

## Update on Schools Capital Portfolio Report – January 2014

### Appendix 4 – Partnership Approach

The information below is extracted from a report provided to Oakington Manor Primary as the basis of the partnership approach to working with schools.

#### 3.0 Proposal

3.1 This proposal covers the key areas to consider when embarking upon a partnership project for school expansion. It represents a change in the Council's current ways of working with schools and seeks to address the aspirations of Oakington Manor as described by the School; principally the requirement to have greater immediate control over the quality of the end product, i.e. the new building, and to have greater direct input into the project delivery during its lifetime.

3.2 The first principle of this proposal is that while it is a partnership project between the School and Council, all the risks of delivery sit with the Council.

3.3 The following partnership approach is proposed:

- i. The School's feasibility study would be used as the basis of the Council's feasibility design and cost estimate. This work will inform the business case for the project proposing a recommended option with full costing and risk analysis. This will be submitted by the Council's Project Manager for approval by the Schools Capital Portfolio Board in February 2015.
- ii. The School and Council would jointly sit on any evaluation panels for consultant and/or contractor appointments.
- iii. The School would be a full partner in the Project Board which would oversee the delivery of the expansion project at Oakington Manor. This Project Board makes decisions about large changes to the project which require the use of project contingency and guides actions required to resolve project risks and issues in order to mitigate any potential change to the overall project in terms of time, cost and quality.
- iv. The Council project manager would take responsibility for preparing documentation to meet Council requirements including the Project Status Report. This would be provided directly to the Head teacher and Governing Body (when Project Board papers are issued) to enable the school representative at the Project Board to advise on the School's view of project progress and to enable escalation of issue resolution within the School if required.
- v. The School's nominated representative would attend all project design and progress meetings including contractor site progress meetings. The School's representative would advise on the School's requirements directly to the project team (external project manager/contract administrator, architect etc) and contractor.
- vi. The School's nominated representative could request contract variations/changes directly on behalf of the School to the Council's external

project manager/contract administrator (currently Capita are employed on the Phase 2 and 3 Programme, however a new appointment may be made). These changes will be instructed in accordance with the agreed change control process or directly instructed by the contract administrator if there is written confirmation that any additional costs incurred by the change will be funded by the school.

- vii. This approach will be described within the legal agreement between the School and the Council that would grant the Council rights to build on the Foundation School's land; this is the 'development agreement'.
- viii. The procurement of contractors will be undertaken in partnership, with the Local Authority taking responsibility for meeting financial regulations and securing Cabinet approval (these requirements exist whether the Local Authority or the School carries out the procurement).

3.4 In addition, the usual ways of working with schools would continue to apply in this new partnership approach. These include:

- i. The Council has responsibility for the provision of sufficient school places on time and to make necessary arrangements, in partnership with the school, to ensure these places are delivered.
- ii. The Council's Project Manager will manage the project programme and report monthly on progress to the Project Board from the initial start up of the project to full project closure. This report includes an update on the school's view of the project.
- iii. The cost and budget for the project will be shared with the School from the start up stage. The Council and School will work together to deliver the required accommodation within the available budget. The Council will be clear about the items it considers are outside the scope of the agreed criteria for school expansion projects and will request that either the School provides additional funding for those items, review any items that are within scope but are less important to the school in order to compensate for the out of scope items or agree that the out of scope items are not included in this project but where possible the design enables them to be added at a later date by the school (should funds allow) after project completion.
- iv. The School and Council will work together with the appointed design team and project consultants to develop the design in accordance with current guidelines. Regular meetings will be arranged between the School and architect to develop design; typically these will be fortnightly from the feasibility stage prior to planning submission. The School's own architect or other professional adviser would be part of this meeting.
- v. The Council's Project Manager will write all reports to Cabinet seeking necessary approvals for the project.
- vi. The Project Board is chaired by the Capital Programme Manager and attended by officers from the Children and Young People and Finance departments; as well as the School in this case. The Capital Programme Manager reports on the project as part of the Phase 3 Primary School Expansion Programme at Programme Board level chaired by the Operational Director – Property and Projects and attended by Operational Director – Early Help and Education as well as equivalent officers from Planning, Legal and Finance. The project and programme would be ultimately overseen by the Schools Capital Portfolio Board which is attended by the Strategic Director –

Children and Young People and equivalent Directors, chaired by Strategic Director – Regeneration and Growth. This governance structure oversees the whole Schools Capital Portfolio and ensures that decisions about individual projects are taken fairly and consistently in the context of the wider objectives.

- vii. The Council submits the planning application and is responsible for actions to secure approval. The Council and School will work together on detail for the planning submission; typically this includes this school travel plan and associated mitigation.
- viii. In addition to this school attending monthly site progress meetings mentioned above, regular site liaison meetings (typically weekly) will be held once work commences on site, this will specifically cover practical matters such as access, deliveries, noisy works etc that may impact on school operation. Site visits for staff will be arranged on a regular basis.