council's external Advisers experience from other BSF schemes to ensure the benchmark data is appropriate, up to date and based upon closed schemes across the country. Bidders will also be required to demonstrate that their proposals set out a process for the LEP to demonstrate the VfM of its new projects/non-sample scheme proposals, for example through market testing and the configuration of its supply chain.

The Council has extensive experience in delivering major capital schemes, as do the members of the BSF Project Team. The programme will be carefully managed to ensure adherence to planned timescales and targets. Moreover, the Council will adopt the PfS standard D&B contract documents.

A Soft Market Testing Day was held on the 25th June 2009 and this was attended by over 90 private sector representatives. Feedback from this event has been very positive.

[The Council has secured signed letters from two consortia which state their confirmed intention to bid for the Stockton-on-Tees BSF project. In addition, the Council expects further consortia to bid for the project].

4.4 ICT Project

The Council has identified the scope of the ICT project in section 3.4 and the affordability of the project in section 5.

The development of the Council's Strategy for Change Part 2 document was carried out with full consultation and stakeholder input. This informed the tone and content of schools' own Strategies for Change, Consequently, the ICT Output Specification which represents the functional synthesis of these documents is a clearly linked evolution of the PfS standard documentation, detailing both the borough's and individual schools' aspirational ICT requirements and priorities. Use of experienced external consultancy to advise and work alongside stakeholders in the development of all of the above documents has helped to ensure that the ICT Output Specification is realistic and achievable.

In relation to MIS support, the Council has undertaken an Options Appraisal exercise and has taken the following decision, based on providing the most favourable value for money:

MIS Support will be divided into technical support (to be provided by the MSP), and operational support (to be provided by the Council's existing in-house support team).

The rationale for this decision is included within a comprehensive Options Appraisal document. In summary, it is recognised that technical support of the MIS solution is likely to be most effectively provided by the MSP, with their range of technical staff and experience. However the effective working relationship which has been developed between the MIS support team and the school users is unlikely to be effectively replicated by the MSP, and operational support will therefore be most effectively addressed by continuing support from the Local Authority.

The BSF team has begun to engage with the market to raise awareness of Stockton-on-Tees's programme and procurement timeline. A Soft Market Testing event was held in June 2009. There were a total of 90 attendees with potential Bidders including private sector construction, ICT companies and architects. There was a lot of interest expressed in the Stockton-on-Tees ICT Programme with a number of requests for one to one follow up sessions. It is hoped that these efforts to inform the market of the ICT project's ambitions and scope will lead to a high proportion of competitive bids which demonstrate a detailed understanding of the project through the innovative solutions they propose.

The Council has requested a contract length of seven years, phased in line with construction timescales to finish the initial contract period at the same time. This will allow for retesting of the market and ensure continued Value for Money.

In order to ensure ongoing value-for-money within the contract, the selected MSP will be required to (a) undertake a regular market testing exercise during the period of the initial contract, and (b) to provide a full value-for-money exercise at the end of the initial contract period, prior to the agreement of any contract extension.

4.5 FM Project

A summary of the proposals for FM/Lifecycle Maintenance is set out in Section 3.5 above, with more detail in Section 5.2.2. The Council, following soft market research, is confident that it can secure a robust system of regular planned and lifecycle maintenance that has the support of the schools and is affordable. The Council acknowledges that the benefits of the LEP delivering a whole-life solution from the outset, rather than "bolting on" an FM contract at a later date. During the development of the ICT solution, the Council has been conscious of the issue of risk transfer (and the associated price of transferring risk) to a private sector partner given the nature of the BSF capital investment and the mixture of new build and refurbishment across the estate.

The Council has gathered data from all the schools on current spend on facilities management and has benchmarked this against data available for BSF FM contracts. This has evidenced the level of spend that is affordable and good value for money in Stockton-on-Tees schools. It will ensure that the schools are maintained and school and Council is set at a level that is likely to be sustainable. Schools will access the FM/Lifecycle services with effect from the date of practical completion of their buildings. The contracts will run for seven years and will be re-tendered via a competitive market process. FM/Lifecycle arrangements will be subject to regular monitoring by the Council and this will include benchmarking of costs on a regular basis.

5 AFFORDABILITY

[Please note: All information in this section is draft at this stage and subject to further review in the light of the finalisation of cost/affordability information.]

The following sections summarise the estimated affordability position for the Council's Wave 6 BSF programme, although the Council understands that this OBC will only authorise the release of capital funding for the sample schemes.

5.1 PFI Projects

The Stockton-on-Tees Wave 6 programme includes no PFI projects. A non-PFI justification paper was submitted to the PfS Project Director in [July 2009] and has now been formally submitted to PfS for further consideration and approval.

5.2 Conventionally-procured Projects

This section summarises the estimated affordability position for the whole of the Council's Wave 6 Programme, but we recognise that this OBC will authorise only the release of capital funding for the sample schemes. The affordability of the capital build programme, the ICT requirements (capital and revenue), and the ongoing facilities management and building maintenance costs have been assessed separately. These assessments have been performed by comparing the costs of each element against the available funding, which will be a mixture of funding from PfS, schools/dioceses and funding underwritten by the Council.

5.2.1 Capital Costs

Capital Funding

PfS capital funding has been calculated in accordance with the Funding Allocation Model (FAM) provided by PfS using the DTI Public Construction Index at June 2009 and a location factor of 0.98 at reconciliation date 01/01/2008. This also provides confirmation of agreed exceptional abnormal funding as approved by PfS. The assessment of excess abnormal building costs was carried out by the Council's external Technical Advisers. Following agreement from PfS, this led to an increase to the funding envelope of [REDACTED]. Following a rigorous options appraisal process, the agreed FAM funding envelope has been allocated to the projects in the Programme.

The FAM also incorporates VAT funding to cover the refurbished areas of the four voluntary aided schools, where it is anticipated that a zero rating will not be achieved.

The FAM also includes the agreed carbon funding at the two new academies of [REDACTED] at Funding Start date calculated at the PfS rate of [£50]/m² for 60% Carbon Reduction funding and using the Carbon Calculator.

Capital Costs

Further design work has been undertaken as part of OBC production. This has challenged the original SFC2 submission and has developed more detailed proposals that align with the individual Schools' SFCs. The latest options have been included within the Control Option drawings and schedules of accommodation, which are included within the appendices.

A full range of surveys has been undertaken and these have been warranted where necessary. The costs identified in the original SFC2 have been modified to take account of the findings of these surveys. The results of these surveys have been built into the cost assumptions as appropriate. There have also been further workshops with individual schools to ensure that assumptions reflect local knowledge on complex sites and to ensure that the final cost position has been agreed with regard to the key education drivers and design challenges.

The proposals contained in the control options have been reviewed and an estimate made by the Council's Technical Advisers (AECOM) as to the likely costs to achieve these requirements, including an assessment of local market rates. The estimates include potential costs in relation to the provision of temporary accommodation and necessary decant required to undertake the project. Allowance has also been made in the estimates to meet the cost of works identified as a result of the surveys undertaken.

Land Acquisitions

No additional sites will need to be acquired to support the BSF proposals.

Capital Affordability and Cashflow

At Reconciliation Date the total capital funding (including additional abnormal funding) totals [REDACTED]. This reconciles to the agreed FAM received from PfS. The estimated capital cost is [REDACTED].

At estimated Construction Start Date (including Indexation) the total capital funding (including additional abnormal funding, VAT and Carbon Reduction Funding) totals [REDACTED]. This reconciles to the agreed FAM received from PfS. The estimated capital cost on the same basis is [REDACTED].

The Council currently estimates that the capital costs exceed the funding available by approximately [REDACTED], see table below [table removed as commercially sensitive to the Council]. The Council intends to fund this shortfall through the use of capital receipts from surplus sites. An agreement has been reached with PfS to allow the retention of 100% of capital receipts.

[Table removed as commercially sensitive to the Council]

An issue for the Council, is the fact that there are four voluntary aided schools within the Wave 6 investment programme. The Council estimates that based on the indicative design solutions generated within the control options, a VAT liability of [REDACTED] will arise. This compares with VAT funding of [REDACTED] generated by the FAM.

The timing of capital receipts is an issue for the year-to-year affordability of the programme. The Council has considered the likely timing for the realisation of any possible capital receipts and the impact, from a Treasury management perspective, of the requirement that the Council will need to temporarily fund the affordability gap before the capital receipts are realised.

Mitigation and contingency

As detailed above, the Council believes it has built up a robust affordability analysis of the Design and Build projects and fully understands the underlying costs and funding. Prudent assumptions have been reflected in the detailed costings. The key mitigating strategy against pressures on the agreed OBC affordability position will involve:

- ensuring market costs (both for construction and FM, but also funding) are monitored closely to ensure any upward pressure on costs is identified at an early stage
- remaining on programme and ensuring that the costs of any time delays are identified early and addressed
- developing an output specification which is aligned with the funding envelope.
- the Council will monitor costs during the development of the project documentation. It is the Council's intention to disclose affordability information to Bidders and be absolutely clear that no further funding is available unless funded from external resources yet to be identified

In terms of contingency, the option appraisals for the work at each school on which the allocation of funding was based were carried out on the understanding that when the detailed design work was completed, any variation in cost would be contained within the overall funding envelope. A sum was therefore set aside as a contingency to meet these costs, if necessary. This amounts to [REDACTED] of the capital expenditure sum.

If the contingency sum is not required for this purpose then the intention is to consider additional projects on a priority basis which would be funded or part funded from the remaining amount and would be delivered by the LEP. This will provide more flexibility for those schools allocated to a future wave of investment.

The Council can confirm that any unspent monies at the end of the first Wave programme will be returned to PfS.

5.2.2 Lifecycle and hard FM

It is the intention of both the Council and schools to ensure that the facilities developed under BSF are fully maintained over their design life. The Council has given considerable thought to how Best Value can be delivered through hard FM, soft FM and lifecycle works. The Council's detailed FM proposals have been discussed and agreed in principle with the Commercial Manager and a draft contract is prepared.

In summary, the following key services have been defined: -

- fixed annual hard FM services will be provided by the LEP within the FM contract
- variable reactive hard FM services will be provided by the LEP within the FM contract
- soft FM services will continue to be procured by the schools
- lifecycle services will be co-ordinated by the Council, Schools and Diocese in partnership with the LEP.

The proposals for these “key services” have been discussed with all schools at BSF Change Management Group, other sub-groups and workshops, and the schools have been asked to agree in principle to the development of these services to ensure that the required high standard of maintenance is met. The Council will develop the detail of this prior to IPD and will test the value for money throughout the competitive dialogue process.

In arriving at the above proposals, the Council’s Technical Advisers have estimated Lifecycle and hard FM costs for each phase of the conventionally-funded schools over a 25-year period. The Council, together with the schools, has undertaken an exercise to assess the current level/type of spend in relation to facilities management and lifecycle. This has then been analysed and compared to the estimates provided by the Technical Advisers. In most cases it is clear that there will be a requirement for significantly more expenditure than is currently being spent on facilities management and lifecycle maintenance. The required school contributions to hard FM and the lifecycle fund are described in the following two sections and, in accordance with OBC guidance, indicative ‘in principle’ governing body resolutions have been supplied by the relevant governing bodies setting out their commitment to make the necessary contributions.

Based on comparative models it has been agreed that these contributions are affordable and can be funded from within the existing delegated schools budgets and/or DFC, with support from the Council where required (for lifecycle costs).

Funding hard FM service costs

The schools will provide the full contribution for the annual fixed hard FM service fee for the duration of the FM contract (assumed at seven years) from their Dedicated Schools Grant (DSG).

<i>BSF No.</i>	<i>School Name</i>	<i>Total proposed FM area m2</i>	<i>Estimated "Hard FM" cost at maximum of []</i>
<i>Phase 1 (Sample)</i>			
<i>2</i>	<i>Ian Ramsey CE</i>	<i>8,885</i>	
<i>4</i>	<i>Bishopsgarth</i>	<i>7,900</i>	
<i>Phase 2</i>			
<i>5</i>	<i>Academy in North Stockton</i>	<i>8,935</i>	
<i>6</i>	<i>Academy in Thornaby</i>	<i>7,400</i>	
<i>1</i>	<i>Grangefield</i>	<i>8,885</i>	
<i>9</i>	<i>Westlands</i>	<i>4,465</i>	
<i>7</i>	<i>Abbey Hill</i>	<i>8,090</i>	
<i>Phase 3</i>			
<i>3</i>	<i>Our Lady and St Bedes RC</i>	<i>7,611</i>	
<i>8</i>	<i>Bishopton PRU</i>	<i>1,404</i>	
<i>13</i>	<i>Northfield</i>	<i>11,330</i>	
<i>14</i>	<i>St Michaels RC</i>	<i>8,885</i>	
<i>19</i>	<i>St Patricks RC</i>	<i>4,982</i>	
		88,772	

Funding Lifecycle Costs

The schools, Dioceses and the Council will seek to manage the lifecycle requirements of the buildings to ensure they are able to utilise the assets as effectively and efficiently as possible whilst maintaining a high standard of accommodation.

A lifecycle sinking fund will therefore be set up within the Council's accounts to hold the required annual contributions needed in order to meet the anticipated lifecycle costs over 25 years. This approach will level out the cost spikes in expenditure which occur at points throughout the life of the asset when significant elements of the school's plant and infrastructure require replacement.

Schools will make an annual contribution to the lifecycle fund which will be a set percentage [80%] of their lower rate Devolved Formula Capital (DFC) funding following modernisation. Additional funding will come from an element of centrally-held school budget funded from DSG in relation to Community Schools plus an equivalent agreed contribution from the Locally Co-ordinated Voluntary Aided Programme (LC VAP) in relation to the four voluntary aided schools in this wave. This will then be supplemented by a significant contribution from earmarked Council resources.

<i>BSF No.</i>	<i>School Name</i>	<i>Estimated Life-cycle cost over 25 years</i>	<i>Estimated Annualised contribution (At 2009/10 prices)</i>
<i>Phase 1 (Sample)</i>			
<i>2</i>	<i>Ian Ramsey CE</i>		
<i>4</i>	<i>Bishopsgarth</i>		
<i>Phase 2</i>			
<i>5</i>	<i>Academy in North Stockton</i>		
<i>6</i>	<i>Academy in Thornaby</i>		
<i>1</i>	<i>Grangefield</i>		
<i>9</i>	<i>Westlands</i>		
<i>7</i>	<i>Abbey Hill</i>		
<i>Phase 3</i>			
<i>3</i>	<i>Our Lady and St Bedes RC</i>		
<i>8</i>	<i>Bishopton PRU</i>		
<i>13</i>	<i>Northfield</i>		
<i>14</i>	<i>St Michaels RC</i>		
<i>19</i>	<i>St Patricks RC</i>		
	<i>Total</i>	<i>-</i>	<i>-</i>
<i>To be funded from: -</i>			
	<i>Annual school DFC contributions: 80% (Lower Rate)</i>		
	<i>Centrally retained School Budget</i>		
	<i>LC VAP</i>		
	<i>Council Earmarked BSF funding</i>		
	<i>Interest on sinking fund (Estimated at 3% p.a.)</i>		
		<i>-</i>	<i>-</i>

5.3 ICT Project

The Council has carried out a robust exercise with its ICT consultants to ensure that the ICT project element of the programme is affordable. The Council has worked with all schools to undertake a Total Cost of ICT Ownership exercise using the Becta Investment Planner tool to provide detail of schools' current and planned investment in ICT. This work has shown that schools (excluding the PRU) are currently investing between █████ and █████ per pupil on their full ICT services. The commitment to invest █████ per pupil in the full BSF ICT service is therefore affordable.

A summary of the cost model is set out in 5.3.4.

This summary clarifies the estimated breakdown of costs of each of the ICT Managed Service components.

Over the course of the programme both the Managed Service Provider and the Council will have a variable cash flow, potentially positive or negative at any one time. In view of the proposed refresh approach it has been assumed that the overall interest position will be positive, and interest has therefore been excluded from the model at this stage.

5.3.1 Introduction

The Council has worked with their ICT Advisers to develop a comprehensive budgetary model for the programme.

The model indicates that Bidders will be able to provide a solution to meet the requirements outlined in the OBC and Output Specification at a cost which is affordable at the proposed level of school contributions.

5.3.2 Programme Phasing

The programme includes 12 schools, seven mainstream secondary schools, two academies, two special schools and a pupil referral unit. Construction is scheduled to be completed on the first two sample schools on 1/3/2013. The new build element only of these two schools is scheduled to be completed on 2/3/2012 and the full managed service will commence 1/3/2012.

The contract will run for 7 years from the date of opening of the first school. (see 3.4.1 for reasoning behind this contract length)

The Full Managed Service will commence at the completion of the new build element of each school; schools will receive up to 7 years of full service, dependent upon the date of completion of the new build element of the school.

The selected Managed Service provider will be required to provide an Interim Service, available to every school, from 1/09/2011, shortly after Financial Close. (see 3.4.1 for details of interim services)

The diagram below illustrates the provisional dates for the Interim Service period and the Full Service period.

	Interim Service Start	Full Service Start	Full Service End	Mar 2011	Jun 2011	Sep 2011	Dec 2011	Mar 2012	Jun 2012	Sep 2012	Dec 2012	Mar 2013	Jun 2013	Sep 2013	Dec 2013	Mar 2014	Jun 2014	Sep 2014	Dec 2014	Mar 2015	Jun 2015	Sep 2015	Dec 2015	Mar 2016	Jun 2016	Sep 2016	Dec 2016	Mar 2017	Jun 2017	Sep 2017	Dec 2017	Mar 2018	Jun 2018	Sep 2018	Dec 2018	Mar 2019	Jun 2019	Sep 2019	Dec 2019						
Bishopsgarth	Sep-11	Mar-12	Feb-19																																										
Ian Ramsey CE	Sep-11	Mar-12	Feb-19																																										
Abbey Hill	Sep-11	Jan-13	Feb-19																																										
Grangefield	Sep-11	May-13	Feb-19																																										
Stockton Academy	Sep-11	Sep-13	Feb-19																																										
Thornaby Academy	Sep-11	Sep-13	Feb-19																																										
Northfield School	Sep-11	May-13	Feb-19																																										
Bishopton PRU	Sep-11	Jan-14	Feb-19																																										
Our Lady & St Bedes RC	Sep-11	May-14	Feb-19																																										
Westlands	Sep-11	Apr-15	Feb-19																																										
St Patrick's	Sep-11	Aug-14	Feb-19																																										
St Michael's	Sep-11	May-15	Feb-19																																										

The table below illustrates in more detail the phasing and indicates the total duration of the full managed service in each school.

School and Phase	Proposal	Sample/non-sample	Procurement route	Interim ICT Services Start	Construction Start	Full ICT Managed Service Start Date (for cost purposes)	New Build Element only Completion	Construction Completion (New build/Remodel/Refresh)	Full ICT Managed Service Completion Date (Total Duration)
Phase 1									
Ian Ramsey CE	Major remodel/refresh	Sample	Design & Build	01/09/2011	02/05/2011	01/03/2012	2/3/2012	1/03/2013	28/02/2019 (7yrs)
Bishopsgarth	Major remodel/refresh	Sample	Design & Build	01/09/2011	02/05/2011	01/03/2012	2/3/2012	1/03/2013	28/02/2019 (7yrs)
Phase 2									
Stockton Academy	New build	Non-sample	Design & Build	01/09/2011	01/05/2012	01/09/2013	30/08/2013	30/08/2013	28/02/2019 (5yrs 8months)
Thornaby Academy	New build	Non-sample	Design & Build	01/09/2011	01/05/2012	01/09/2013	30/08/2013	30/08/2013	28/02/2019 (5yrs 8months)
Grangefield	Major remodel/refresh	Non-sample	Design & Build	01/09/2011	01/05/2012	01/08/2013	01/08/2013	03/01/2014	28/02/2019 (5yrs 7months)
Abbey Hill	Minor refresh	Non-sample	Design & Build	01/09/2011	01/05/2012	01/01/2013	Minor refresh, No new build 01/01/2013	01/01/2013	28/02/2019 (6yrs 2months)
Northfield School	Major remodel/refresh	Non-sample	Design & Build	01/09/2011	01/05/2012	01/05/2013	01/05/2013	27/03/2014	28/02/2019 (5yrs 10months)
Phase 3									
Westland's	Major remodel/refresh	Non-sample	Design & Build	01/09/2011	03/01/2014	01/04/2015	30/8/2014	27/03/2015	28/02/2019 (3yrs 11months)
Our Lady & St Bedes RC	Major remodel/refreshment	Non-sample	Design & Build	01/09/2011	01/05/2013	01/05/2014	01/05/2014	27/03/2015	28/02/2019 (4yrs 10months)
Bishoppton PRU	Minor remodel/refresh	Non-sample	Design & Build	01/09/2011	01/05/2013	01/01/2014	No new build 1/01/2014	1/01/2014	28/02/2019 (5yrs 2months)
St Patrick's	Major remodel/refresh	Non-sample	Design & Build	01/09/2011	02/09/2013	01/08/2014	31/07/2014	31/07/2014	28/02/2019 (4yrs 7months)
St Michaels	Major remodel/refresh	Non-sample	Design & Build	01/09/2011	27/3/2014	01/05/2015	27/04/2015	30/11/2015	28/02/2019 (3yrs 10months)

Thornaby Community School will close on 31/08/10 with Academy in Thornaby opening 1/09/10. Norton and Blakeston will close on 31/12/2010 with the Academy in North Stockton opening 1/1/2011.

These two Academies will receive interim services from 1/09/2011.

Technicians at Thornaby Community School will TUPE to the Academy in Thornaby on closure of the school. Technicians at Norton and Blakeston will TUPE to the Academy in North Stockton on closure of the schools.

At the commencement of the Full Managed Service in each school (see phasing chart) technicians, including those in the two academies, will TUPE to the Managed Service Provider.

The financial calculations shown below relate to the period of Full Services only. Interim services will be cost neutral. Any capital investment required will be drawn down from the Full Services budget, and operational revenue from schools will be set at a level which reflects the operational costs.

5.3.3 Programme Revenue

The revenue for the ICT programme will be derived from three sources:

- The BSF capital grant of █████ per pupil for infrastructure (not indexed); this budget is excluded from the ICT calculations below
- The BSF capital grant of █████ per pupil (not indexed)

- Annual contributions from schools
 - Full Service contributions are currently budgeted at █████ per pupil per year (indexed by RPIX); this figure has been discussed with the schools and is included in the letters of commitment which have been signed by each school
 - Contributions during the period of Interim services will be dependent on the scope of the Interim services proposed by Bidders, and are yet to be finalised; schools have indicated in the letter of commitment that they support the principle of Interim Services and the principle of contributions to support the Interim Services

The Council has undertaken an Total Cost of Ownership audit of the current ICT spend at each school; based on the Council's best estimate of like-for-like comparisons the current spend is estimated at approximately █████ per pupil, with a range of █████ and █████ per pupil (excluding the PRU at █████). The proposed school contribution is therefore affordable. Schools are likely to make additional ICT related spend on top of this revenue contribution.

The table below shows the total revenue stream and expenditure by year. This assumes that:

- Capital revenues are based on the school pupil capacity figures given in section 5.3.5 below
- Operational revenues are derived from School Contributions which are budgeted on pupil capacity, less 5% to account for any under-capacity

[Table removed as commercially sensitive to the Council]

5.3.4 Programme Spend Breakdown

The budgetary financial model shows a breakdown of costs as shown below:

[Table removed as commercially sensitive]

5.3.5 Assumptions

Pupil Numbers

The programme revenues and costs are based on the schools and pupil numbers given below:

School name	Mainstream / Special	Pupils
Bishopsgarth	M	793
Ian Ramsey CE	M	1,050
Abbey Hill	S	290
Grangefield	M	1,050
Stockton Academy	M	1,090
Thornaby Academy	M	790
Northfield School	M	1,210
Bishopton PRU	S	58
Our Lady & St Bedes RC	M	785
Westlands	S	70
St Patrick's	M	500
St Michael's	M	1,050

Commercial Assumptions

[Table removed as commercially sensitive]

5.3.6 Refresh

The ICT workstream has overseen the ICT Total Cost of Ownership activity that has informed the proposed commitment of █████ per pupil per annum (indexed) of school revenue for the initial seven-year life of the ICT contract to fund ongoing maintenance of the ICT Managed Service, elements of local choice funds, refresh and training. Discussions with the ICT market have indicated that this level of investment will secure the transformation envisaged. A key requirement for the BSF ICT Solution is that it will provide a solution which is sustainable beyond the initial contract period. It is therefore essential that a proportion of the programme funding is allocated to support on-going equipment refresh after the initial equipment purchase.

The level of funding available for refresh will depend partly on the approach taken by the Managed Service Provider, and partly on the level of school contributions, but it is generally accepted across the BSF programme that the refresh fund is not expected to equate to the costs of the initial roll-out.

The budgetary cost model shows a refresh fund of approximately █████ of the value of the BSF capital funding of █████ per pupil. This level of funding will ensure that schools can replace a proportion of the user equipment during the initial contract period, so that the solution will be in good condition at the beginning of the subsequent contract period. On-going refresh after the initial contract period will be funded from on-going school contributions. Details of the approach to be taken will be agreed during the Competitive Dialogue stage.

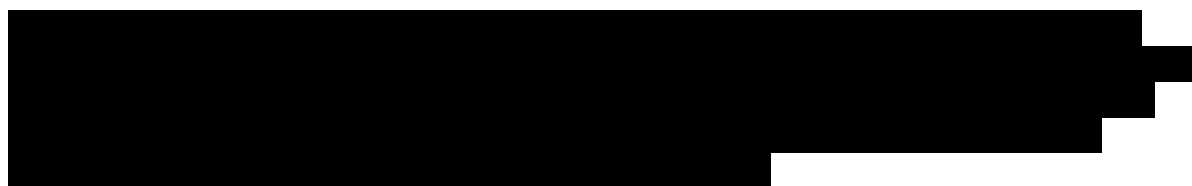
Bidders will be expected to demonstrate that they can deliver the service at a cost which will allow a proportion of the BSF capital fund and operational revenue contributions to be retained as a sinking fund for refresh in each school. In order to ensure an equitable distribution of the refresh funding, the following assumptions have been made:

- a fixed proportion of the capital budget will be allocated to refresh
- a fixed proportion of the school contributions will be allocated to refresh
- the refresh budget available to each school will be dependent on the length of Full Service for that school. The sample schools, for example, will have made contributions for a longer period than the later schools, and the refresh budget available will therefore be higher.

Bidders will be required to provide warranty for equipment in line with a refresh cycle to be agreed during Competitive Dialogue. The process for managing the refresh fund will be partially dependent on the solution proposed by the successful bidder, and will therefore be refined during the Competitive Dialogue Process. It is expected that the Managed Service Provider will be responsible for developing an appropriate supporting process.

It should be noted that refresh will be supported by the incorporation of legacy equipment; at this stage the budgetary model does not attempt to allow for legacy equipment, which will have a significant beneficial impact on the refresh position. In addition schools may choose to allocate a proportion of the Local Choice funds to equipment refresh.

5.3.7 Deferring of Capital Spend



5.3.8 Capital Spend

In line with PfS requirements, the model shows that the BSF capital funding will be spent in its entirety over the duration of the initial 7 year contract.

5.3.9 Exit strategy

A key priority from the perspective of the BSF Schools and Governors will be the flexibility to exit from the contract at the end of the initial 7-year period if they so wish.

Bidders will be required to articulate a clear Exit Strategy which will address:

- the provision of a refresh fund as described within the OBC
- a clear indication of how Schools would take ownership of any shared services such as a Data Centre at the end of the contract
- a clear indication of how the Managed Service would be priced in the case of one or more Schools withdrawing from the Service.

5.4 Local Authority Investment in the LEP

It is proposed to procure a LEP to undertake the project. The Council intends to be a [REDACTED] shareholder in the LEP – alongside BSFI [REDACTED] and the chosen private sector partner [REDACTED] - according to the provisions in the standard documentation from PfS.

The Council's shareholder equity investment is estimated to be [REDACTED] maximum. The implications of this have been considered in the Resourcing Plan. The Council understands that the actual investment will be dependent on the private sector partner's proposal.

The Council is aware that it may be required to make a contribution to the LEP working capital facility. This will depend on the Bidder's approach and will be reviewed at the IPD stage of the procurement.

SBC Member Reports – Affordability

The affordability position for the OBC, including the Council's strategy for procurement of a LEP and for FM/Lifecycle and ICT services, was agreed by Cabinet on 1st October 2009.

The Council and its financial advisors have undertaken a high level assessments of the upfront and ongoing costs of the LEP and that the cost of [REDACTED] over ten years is covered within the capital cost estimates and the revenue support approved within the section 151 officer letter. No guaranteed minimum savings or continuous improvement cost reductions have been incorporated into the capital costs developed by the Council's technical advisors.

5.5 Other Sources of Funding

None identified.

Carbon Reduction Funding

The Council anticipates that two of the school building schemes will exceed 75% of new build and will benefit from carbon reduction funding. The allocation of carbon reduction funding has been calculated using the DCSF Carbon Calculator and is based on an additional [REDACTED] per square metre.

VAT

The VAT implications of the Programme have been carefully considered in conjunction with the Council's financial and technical advisors and with support from the Council's VAT officer. The projected financial implications are as set out in section 5.2.1. The VAT position, particularly as it relates to VA schools, will be closely monitored throughout the BSF Programme.

Capital Receipts

The Council has committed to an investment above that delivered by the Funding Allocation Model (FAM). This will be secured through capital receipts arising from the disposal of surplus sites. The Council proposes to use these capital receipts to reduce the affordability gap which is partly generated by the costs associated with delivering the Council's vision for transformation exceeding the funding allocation.

The Council has taken a prudent approach to the valuation of the surplus sites. They were assessed by the Council's Valuer in July 2009. Values at the lowest end of the ranges quoted were assumed in view of the current economic climate and. no indexation of values has been assumed.

The following capital receipts and school contributions have been earmarked in respect of the BSF programme. PfS agreement has been received for application of 100% of the capital receipts to enhance the funding available.

The estimated capital receipts are:

<i>Site Name</i>	<i>Estimated Net Value of Receipt (Demolition Costs accounted for in Cost Model)</i>	<i>Projected Date of Receipt</i>
<i>The Norton</i>		
<i>Blakeston</i>		
<i>Westlands</i>		
<i>St Michaels</i>		
<i>Total</i>		

The Council will ring fence the [REDACTED] capital receipts from the disposal of the above sites to the BSF Project.

The most significant capital funding gap occurs for 2014/2015. This is because the capital receipts generated on the disposal of the Blakeston and The Norton School sites can only be generated after the construction of the new Stockton Academy. Prudential Borrowing will be considered as the means to addressing this cash flow issue.

The Council understands and accepts the financial consequence of any funding gap or issues arising from delay to the receipt of land sales income.

The Council understands and accepts the financial consequence of any funding gap. Through its S151 Officer's letter, the Council has given a commitment to underwriting the cost of the project should the expected land sale values not be realised.

5.6 Affordability – Concluding Summary

The Council believes that, after taking extensive professional advice, the project is affordable after applying financial contributions from the schools and from its own resources. Overall, the financial assumptions used have been prudent, which should provide headroom for unexpected cost increases.

The Council's S151 Officer confirms that the Council's approach to managing the affordability of the BSF project and the necessary contributions required from the Council to meet these commitments will be included in the Council's medium term financial strategy in respect of the Council's and the individual schools' budgets.

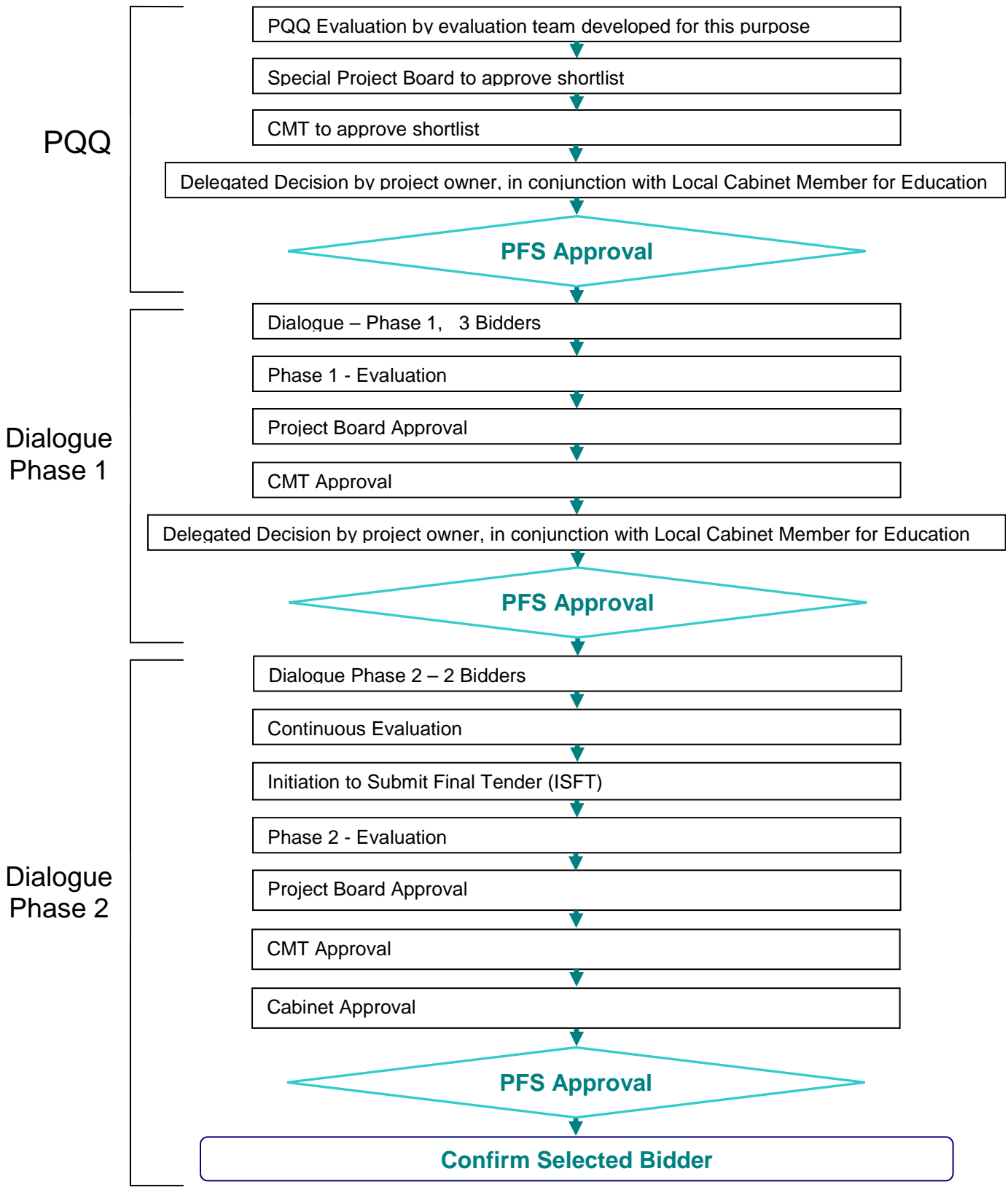
Resources/Resourcing Plan

The Council has allocated significant funds to the BSF Programme as per the and this shows a commitment of [REDACTED] pa from revenue resources. The budget includes provision for the BSF Project team and external Advisers to ensure that the project is fully resourced to the completion of procurement and during the construction programme. It also includes an assessment of the funding required to set up and resource the LEP and to fund a contribution to lifecycle costs.

The budget is robustly monitored on a monthly basis as part of the Council's budget monitoring system to ensure any early warnings for projected under spend or over spend are quickly highlighted.

Delegated authority

The table below highlights the decision-making milestones within the procurement of the LEP and the relevant approvals:



Post Financial Close

In order to ensure successful delivery of the BSF project it is also essential that the Council's role post Financial Close is fulfilled. The ongoing costs of the Council's internal team have therefore been accommodated within the BSF Resources for a period.

6 READINESS TO DELIVER

6.1 Project Management

BSF governance arrangements

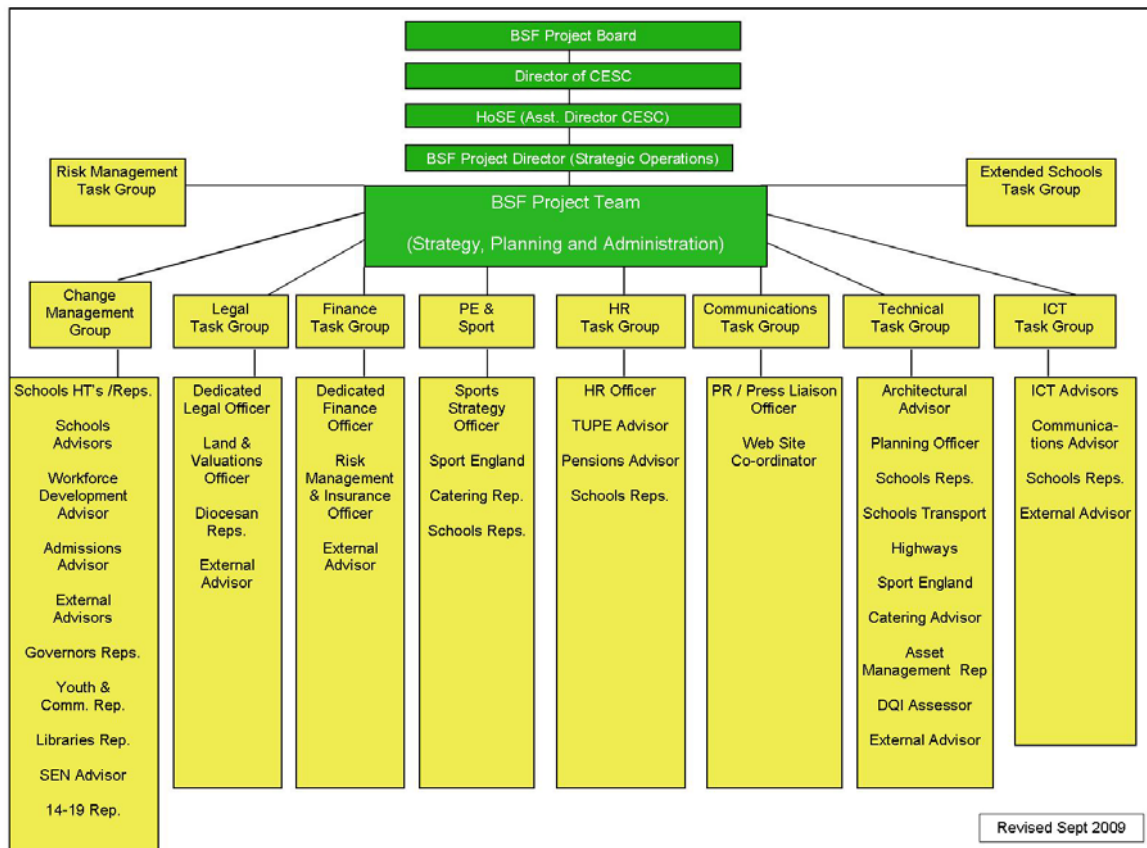
The Council recognises that effective project management is essential if the BSF programme is to be delivered to time and budget. The structure of Stockton-on-Tees's BSF programme management and governance arrangements reflects the 4ps guidance and corporate approach to project management based around the PRINCE2 methodology. We have strong capacity to deliver the programme through robust governance arrangements which include:

- Ownership of the project at the highest level by Council Cabinet, the Corporate Director for Children, Education and Social Care and the Assistant Director/Head of Children, Schools and Complex Needs. Council Cabinet oversees the programme at the highest level including approval for key decisions relating to the management of the programme, proposals for choice and diversity, the procurement route and affordability of the programme.
- A Project Board chaired by the Council's Chief Executive which includes representatives from external education partner agencies.
- A Core Project Team of 12 including the Head of BSF (project director), Project Managers, Work Stream Leads, Project Communications Officer and Project Officers who are responsible for the delivery of individual projects. The team is also supported by external project management consultants AECOM who bring a wide range of experience from an earlier BSF Authorities.
- Two external education vision consultants, including a former head of a secondary school, to support the development of the School Strategies for Change and implementation of the choice and diversity proposals.
- A wider project team within other Council sections including dedicated Technical, Financial, ICT and Legal work stream leads for the programme.
- Strong involvement from all Headteachers and Principals at the Change Management Group and Headteacher representation on the Project Board.
- Experienced, high quality external Advisers to support the delivery of the Technical, Financial, ICT and Legal work streams.
- An internal OBC development group including the BSF Project Director and Managers, the Council's Technical Lead, BSF Project Officer, the Project Director from AECOM and the programme's Client Design Adviser. This is also supported by the individual leads for Technical, Design and Cost Advisory Services

The management and organisation structure for Stockton-on-Tees's BSF programme is represented overleaf:

Management and organisation structure

Organisation of SBC BSF Support Network and Task Groups Appendix | 1



BSF Project Board

The BSF Project Board is accountable to the Council for successfully planning and procuring the BSF project. It provides strategic direction, makes key decisions and monitors risk. The Board has been fully operational since October 2007 prior to formal entry into the programme in June 2008 following the Remit for Change meeting. The Board is chaired by the Chief Executive and membership is drawn from within the Council and partner agencies including a secondary headteacher, FE representative, PCT, LSC and Pfs.

BSF Project Team

The Project Team has delegated authority from the Project Board to manage the overall project process from inception until contractual close and beyond. The Core Project Team was recruited early in 2008 following approval of our Readiness to Deliver submission. Additional posts to lead key work streams have been recruited as the programme has progressed. Stockton-on-Tees's programme is led by a number of identified work streams – project team, Education, OBC design and Technical, Financial, ICT, Legal/procurement, PE and Sport. All work streams are led by a full-time, identified internal lead either from within the core project team or a named officer within the Council. A summary of the key roles in the team is shown below in the table below:

BSF Role	Corporate Position	Responsible for
Project Owner and	Assistant	Overall accountability for the BSF programme

Head of Building Schools for the Future	Director/Head of Children, Schools and Complex Needs	Provides the interface between the Project Board and the Project Team and between Project Board and Cabinet.
BSF Project Director	Project Director	Manages the day to day and strategic development of the programme.
2 Project Managers	Project Managers	Project planning, managing work stream activity, risk management and drawing together of submissions; managing Technical Advisers and providing technical input in options appraisals and procurement.
Project Financial Accountant	Finance Manager	Based in the Project Team (under corporate line manager), leading all financial aspects of the programme and managing external Financial Advisers.
Education Vision Consultant / Change Manager	Principle Adviser	Leading the development of the Council's educational vision, supporting schools to develop their Strategies for Change and leading the Change Management programme.
Project Lawyer	Principal solicitor	Site issues, LEP, procurement and interface with external Legal Advisers. Based in corporate Legal team.
ICT Education Lead Officer	E-learning co-ordinator	Developing ICT Managed Service with schools including development of output specification and liaison with external ICT Advisers.
Policy and Industrial Relations Team Leader	Human Resources Manager	Responsible for managing TUPE implications of ICT Managed Service and academies.
School Place Planning	Planning & Policy Development Officer	Pupil place planning, statutory school organisation processes.
Administrative support	BSF Team PA	Supporting the operational day to day BSF tasks. Co-ordination of meetings, agendas, minutes, telephone and other support.
Communications	BSF Communications Officer	Delivery of BSF Consultation and Communications Strategy. Supporting Project Board and the project's document management system.
Design Champion	Chief Executive	Chief Executive with a specific interest in design issues.
Client Design Adviser	Chief Architect	Provides expertise and design advice to BSF Team and schools

The Core BSF Team is supported by suitably qualified and experienced external Advisers through to Financial close. They are:

- Technical – AECOM (previously Faber Maunsell), EWA Architects, Rex Proctor Partners
- Financial – Grant Thornton
- Legal – Dickinson Dees.
- ICT – AECOM/ Novatia
- Insurance Advisers – Will be appointed during September/October 2009.

To ensure that Stockton-on-Tees's BSF programme delivers its intended outcomes as efficiently as possible an evaluation and lessons learned protocol has been established. Information will be gathered from three main sources:

- Previous similar projects (PFI and large capital projects);
- Lessons learned whilst progressing through the BSF programme and between stages; and
- From external sources and good practice methodologies.

The information will be collected and disseminated through:

- The Gateway Review process – a lessons log and lessons learned report will be compiled at the end of each stage;
- Stockton-on-Tees's adherence to the Prince 2 programme management methodology and its requirements to capture and articulate learning points;
- Ongoing benchmarking tools, such as the KPIs and DQI processes;
- PfS and 4Ps forums;
- Stage 0s and FBCs at stages 2 and 3.

These processes have been embedded into the BSF team's management plan and will be reviewed and updated quarterly. In association with this review, lessons learned from that period will be updated on the lessons log and disseminated accordingly. We have continued to receive support from 4Ps throughout the BSF process including project team training and Gateway reviews. Looking ahead it is expected that we will agree to operate in collaboration with our LEP and that there will be some integration of the LEP and the established Project Team. We expect to treat the LEP very much in terms of partnership in its fullest sense. A strategic Cabinet paper defining the scope of the LEP was agreed on 3 September 2009 and Cabinet's decision will be implemented during the procurement stage.

6.2 Procurement Process

Procurement scope

As set out in the Sfc2 submission, we will be procuring a LEP to deliver our BSF programme and to procure an integrated Managed Service to deliver ICT and hard FM to schools. This approach was been agreed by Cabinet on 3 September 2009. The Council has undertaken a scoping options appraisal to identify any wider services to be included in the LEP. This included a number of cross department workshops with senior officers and a series of seminars with Councillors to identify the advantages and disadvantages of including particular services other than those directly relating to the BSF programme. This included discussion on the services included in LEPs already in existence in earlier BSF authorities. There have also been detailed LEP discussions with Partnerships for Schools (Pfs). At its meeting on 3 September 2009, Cabinet agreed that Stockton-on-Tees's LEP will be given exclusivity for the provision of:

- BSF funded capital works to schools within the BSF programme procured under D&B contracts.
- Maintenance and facilities management (Hard FM only) services for schools
- A Managed Service to deliver Information and Communication Technology (ICT) to the schools within the BSF programme (including those which are not currently subject to BSF funded capital works).

In addition, the LEP might be invited to carry out the following services subject to a specific value for money assessment (but will not be granted exclusivity):

- Lifecycle works
- Capital works funded by the Primary Capital Programme
- Non BSF-funded works on BSF school sites
- The provision of ICT services to primary schools

Procurement timeline

The submission deadline for the Outline Business Case of 5 October 2009 drives the scheduling of the procurement process. Planning for procurement is based on an assumption that we will receive approval for our OBC in mid-November 2009. The target date to publish the OJEU notice for the sample schemes is Monday 16 November 2009 and we continue to plan for procurement on this basis.

The procurement documentation, as required by PfS in its OBC Guidance Supplementary Clarification 3 together with the relevant derogations tables, have all been submitted with this OBC.

The project plan and resources are based on this programme; taking into account the scheduling of significant school holidays which may impact on engagement with schools. The timetable for procurement is set out below. The timeline flows from the target publication date for the OJEU notice of 16 November 2009. Based on the target date for the OJEU, we anticipate that we will reach financial close in late April 2011. Construction on the sample schemes is scheduled to commence early in the following month.

PHASE	TASK	DATE
Development Phase	Remit for Change	June 2008
	Strategy for Change Part 1	July 2008
	Strategy for Change Part 2	April 2009
	Soft Market Testing Event	25 June 2009
	Outline Business Case	5 October 2009
	Procurement documentation submission	5 October 2009
	Procurement Phase	
Pre-qualification period	Issue of Official Journal of European Union (OJEU) Notice to prospective Bidders	16 November 2009
	PQQ responses received	27 December 2009
	PfS agree PQQ shortlist	22 January 2010
Dialogue Phase 1	Issue Invitation to Participate in Dialogue (IPD1) to three Bidders	22 January 2010
	IPD submissions	23 April 2010
	Evaluation	26 April – 4 th June 2010
	Recommend short list of two Bidders	11 June 2010
Dialogue Phase 2	Close of dialogue	6 September 2010
Final Tender Period	Issue Invitation to Submit Final Bids (ITSFB) to remaining two Bidders	17 September 2010

	Receipt of final bids	15 October 2010
	Evaluation	18 October- 26 th November 2010
	Confirm Preferred Bidder	10 December 2010
Close period	Financial close (signing of documents)	22 April 2011
Construction Phase	Construction start for sample schemes	– Ian Ramsey and Bishopsgarth May 2011
	Financial close for Phase 2 schemes	Thornaby Academy, Stockton Academy, Grangefield, Northfield and Abbey Hill - March 2012
	Construction start for Phase 2 schemes	May 2012
	Construction start for Phase 3 scheme	OLSB, Bishopton centre, St Michael's, St Patrick's, Westland's - May 2013
	Completion of sample schemes	Late March 2013
	Completion of all Phase 2 schemes	Early January 2014, (the two Academies being completed by late by August 2013)
	Completion of all Phase 3 scheme	Late November 2015

Soft market testing

The BSF Team has begun to engage with the market to raise awareness of Stockton-on-Tees's programme and the procurement timeline. A Soft Market Testing event took place on Thursday 25th June 2009. The event provided potential Bidders (including private sector construction, ICT companies and architectural practices) with an opportunity to find out more about Stockton-on-Tees and our BSF programme. The event set out a high-level overview of the programme and potential schemes.

The event was advertised through a Prior Information Notice in the European Journal. We had a total of 90 attendees on the day and received excellent feedback. A lot of interest was expressed in Stockton-on-Tees's BSF programme resulting in requests for one to one follow up sessions. The Bidders were advised at the event that the OJEU was to be submitted on 16th November 2009. A number of potential Bidders have requested the opportunity to visit sample schools and meet the design team, ICT Advisers and the schools' internal BSF teams. The Council's BSF Team is looking to schedule these opportunities with Ian Ramsey and Bishopsgarth in October 2009 to coincide with the publication of the OJEU notice.

Management of the procurement

The Council already has considerable experience in successfully procuring and delivering major education capital schemes in recent years including:

- A [£10m] school PFI development of a secondary school, primary school and community library which was delivered on time and to budget;
- Six new-build primary schools funded through basic need, developer contributions and successful Targeted Capital bids; and

- In addition, the Council has experience in procuring major contracts including highway construction and maintenance contracts and numerous housing schemes. We are drawing on this experience and the guidance from our colleagues in the Corporate Procurement Team, PFS and our external Legal Advisers to structure and manage the evaluation and selection for the BSF programme.

The BSF Project Team has delegated authority to manage the procurement process and specifically:

- Drafting procurement documents using PFS templates
- Evaluating bids from shortlisted Bidders
- Recommending a preferred bidder to Project Board
- Continuing negotiations to Financial Close.

The BSF Core Project Team and Advisers (AECOM) will evaluate the initial submissions making recommendations to the Project Board for selection of the prequalified procurement long-list (if applicable). The revised procurement process includes a more comprehensive pre-qualification process with the aim of de-selecting to a 'long-list' of three Bidders prior to dialogue. For the Pre-Qualification Questionnaire we have agreed evaluation teams, including the BSF team leads and External Advisers, who will agree the 3 bidders who will be invited to commence dialogue. During both phase 1 and phase 2 of the dialogue process, the Council will ensure representative cross-sections of Council stakeholders are involved, with these evaluation teams being enlarged to include representation from the Sample Schools and Academies and a pupil design panel. The bids will be evaluated by incorporating PFS weighting criteria.

The structure and membership of the evaluation teams and the programme of the Pre-Qualification Questionnaire (PQQ) and dialogue phases has been drawn together and agreed by the Project Board. The evaluation process will be supported by E-box contract evaluation software to ensure consistency.

6.3 Consultation and Statutory Approvals

Communications and Consultation Strategy

Stockton-on-Tees Borough Council has a robust BSF Communications and Consultation Strategy embedded within the delivery of the BSF programme. This strategy has been developed and implemented as the success of Stockton-on-Tees's BSF programme is dependent on the support and involvement of a wide range of stakeholders and partners in order to ensure the transformed schools reflect the vision for Future Learning across Stockton-on-Tees.

A dedicated, full-time Communications Officer is responsible for the development and delivery of the Communications and Consultation Strategy. The BSF Communications Officer is based within the BSF Project team and works alongside and is supported by the Council's Corporate Communications team.

The BSF Communications and Consultation Strategy identifies the wide range of internal and external stakeholders and partners who must be communicated and consulted with. It also indicates the communication techniques which are implemented to reach these audiences. The stakeholders and partners include, but are not exhaustive of the following:

- Local Dioceses
- PFS
- DCSF

- 4Ps
- LSC
- Prospective Bidders
- Academy sponsors
- Trade Unions
- Community Leaders
- MPs
- Media
- Local Community
- Council Members
- Stockton-on-Tees Council Services and Staff
- The internal BSF delivery team
- School teachers, staff and governors (see section 7.1.3)
- Further and higher education staff (see section 7.1.3)
- Parents (primary and secondary)
- Young people (primary, secondary, further and higher education)
- Neighbouring authorities

Communication and consultation with stakeholders and partners is achieved through the delivery of a communications plan. The communications plan is developed annually and is revised regularly. It supports the Communications and Consultation Strategy by outlining what needs to be communicated to which audience on a month by month basis.

Examples of communication and consultation methods undertaken to date include but are not exhaustive of the following:

- Briefings for other Council services
- Monthly Project Board meetings. The Project Board is chaired by the Chief Executive and consists of members of the Council's corporate management team, a headteacher and a representative from both the Learning and Skills Council and the Primary Care Trust
- Members' seminars providing regular BSF updates to ensure Councillors are fully briefed and develop an understanding of key issues such as the LEP and the managed ICT and FM services
- The PE and Sport stakeholder group has Sport England representation and a PE and Sport Communications Strategy has been developed to support the work of the PE and Sport Stakeholder group and work in conjunction with the overall BSF Communications Strategy
- A Change Management Group meeting of all secondary headteachers, college principals and Council officers
- Drop-in sessions for parents, pupils, staff and governors
- BSF team attendance at governing body meetings
- Regular articles in Stockton News the Stockton-on-Tees Council community newsletter
- The regular distribution of press releases
- Articles published in "Keeping you in Touch" the Stockton-on-Tees Council employee newsletter
- Articles published in "Gleanings," Stockton-on-Tees's newsletter for school governors
- Electronic BSF internal newsletter for members of the BSF delivery team
- Dedicated BSF pages on the Stockton-on-Tees Council website
- The use of the online document management system, E-box which facilitates confidential communication between stakeholders throughout the programme.

Engagement with young people throughout the BSF programme development and delivery is paramount in order to ensure that the BSF schools reflect their needs and aspirations. A range of activities are under way to ensure their views are considered.

Students from the two sample schools have taken part in DQI workshops and attended visits to BSF schools. The students completed evaluation sheets during the visits to help them make informed decisions about what they would like to see in their future school. The young people relayed their perspectives to potential Bidders at the BSF Bidders' Day in June 2009.

A BSF student forum consisting of representatives from all of the borough's secondary schools will be established in September 2009. This will ensure that students are fully informed about and involved in shaping BSF. This group will be responsible for disseminating information to their peers.

Ian Ramsey Church of England School has secured a grant from Creative Partnerships. This grant will be used to enable students to work with Northern Architecture on a BSF-related project. The project will last 6-12 months and will see the young people develop an understanding of the entire design and build process. It is hoped that this will enable the creation of a Pupil Design Panel consisting of highly informed student clients to assist with the evaluation process. The Council is currently investigating the possibility of extending this opportunity to Bishopsgarth School to ensure that all members of the Pupil Design Panel are equally informed.

Effective two-way communication and consultation feedback mechanisms are vital to ensure all stakeholders remain engaged throughout the BSF programme and are fully informed about how their involvement helps to shape the programme delivery. The BSF email address is regularly publicised and any comments receive a prompt response. A section of the BSF website is also titled "You said. We did" and is used to publicise how consultation with stakeholders has informed the BSF programme.

Stockton-on-Tees Borough Council recognises that communication and consultation needs will change throughout the duration of the BSF programme. Consequently, the Communications and Consultation Strategy is a living document. The use of various communication and consultation techniques will alter when necessary. The need for this will be identified through regular evaluation of the Communications and Consultation Strategy. This evaluation involves various means such as:

- Monitoring and recording the amount and standard of media coverage
- Attendance at all BSF consultation events from Members' seminars to public drop-in sessions
- Comments received during consultation
- Evaluation sheets completed by delegates following events

Planning approval to appropriate level/Section 106/ Interface with Highways

Planning Briefs have been developed for the sample schools; Ian Ramsey C of E and Bishopsgarth Schools, and have been approved by Stockton Borough Council's Planning Committee. The outlined approved developments are in line with the current control option studies.

Planning briefs are yet to be developed for the Academy sites at Stockton and Thornaby.

Letters of comfort have been produced by the Planning authority in respect of all other school developments.

An ongoing dialogue has been established with the Local Planning Officers who are fully conversant with the proposals being considered within Stockton's BSF programme.

Section 278 agreements will be required from the LEP to authority in respect of where road improvement and alteration works will be required. Initially this will only affect Ian Ramsey C of E School in respect of an additional access position to facilitate a bus turning and dropping off position.

Additional Section 278 agreements will be required for the Stockton and Thornaby academies for junction and entrance improvement works.

School closure notices/school reorganisation

A Statutory Notice has been published and approved for the closure of Billingham Campus School (a school in special measures) and the enlargement of Northfield School to encompass the site and buildings of Billingham Campus School with effect from 1st September 2009. Under BSF the current Northfield School site will be enlarged from 1130 places to 1210 places (including the special unit) to allow all Northfield students to be educated on one site post-BSF.

Stockton-on-Tees Borough has three National Challenge Schools with greater than 25% surplus places. All three schools will be proposed for closure within the BSF Programme. To support improvement in standards, achievement, attendance and inclusion, two Academies are proposed to replace these three schools. Statutory consultation relating to the proposed closure of Thornaby Community School, Blakeston and the Norton School and the creation of two Academies will begin in September 2009. Subject to consultation and Cabinet agreement, statutory notices will be published in November 2009 with a view to closure in August 2010 (Thornaby Community School) and January 2011 (Blakeston and The Norton). The plan to enlarge Bishopsgarth School from 642 to 793 places (including the special unit) does not require statutory proposals.

The governing bodies of the three Roman Catholic secondary schools issued in June 2009 a formal proposal to form a hard governance federation to be implemented from January 2010. Consultation on that proposal will end on 8 September. The three governing bodies will meet on 10 September and intend to announce their final decision on 14 September.

Review of title

Title investigations have been undertaken for the sample schools and other wave 6 school sites. The following searches and enquiries for each site have been made:

- Drainage and water search
- Mining search
- Environmental search
- Chancel check
- Search of the index map
- British Telecom search
- Gas Utility search
- Electricity company search
- Local Land Charges search

Further the Council are liaising closely with the representatives and legal representatives of the Trustees of Ian Ramsey School and the Diocesan Authorities regarding title issues.

These title investigations have not disclosed any issues that would negatively impact on the delivery of BSF.

OJEU

The OJEU notice will be issued electronically by the Council on 16th November 2009. The OJEU notice includes the following:-

- exclusivity to the LEP to provide building works, maintenance and facilities management services, and a managed ICT service for schools funded by the BSF programme;
- the potential for the LEP to provide additional services in respect of building works at schools funded by the Primary Capital Programme or other funding programmes, and building maintenance, facilities management, and a managed ICT service for schools (including primary schools) and other facilities outside the BSF programme.

6.4 Sponsor and School Commitment

The BSF programme is embedded at the highest level of the Council as evidenced with member and chief executive representation at the Project Board and through the BSF Core Group. The strong relationship between schools and the Council has been integral in shaping the programme and the individual school schemes. Schools have been involved at all levels of the process including through representation on the Project Board and the ICT Working Group and through consideration of proposals at a formative stage by the Change Management Group.

The Council has prioritised the active engagement of stakeholders throughout the process. Our Communication and Consultation Strategy (included in our Sfc2 submission) sets out how the Council has consulted key stakeholders through the governance structures of the project and other approaches. Examples of engagement undertaken include:

- **School visits** – students, headteacher, Governing bodies, CAGE, BSF team visited recent new build schools in Sunderland and Redcar and Cleveland BC.
- **Student Creative Partnership involvement** – sample school students have been involved with Creative Partnerships to gain an understanding of the BSF procurement process. The process also covers sessions on design development which will enable pupils to be informed clients with the outcome to create a pupil design panel during competitive dialogue.
- **School assemblies** - a number of school assemblies have touched on the possibilities of schools for the future.
- **BSF information events** - the BSF team have held informal drop-in sessions at the sample schools where local residents and parents were given the opportunity to view the initial plans for the schools before planning briefs were submitted.
- **Web site/electronic communication** - we have set up dedicated web pages for Stockton-on-Tees's BSF programme on the Council's site www.bsf@stockton.gov.uk
- **BSF newsletter** – we have established a dedicated newsletter about the programme which is distributed widely to all stakeholders.

School commitment to the project is evidenced through letters of commitment to the ICT Managed Service (all schools), FM services and schools' contributions from Dedicated Schools Grant to the Lifecycle Fund.

The proposed academy sponsors have completed the Statement of Intent and Expression of Interest stages.

6.5 Risk Management

As set out in SfC2, risk management is integral to the project. The risk management process for Stockton-on-Tees's BSF programme reflects the Council's corporate approach. It is the Council's policy to proactively identify, understand and manage the risks inherent in our services and associated with our plans and strategies, so as to encourage responsible, informed risk taking. Risk identification is a specific responsibility for the Project Board and Project Team members as set out in the terms of reference although anyone involved in the project can identify risks. The project maintains a comprehensive risk register based on a four stage risk management process to identify, evaluate the initial risk, agree actions to mitigate the risk, monitor and review the residual risks.

Risks have been identified on an ongoing basis throughout the project. Risk workshops have been held at the outset of each project stage with the wider project team, external Advisers and the Change Management Group. Work stream leads are nominated risk owners with the Project Manager retaining the overall responsibility. Risks are reviewed on an on-going basis with any changes in status reported to the Project Manager and the BSF Project Director at regular intervals including monthly team meetings. Where necessary, project management escalates the high level risks to the Project Board, sets out the impact of these risks and the proposed actions for consideration.

The programme risk log is a standing item on the Project Board agenda with updates on the high-level risks based on impact and probability RAG (red, amber and green) report being considered in detail. The programme risk register covers all risks to the programme including procurement, construction and contractual risks. The project's risk register includes procurement risk analysis, education transformation, demand and affordability risks. It is planned in the very near future to maintain separate site risk registers for each of the Wave 6 schemes which will draw together the findings from the site investigations, surveys and searches in the programme. The site risk registers will draw together risks related to each school project.

Gateway Review 0 and 1

Stockton-on-Tees's BSF team engaged in the non-mandatory Gateway 0 review in March 2008. The review found that Stockton-on-Tees's programme had been well planned and resourced to date with strong project management and a very capable and highly motivated team. The report indicated a need going forward for an additional project manager and communications officer (both posts have now been filled). The report indicates that timescales have been adhered to, risks are carefully reviewed and managed and all of this has resulted in a sense of confidence in the management of the programme. This is within the context of a Council which has a 4-star rating and CYP services judged in the JAR to be good with outstanding capacity to improve. In line with the requirements for the delivery of BSF projects, the programme are engaged in the Gateway 1 review from 23rd to 25th September 2009. This is to provide an independent assessment of our OBC.

6.6 KPIs

Meetings between sample schools' representatives and Legal Task Group including our Legal Adviser have taken place. It has been decided that the Council will adopt the standard KPIs indicated in Schedule 12. The Council will expand that schedule to include matters that are considered by them to be of vital importance to the borough. Some examples are KPIs related to the use of local supply chain companies and the local labour market; providing sustainable design and building solutions that add value to the learning experience; making provision to maximise community use of the facilities; and ensuring opportunities for integration of public, private and schools' PE & Sport

facilities are created. A system of checking compliance with KPIs and sanctions for non-compliance is being developed for discussion during dialogue.

7 LEADING AND MANAGING CHANGE

7.1 Overview

The theme of the BSF programme is 'Campus Stockton' – a vision of transformed learning achieved by the development of system leadership across the family of schools and colleges in the borough. The successful implementation of 'Campus Stockton' requires a process of sustained change in working practices, structures and behaviours over a significant period of time. To achieve our shared vision for future learning across the borough we will need to develop further our systems to support working practices across the organisational boundaries of schools, colleges and the Council. The process and structures we have already adopted will allow us to move forward together through inevitable uncertainties as we achieve our ambitions for the young people of Campus Stockton.

We believe that developing system leadership is a key to transformation in Campus Stockton. The best way of describing this would be that all leaders share the mission and responsibility for improving all schools in Stockton-on-Tees to the level of the best. Research shows that this will be achieved by school leaders working collaboratively to find ways of narrowing achievement gaps, by being fundamentally committed to improving teaching and learning across all schools, by developing their schools as learning communities and by striving for equity across the system. Put simply, every student in Campus Stockton is everyone's responsibility.

This vision for transforming learning across Campus Stockton has been developed with all headteachers (Wave 6 and the second wave), principals and senior leaders, through their regular meetings and facilitated training sessions. Secondary headteachers, college principals and Council officers were first engaged in this process of change through collective visioning meetings early in 2007 and focus has been sustained through weekly sessions of the Change Management Group. Research demonstrates the importance of developing such a group that has enough power to influence and lead the change effort. It is important to continue to build good relationships in this group and to foster shared values, based on the shared responsibility for improving the outcomes of young people. This is the basis for our system leadership.

We are committed to moving from our present position to our desired outcomes and this means that our change management programme has been planned to make sure that BSF investment secures improvement at a faster rate than would otherwise have been the case whilst taking due consideration of the challenges involved. The Council recognises that change on such a scale over a considerable period of time could prove disruptive to the learning process. We understand that it is crucial to support our schools to maintain standards during the BSF process. We appreciate that BSF will make considerable demands on colleagues in schools, their communities, the Council and other stakeholders. We will work closely with our schools to identify the risks involved as they move through the process and through careful assessment will support them to develop strategies to mitigate the effect on the learners. Consideration has already been given to this in terms of the option appraisal criteria in SfC 2 and the work being undertaken by Technical, and Education Advisers in phasing the programme. The proactive engagement of all key stakeholders across the Council, schools, colleges and academies will ensure that all risks are 'owned' and that all key stakeholders understand their role in mitigation of them.

By developing their individual strategies for change, the schools have been challenged by the aims of the BSF programme to have a compelling vision so that they are clear about the desired outcomes

for the future learning they are developing. This has led schools to review their current organisation of learning including curriculum design and pedagogy. There is now greater clarity across the Wave 6 schools of the structural changes and the management of change that will be needed through the BSF programme.

Threaded through Individual School Strategies for Change are the 12 Big Ideas for the innovative use of ICT drawn from the overall Council ICT strategy which recognises that e-learning is constantly evolving and that the challenge is to utilise what is current, and anticipate and explore the potential of the future to create learning through innovative use of e-learning. Ensuring that development and support go hand in hand is key to further developing the expertise of staff in schools, colleges and the Council. Developing an appropriate menu of high quality CPD is a fundamental part of our change management plan.

Risk Management

Educational risks are clearly understood and articulated in the BSF risk register with mitigation steps identified. The key risks associated with education transformation include:

- **No real education transformation is achieved by the BSF programme:** We are totally committed to securing the desired outcomes expressed in both the Council's Strategy for Change and the Individual School Strategies for Change. The programme will be proactively led and managed through the complexities of creating 21st century learning environments.
- **Capacity constraints within the council and schools leads to a drop in standards due to distractions of BSF:** The Council recognises that it is crucial to maintain standards during the inevitable disruption of the BSF process and to mitigate this risk, realistic demands are being placed on schools due to BSF. Capacity and staff motivation are reviewed with schools on a regular basis so that any problems can be addressed early. Schools are advised to identify change champions who are enthusiastic staff able to rise to the challenges of promoting educational transformation through BSF. This role is seen as one which gives aspiring school leaders the opportunity to lead and influence complex change in their own schools as well as working collaboratively. As such it is a part of our succession planning strategy. A headteacher is being seconded to the Council for a year to support the development of system leadership and to effectively bridge organisational boundaries so that any problems leading the management of change are quickly identified and addressed.
- **BSF remodelling disrupts learning:** Consideration has already been given to this risk in terms of the option appraisal criteria in SfC 2 and the work being undertaken by Technical and Education Advisers in phasing the programme. We will encourage the schools and those who work with us to build and remodel schools to have shared ownership of the issues involved and to take a proactive and creative approach to finding solutions. For instance, a properly constructed 'viewing classroom' can give safe access to the processes involved and so contribute to work related learning, and assemblies/lectures by those involved in construction can inform the whole school community of the challenges and progress during the building phase, as can appropriate links to the governing bodies.
- **The improvement agenda slows in schools:** To sustain school improvement and secure the desired transformational outcomes each school will continue to be pro-actively supported by the Education Improvement Service and external consultants through the further development of design briefs and curriculum plans and the delivery of the school's change programmes. As the process intensifies and the risk to the maintenance and improvement of standards increases, Advisers will, in collaboration with School Improvement Partners, provide an additional focus upon standards and transition issues. There is a recognised need to:

- ensure that each sample school has appropriate levels of support post OBC from an Educational Improvement Officer to co-ordinate and broker appropriate interventions and to provide challenge to sustain improvement;
 - ensure that each sample school is well supported and challenged by a well informed SIP who can sustain discussions on the progress towards transformed learning and curriculum development;
 - provide enhanced dedicated ICT leadership and support capacity including timely CPD for staff;
 - provide continued improvement support for Wave 6 non sample schools;
 - ensure that specialist Inclusion/SEN capacity is available to support special schools and those mainstream schools where inclusion and SEN are identified as key issues.
- **Being unable to obtain regulatory approval from Pfs and DCSF with regards to education vision/strategy and the proposed designs (i.e. not being transformational enough) would be a risk:** Regular formal engagements have already been established with Pfs. From their feedback and challenge, advisers and external consultants continue to support and challenge schools through the use of constructive feedback to secure a compelling vision for change and improvement in their school-based strategies with steps on how the vision will be achieved.
 - **School staff react negatively to proposed changes leading to failure to manage the changes effectively:** A BSF lead has been identified for each school. This is someone other than the headteacher whose developing role is to ensure that staff in their school at all levels are engaged with the process and that their views are incorporated into school developments. Reflecting the successful training sessions on transforming leadership and transforming learning already carried out with all school and college leaders in April 09 and June 09, similar sessions will be held with BSF school leads in the autumn term to sustain the focus on organisational and cultural change at school level.
 - **The benefits of the new technologies are not maximised:** The benefits that new technologies bring to learning will be shared by educational ICT Advisers promoting their importance. ISSfCs have been scrutinised to ensure that the use of ICT is threaded through. Pre-roll out trials will be undertaken to ensure that staff are trained and well equipped to work with the new technology.
 - **Vulnerable schools see a decline in standards during a transition phase:** Focused support for specific schools will be given by the Education Improvement Service to address specific needs and transitions related to school closure. Additional support will be provided to ensure that the management of closures and building programmes does not jeopardise further standards at the schools concerned. Schools affected are Billingham Campus/Northfield; Blakeston and The Norton (Academy in North Stockton) and Thornaby Community School (Academy in Thornaby).

Individual School Strategies for Change

Before submission of Sfc2, small task groups from the Change Management Group were established to review the extent to which individual school strategies for change covered issues such as inclusion, personalised learning, 14-9 curriculum developments and ICT and how well they linked to Council strategy. These task groups involved school leaders (those actively involved in developing strategies for change and those yet to develop them), college leaders and Council officers. Personalisation was assessed as a strong feature in all individual strategies for change and despite diversity of expression, a vision for Campus Stockton outlined in the Council strategy was recognisable in each one. The outcome from the task group on inclusion judged that although identifiable in all individual school strategies, at times the approach to inclusion and learners with special needs was implicit rather than explicit. The recommendation made for all schools was that

the focus on 'No child left behind', a key part of the shared vision, should be identifiable in individual school strategies. Individual feedback was given to schools about the ICT issues.

Following feedback from PfS, educational Advisers and external consultants have worked closely with schools to develop further their ISSfCs to ensure that their transformational objectives are achieved.

The next step for the Change Management Group is to develop quality assurance processes and agree a common framework to evaluate the quality of change management at school level so that:

- high standards and achievement through a period of transition are maintained;
- personalised learning is developed;
- schools contribute to 14-19 provision;
- there is a focus on inclusion and SEN;
- schools engage with the ICT developments;
- the five ECM outcomes for learners of being safe; being healthy; enjoying and achieving; making a positive contribution; and moving into economic well-being are all delivered.

7.2 Change Management

Creating a Successful Change Management Plan

We believe that a successful change management process for the Council, schools, colleges and academies is grounded in the quality of the shared professional relationships and effective partnership working we have jointly developed over time.

We have developed our change management strategy by:

- acknowledging our role as “guardians of the future” to generate compelling reasons in the present for embarking on a period of sustained change that will impact on future learning for the benefit of learners in Stockton-on-Tees;
- identifying and managing the contribution of all stakeholders, incorporating their views and securing their participation through consultation;
- ensuring that the change rationale and process is understood by all partners, shared and well communicated;
- developing a simple project plan from the present to the future that breaks the process down into manageable steps. This comprises an infrastructure of meetings, workshops, facilitated training sessions and conferences to address the change agenda. It articulates key dates, milestones, activities, which schools are involved, outcomes and deadlines.
- Providing individualised support to schools based on need.

Structural and organisational change

Proposals for school organisation take full account of views expressed in consultation and at the remit meeting. These organisational changes (all subject to statutory consultation and decision-making procedures), will raise standards, increase diversity and address underperformance. As the Stockton-on-Tees BSF organisational changes adhere to the principle of access, diversity and choice, students will have a choice of learning institution from a diverse range of schools, each with a distinctive character based on ethos, faith, specialism and curriculum offer.

Organisational culture and system leadership

Our change management programme addresses the behavioural and cultural change needed to transform leadership, specifically the development of system leadership across Campus Stockton.

The Principal Adviser (Intervention) took up position as the BSF Change Manager at the start of August 2009. This followed a three-month professional sabbatical research with Durham University (January to March 2009) looking at the challenge for leadership at a time of complex system change. The findings are grounded in data drawn from fieldwork in Stockton-on-Tees including qualitative (appreciative inquiry, individual interviews, meeting attendance) and quantitative (survey) data. The research identifies both the strengths of current collaborative leadership and the challenges that still have to be addressed to secure adaptive change across Campus Stockton.

This research has been shared widely among heads and principals and key messages have been incorporated in leadership development sessions facilitated by the BSF Change Manager from April to June. We have now embarked on developing system leadership across Campus Stockton, moving away from traditional models focussed on the priorities of single institutions to co-leadership and interdependent accountability to deliver the priorities of Campus Stockton.

At the June session of the Change Management Group, it was agreed that a small task group would flesh out a model for educational improvement across Campus Stockton with a focus on securing the best outcomes for students. Following feedback from this working party, school and college leaders agreed to look at models of Education Improvement Partnerships through the autumn term 2009 to make governance arrangements and accountabilities for system leadership more explicit. This work will be carried out by a secondary headteacher seconded to the Council for a year and working in close partnership with all secondary schools.

There is now an acknowledged collaborative driver based on shared accountability which extends to developing inclusive practice across all schools with every child recognised as everyone's responsibility so that 'No child is left behind'.

Building enduring system leadership is crucial to securing personalised learning in all schools regardless of BSF wave and in securing sustainable transformation of both curriculum and learning. The 'Deeps' model of leadership, as developed by Hargreaves in partnership with the Specialist Schools and Academies Trust (SSAT), is a way of expressing aspects of system leadership across Campus Stockton.

Monitoring and evaluating change

In accordance with the strap line of our Children and Young People's Plan, 'No Child Left Behind,' we will measure the success of our approach by continuous reference to our three fundamental principles:

- putting the learner first – personalised learning that meets individual needs in a diverse range of schools;
- schools at the heart of the community – local bases for integrated service provision supporting lifelong learning;
- every school will be a good school – unique in ethos, culture and specialism, consistent in delivering high-quality outcomes for all.

The commitment to securing the aims of BSF is demonstrated by the accountability structures that have been established across the council and schools.

The Project Board

Project Board (chaired by the Chief Executive) consists of the Corporate Management Team supplemented by the Cabinet Member for Children and Young People, a representative of the Secondary Heads and Principals' Group, the regional Partnership Director of the LSC, PFS Project Director, The Assistant Director Children Education and Social Care (CESC) (Head of Children, Schools and Complex Needs – Lead on BSF), the BSF Project Director and Council Head of Service leading on the Primary Capital Programme. Regular meetings take place with the four dioceses. The local LSC is represented on the BSF Project Board, and the PCT is represented by two senior officers employed jointly by the PCT and Council.

The BSF Project Board provides the overarching governance for the BSF project and sets the strategic direction. The Board carries out the strategic monitoring and evaluation role for the BSF goals and agreed KPIs. Through regular reports on progress to the Board, the Project team is held accountable for the progress with the BSF timeline of actions. The Board is also responsible for providing guidance and approval for project direction and monitoring any changes that might affect project outcomes.

Monitoring and evaluation of Key Performance Indicators will be systematic and externally monitored and verified. At corporate level:

- the Sustainable Community Strategy, Council Plan and CYPP will define key milestones and monitoring systems within our established practice;
- These are scrutinised by the Children and Young People Scrutiny Committee, Corporate Management Team and Children's Trust Board;
- Where key milestones are present in Business Unit Plans the individual managers will be accountable to the Head of Service for their achievement through our regular monitoring system and formal annual review arrangements of CYPP and strategic planning;
- Quantitative performance indicators on achievement, standards, attendance and behaviour are monitored by DCSF and regularly reviewed and RAG rated by the National Strategies and by the public at large through published performance tables;
- Government Office North East monitors our performance towards meeting our Local Area Agreement Targets and our 14-19 Progress Check monitors how well we are meeting a range of KPIs such as NEET reduction;
- The CPA evaluates the Council's performance in the round;
- We seek regular feedback from students, parents/carers and the wider community through the ViewPoint and Youth ViewPoint panels, the Stockton Youth Parliament and representation on the Children's Trust Board.

Monitoring and evaluation of KPIs at individual school level:

- The Council monitors analyses and evaluates achievement of statutory targets and other performance indicators as part of discharging its statutory duties;
- Schools monitor, review and evaluate their own outcomes through robust self evaluation in the School SEF;
- SIPs conduct termly visits to designated schools and make evidenced-based judgements on the school's performance, quality of self-evaluation and planning for improvement. Their evaluations are made available to the governing body. In National Challenge schools this role is discharged by the National Challenge Adviser. SIPs and the National Challenge Adviser will have specific responsibility for supporting and challenging their schools in the leadership and management of change;

- In schools that are categorised as schools of concern, the designated support adviser monitors and evaluates the school's progress towards meeting the targets in its action plan;
- Ofsted and HMI inspections of schools give external validation to all judgements.

Change Management Group

Our BSF Change Management Group was established in November 2008 bringing together all secondary headteachers, college principals and key officers of the Council. This Group is a non-statutory mechanism established within the Stockton-on-Tees Secondary Heads and Principals' Group. Its remit is to influence planning and delivery of the Council's BSF Strategy. The key strategic objectives of the Group are to:

- Develop a vision for transforming learning across the secondary sector in Stockton-on-Tees;
- Promote effective collaboration to ensure genuine transformation of learning for all children and young people in the borough;
- Implement strategies to achieve the transformational objectives of Stockton-on-Tees's BSF programme;
- Act as a consultative body for the planning and implementation of the BSF strategy across the borough.

The Group specifically promotes the development and implementation of the BSF strategy in three broad areas of activity:

- Activity that involves the development and implementation of strategy and collaboration to achieve educational transformation through BSF across the borough;
- Proactive work that aims to target and develop specific aspects of the programme;
- Evaluative work that seeks to monitor the impact of strategies implemented to deliver BSF across the Council.

Drawn from this group, effective and inclusive task groups have been established around the key work streams (Transforming Education, ICT, Technical, PE & Sport, Finance, and Change Management). These Task Groups include Council officers from many services (e.g. Planning, School Effectiveness, and Finance); partner stakeholders (e.g. School Sport Partnership managers, headteachers and college principals); and external Advisers contracted to support the project. These co-ordinated resources ensure that the programme is delivered, stakeholder and partner buy-in is assured, and true transformation is achieved.

7.3 Workforce Development

High quality CPD

The fundamental aim will be to equip colleagues with effective approaches, behaviours and techniques which they can apply to all aspects of BSF development – ICT scoping and development; curriculum transformation; embedding personalised learning; opening out 14-19 opportunities; championing inclusion and SEN and driving forward integrated services and ECM development.

As part of the BSF change programme we will implement comprehensive high quality professional development (CPD) opportunities to secure the educational transformation of pedagogy, practice and curriculum. This will ensure all stakeholders – schools and their communities, Council personnel and their partners – are well positioned to make the most of BSF development and bring about

genuine transformation. The two City Learning Centres in the borough will play a leading role in workforce development as the principal bases for CPD activity.

The concept of collaborative CPD days across the borough is well established, building on the opportunities for joint working afforded by LIG. Two days have been agreed next academic year: one in November that will focus on curriculum and workforce developments for 14-19, and one in March modelled on the Deeps.

The CPD offered will draw upon a range of expertise and providers including the Council's workforce development team, to secure the highest quality and best value support. To expand the work on leadership a former member of the Advisory team is taking up a post within the Workforce Development Team. The focus for this post will be continuing the successful induction programme for new headteachers, creating new programmes to support schools in challenging circumstances, developing succession planning and tailored programmes as part of the ongoing development of system leadership.

Where possible, CPD will be delivered as a planned suite of training rather than one-off events. This will include drawing upon local expertise from leading practitioners across Campus Stockton including Northfield (an ITT Training School), Conyers (whose high performing specialist status is leadership), specialist training provision from within the Council including the Workforce Development Team, and also expert contribution from national and international programmes, such as the NCSL, SSAT, TDA and local universities. Training leaders and developing curriculum models are developmental priorities across Campus Stockton and increasingly participants will have the opportunity to continue their learning and development after the day's training as part of a planned training offer. This will both speed up the rate of change and make it sustainable.

It was agreed in July 2009 that the choices that individual staff make should fit with Campus Stockton priorities, whole school priorities identified through ISSfC, school/college development plans or individual professional needs identified through performance management and agreed by the school/college/academy senior leaders.

To secure the change needed, the principle of the Deeps will underpin the suite of training opportunities that will be developed over the next few years. This will secure the development of a more enterprising and creative workforce who will transform pedagogy, practice and the curriculum in all our schools, based on four deeps: Learning, Support, Experience and Leadership.

Increasingly there is now a focus on developing joint Council /school working practices. The considerable BSF investment in ICT means that the highest quality CPD will be essential. The Council and City Learning Centres will work with our ICT Partner to produce a collaborative, comprehensive programme of training and development. This will include applications and operational skills training including CPD relating to the Learning Platform as well as CPD relating to pedagogy and curriculum practice.

Training will be provided for school governors as the new Ofsted framework is implemented to improve the quality and rigour of school governance. This will be facilitated by School and Governor Support Service (SGSS). There will be ongoing updates to engage governors in the BSF programme and where appropriate CPD sessions developed with SGSS.

We recognise the need to involve other stakeholders in a wider range of training opportunities and training will be developed in response to the:

- changes in the level of responsibility that students take for their own learning by including them in defining and delivering the Campus Stockton vision and in becoming partners in the learning experience by co-constructing the curriculum
- need to develop leadership training for students as this is a recurring theme through individual ISSfCs;
- opportunities for engaging parental and community involvement in managing change.

The objective is not merely to encourage these changes as part of the programme but to create a culture of organisational learning which will deepen the capability of the Council, schools, colleges and academies to sustain and improve standards and manage innovation and educational transformation in the longer term.

Building capacity

BSF is a long-term education transformation project, not a building initiative; we seek to deliver managed change towards, through and beyond the building phase. The challenge is to create “long-term engines for change” to implement and sustain the BSF priorities for future learning. This will involve ongoing collaborative working practices at a range of levels across schools and the Council. The Council has committed significant resource from a range of services including its BSF Project Team and the Education Improvement Service to support the transformation agenda. To bring a deep understanding of the educational and school improvement agenda to BSF, a principal adviser is changing roles from 1st August to become the BSF Change Manager. All the Wave 6 schools have nominated members of their leadership teams to lead transformational thinking in school and to represent their school at vision-to-reality meetings with external advisers and governors as well as leading change management programmes in their own schools. Schools have also been encouraged to use revenue flexibilities so that appropriate resources are aligned to meet the increased pressures.

7.4 Communication

The Stockton-on-Tees BSF team works closely with all stakeholders to ensure that the Future Learning vision for transformation is realised. The Council recognises that this vision can only be achieved with the continuing support and involvement of all key stakeholders including school staff, governors, Teaching Unions, Council officers and Diocesan representatives. It is vital that the change process is understood and owned by all stakeholders and that any potential conflict or disagreement is mitigated. This is achieved through the implementation of the Communications Strategy and Communications Plan (see also section 6.3)

Relationships with schools are well developed and the establishment of a weekly Change Management Group comprising of key members of the BSF team, all of the Borough’s secondary headteachers and college principals has ensured that all key leaders have been involved in the shaping of the Borough’s Strategy for Change. The Change Management Group provides a forum for task groups to consult and seek approval regarding the development of particular strategies which aim to assist in educational transformation. This group is also used to develop the schools’ understanding of the FM and ICT Managed Service requirements and discussions at these meetings have helped to inform the development of the LEP strategy and scope. Governors are also invited to Change Management Group meetings when appropriate to ensure they are fully informed and understand any implications for their school.

Workshops are ongoing in order to develop further schools’ understanding of how leadership and learning needs to be transformed to ensure the Borough’s Future Learning vision is realised. These

sessions are led by a member of Stockton-on-Tees Council's Educational Advisory team who is responsible for Change Management.

Other task groups, such as the ICT and PE & Sport groups have school representation, including both school staff and governor representation in some instances. School involvement at this level ensures the strategies developed by these groups reflect the aspirations and needs of the Borough's schools. Monthly meetings with school workforce Union representatives ensure that communication is open and any concerns or issues are quickly and effectively addressed.

Each school has a nominated BSF lead. The BSF lead is the main interface between the school and the BSF team. They are kept well informed of BSF developments on a school-by-school basis and are responsible for the delivery of all BSF individual school-related tasks as well as disseminating information to appropriate school staff, governors, pupils and parents.

Regular meetings also take place with individual schools as required and these often involve the headteacher, BSF lead, governors and appropriate school staff, and governor drop-in sessions are held to keep all of the borough's school governors informed about BSF.

7.5 TUPE

The BSF programme has implications for staff employed in affected schools, for centrally-employed staff working in those schools, and staff employed by contracting organisations providing services to schools.

Where schools are to close and academies established in their place the staff employed at those schools will be entitled to transfer on their existing terms and conditions to the new academy under the provisions of the TUPE (Transfer of Undertakings Protection of Employment) Regulations.

The reorganisation of schools will also have implications for staff employed within those schools that are to remain maintained by the Council.

Through BSF there will be changes to the way the ICT is provided and staff currently undertaking that role in each school will transfer on their existing terms and conditions of employment to the new provider. This will ensure a consistent approach to high quality ICT provision.

The council will consult fully with all affected staff both individually and collectively through their unions and governing bodies to ensure that they fully understand the implications of the BSF programme and how it may affect them. The council will ensure that the staffs are informed at all relevant stages of the tendering process and that they are fully aware of the timescales. The Human Resources Service has developed a staffing protocol which is subject to consultation with relevant parties. The protocol deals with the range of HR issues that will arise under the change programme, and provides a structured procedure for appointment to the new schools. Staff within the Human Resources Service have experience of similar programmes and are therefore equipped to deal with such issues efficiently and effectively. The senior HR Advisory Manager is a member of the BSF Project Team and operational HR staffs have been designated to deal with the operational issues when they arise.

The staffing protocol will seek to maintain the morale of the staff currently working within Stockton-on-Tees schools and will aim to retain and develop high quality staff wherever possible. This will be done by all parties to the staffing protocol working together and having joint ownership of the process.

Representatives of the trade unions and professional associations have participated through the normal consultative arrangements and have also been involved in specifically convened consultation groups involved with the development of the BSF proposals. Representatives of the workforce are key stakeholders in BSF planning and will continue to have a vital role in the future.

In preparing the information relating to employees within scope for a TUPE transfer, the Council will work in accordance with the model statement determined by Partnerships for Schools.