

**Business Case Addendum Neath Port Talbot
Ysgol Newydd (Margam) 3-16 School**

Local authority name - Neath Port Talbot

Project name - Ysgol Newydd (Margam) 3-16 School

Business case stage - SOC/OBC

Addendum date - June 2016 – Version 2

PLUS

**Additional Strategic Case information requested on
29 July 2016**

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Additional information requested 29 July 2016 from Policy Colleague

Strategic Case: Question/issue:

Assessor's Full Comments:

The local authority wants to build the secondary school with an additional 200 places to take account of another school reorganisation. However, we will need a more detailed explanation than the following:

The extra pupils will result from an additional proposal which is subject to consultation and approval around the next phase of secondary school reorganisation east of the County Borough.

Would you ask the local authority to name the reorganisation and explain how it will impact on Dyffryn.

I note the other information the local authority has provided about primary school capacities. However, I have noticed the following:

Cwmafan Primary School was established in January 2015 with a capacity of 420 pupil places. So with 377 pupils it should not be "full to capacity" there should still be 43 surplus places. Pupil projections provided by the local authority show pupil numbers falling to 346 by 2021.

Central Primary School was established in September 2015 also with a capacity of 420 pupil places. So with 395 pupils it also should not be "full to capacity" there should still be 35 surplus places. However, pupil projections show the number of pupils increasing to 424 by 2021.

Pupil projections show the pupil numbers at Eastern Primary School falling to 176 by 2021; at Coed Hirwaun Primary falling to 134 by 2021; and at Groes Primary School falling to 134 by 2021.

Given the falling pupil numbers in this area and surplus places I wonder if the local authority needs to construct a new school of 210 places to replace Groes Primary School. Has the local authority, for example, considered closing Groes Primary School and increasing the capacity of Eastern Primary School from 184 to 315 (1.5 form entry)?

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LA Response

A. Accommodation capacity at Coed Hirwaun Primary, Central Primary, Eastern Primary and Cwmafan Primary schools

Central Primary

1. The capacity of Central Primary school is 420 full-time and 100 part-time pupils. The number of pupils on roll in January 2016 was 395 full-time and 79 part-time. As at August 2016 there were 397 full-time and 96 part-time pupils on roll.
2. There are new housing developments planned for the area served by Central Primary school. These total 435 units which, potentially, could generate demand for a further 92¹ primary school places which would remove any surplus places at the school even if current numbers were to be maintained. However, projections suggest that full-time pupil numbers will increase to 421 by Jan 2019² (424 by 2021). This, combined with potential pupil numbers from planned new build homes, would result in a pupil population of 513 in 2019. This number could be reduced to 498 if offset against the current demand for places at Welsh-medium primary schools³ and reduced further by 14 to 484 if the balance of potential transfers between the catchment areas of Groes Primary and Central Primary schools transpires (see paras 19 & 20 below). This still leaves the school notionally 64 places oversubscribed, the effect of which is likely to impact on the neighbouring schools of Eastern Primary and Cwmafan Primary.

Eastern Primary

3. The capacity of Eastern Primary school is 182 full-time and 31 part-time pupils. The number of pupils on roll in January 2016 was 184 full-time and 30 part-time. Projections suggest that full-time pupil numbers will decrease to 183 by 2019² (176 by 2021) and be reduced further by 10 to 173 if the balance of potential transfers between the catchment areas transpires (see paras 19 & 20 below). This would result in 9 surplus places.
4. Currently, there are no housing developments planned for the area served by Eastern Primary school although, as the neighbouring school, planned qualifying housing units falling within the area served by Central Primary school (see above) could impact.

¹ Qualifying housing units x 0.21 (primary phase education)

² The new school is intended to open in Sept. '18. The nearest reference point for pupil projections is Jan '19

³ 17.2% (primary phase education)

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Cwmafan Primary

5. The capacity of Cwmafan Primary school is 420 full-time and 96 part-time pupils. The number of pupils on roll in January 2016 was 377 full-time and 68 part-time. As at August 2016 there were 372 full-time and 75 part-time pupils on roll. Projections suggest that full-time pupil numbers will maintain at 377 in Jan 2019² (346 by 2021).
6. There are new housing developments planned for the area served by Cwmafan Primary school. These total 230 units which, potentially, could generate demand for a further 49¹ primary school places. This number could be reduced to 40 if offset against the current demand for places at Welsh-medium primary schools³ and increased further by 3 to 43 if the balance of potential transfers between the catchment areas of Groes Primary and Cwmafan Primary schools transpires (see paras 19 & 20 below).
7. As the neighbouring school, planned qualifying housing units falling within the area served by Central Primary school (see above) could impact. Assuming 55 of the oversubscribed pupil numbers at Central Primary school are accommodated at Cwmafan Primary schools then, notionally, the school would be overfull by 55 places in 2019.

Coed Hirwaun Primary

8. The capacity of Coed Hirwaun Primary school is 159 full-time and 25 part-time pupils. The number of pupils on roll in January 2016 was 163 full-time and 29 part-time. Projections suggest that full-time pupil numbers will decrease to 138 by Jan 2019² (134 by 2021). This number could fall to 116 if the balance of potential transfers between the catchment areas of Groes Primary and Coed Hirwaun Primary schools transpires (see paras 19 & 20 below).
9. Currently, there are no new housing developments planned for the area served by Coed Hirwaun Primary school and its location makes it unlikely to be impacted by the planned housing developments in the Central Primary and Cwmafan Primary catchment areas. Coed Hirwaun serves a rural village development some 3 miles from the neighbouring Neath Port Talbot primary school, i.e. Groes Primary.

B. Single school at Taibach combining Eastern Primary and Groes Primary schools

10. A single school providing for the combined catchment areas of Eastern Primary and Groes Primary based at the existing Eastern Primary school site is discounted as an option for the following reasons:
 - a. Eastern Primary school site has limited potential for expansion. It has no on-site playing field and a separate, albeit near adjacent, nursery provision (see appendix 1). The existing primary school

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has capacity for 182 full-time pupils and with 184 full-time pupils on roll (Jan '16) it has no surplus capacity.

- b. The area of the Eastern Primary school site (excluding nursery & off-site playing field) is 1778m². The area of the nursery site is 1025m², providing a combined site area total of 2803 m². The area of the off-site playing field is 5525m².
 - c. The footprint of the main teaching block at Eastern Primary school is 738m² and the nursery unit is 151m², a total of 889m².
 - d. The required BB99 site area of a non-confined school development for approx. 380 pupils (combined f/t & p/t nursery as at Jan '16) is 16790m², whilst a confined site option requires 5370m². The required footprint of the building alone is 2050m².
 - e. Even a two storey construction would cover a substantial area of the site and leave insufficient area for play surface and car parking
11. As such, a proposal to provide for both Eastern Primary and Groes Primary schools on the existing Eastern Primary school site is discounted.
 12. The option of building a new combined school on the off-site playing field would be restricted to a confined site design. Even then, alternative off-site fields would need to be provided and the potentially vacated sites of the existing primary school and nursery are not big enough to accommodate the required playing fields.
 13. In addition, enlargement of existing provision at the existing site or at the off-site playing field is likely to present access and highway issues and there are no obvious alternative candidate site(s) in the area.
 14. As stated in previous correspondence, the preference would be for the development of Eastern Primary school to form part of considerations involving future school reorganisation plans for Central Primary school. This will allow the potential of a vacated Dyffryn (lower) School site to be maximised and suitable provision to be made to accommodate children from new housing developments in the area.
 15. A single school providing for the combined catchment areas of Eastern Primary and Groes Primary based at the existing Groes Primary school site is also discounted for similar reasons of site constraint as capacity on the Dyffryn School/Groes Primary site is not unlimited.

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C. Justification of pupil numbers for primary phase education at Ysgol Newydd (Margam)

16. The forecasted pupil roll for the primary phase element of the 3-16 school, Ysgol Newydd (Margam), is underpinned by the following assumptions:
- the new school will provide for children from the area currently served by Groes Primary school; and
 - the new school is likely to attract pupils from within the catchment area who would otherwise have attended ‘same category’ schools in preference to Groes Primary. As such, the forecasted pupil roll for the new school anticipates the admission of such pupils.
17. Forecasted pupil numbers based on the January 2016 pupil roll at Groes Primary school suggest that full-time pupil numbers will remain relatively static over the next five years.

Table 1

Groes Primary School				
Projected NOR at Jan 2017	Projected NOR at Jan 2018	Projected NOR at Jan 2019	Projected NOR at Jan 2020	Projected NOR at Jan 2021
144	143	145	147	148

18. The pupil roll (full-time and part-time) at Groes Primary school comprises children from the school’s catchment area and other nearby schools (table 2).
19. Of these, only some 62% reside within the catchment area of Groes Primary school. Significantly, approx. 20% are from the Eastern Primary school catchment area.

Table 2

School	Pupils*	% of Total
Awel y Mor	1	0.60%
Blaenbaglan Primary School	3	1.81%
Central Primary School	10	6.02%
Cwmafan Primary School	6	3.61%
Cymer Afan Primary School	4	2.41%
Eastern Primary School	32	19.28%
Eastern/Groes Primary School	3	1.81%

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Groes Primary School	103	62.05%
Sandfields Primary School	2	1.20%
Tywyn Primary School	1	0.60%
OOC	1	0.60%
Total	166	100.00%

Data as at: 080216

20. An analysis of children living in the Groes Primary school catchment area (table 3) shows a total of 225 primary age pupils, 184 of who are in full-time placements with the majority of these attending partner primary schools to Dyffryn School.

Table 3

School	All Pupils	F/T R - Y6	% of Total All Pupils	% of Total F/T R - Y6
Awel y Môr Primary	1	1	0.44%	0.54%
Blaenbaglan Primary	6	5	2.67%	2.72%
Blaenhonddan Primary	1	1	0.44%	0.54%
Central Primary	24	21	10.67%	11.41%
Coed Hirwaun Primary	28	22	12.44%	11.96%
Croeserw Primary	1	1	0.44%	0.54%
Cwmafan Primary	3	3	1.33%	1.63%
Eastern Primary	45	38	20.00%	20.65%
Gnoll Primary	1	1	0.44%	0.54%
Groes Primary	103	83	45.78%	45.11%
Sandfields Primary	1	1	0.44%	0.54%
Traethmelyn Primary	1	1	0.44%	0.54%
Tywyn Primary	9	6	4.00%	3.26%
Wauanceirch Primary	1	0	0.44%	0.00%
Total	225	184	100.00%	100.00%

NB: This table does not include pupils attending Welsh-medium or Faith schools.

Data as at: 080216

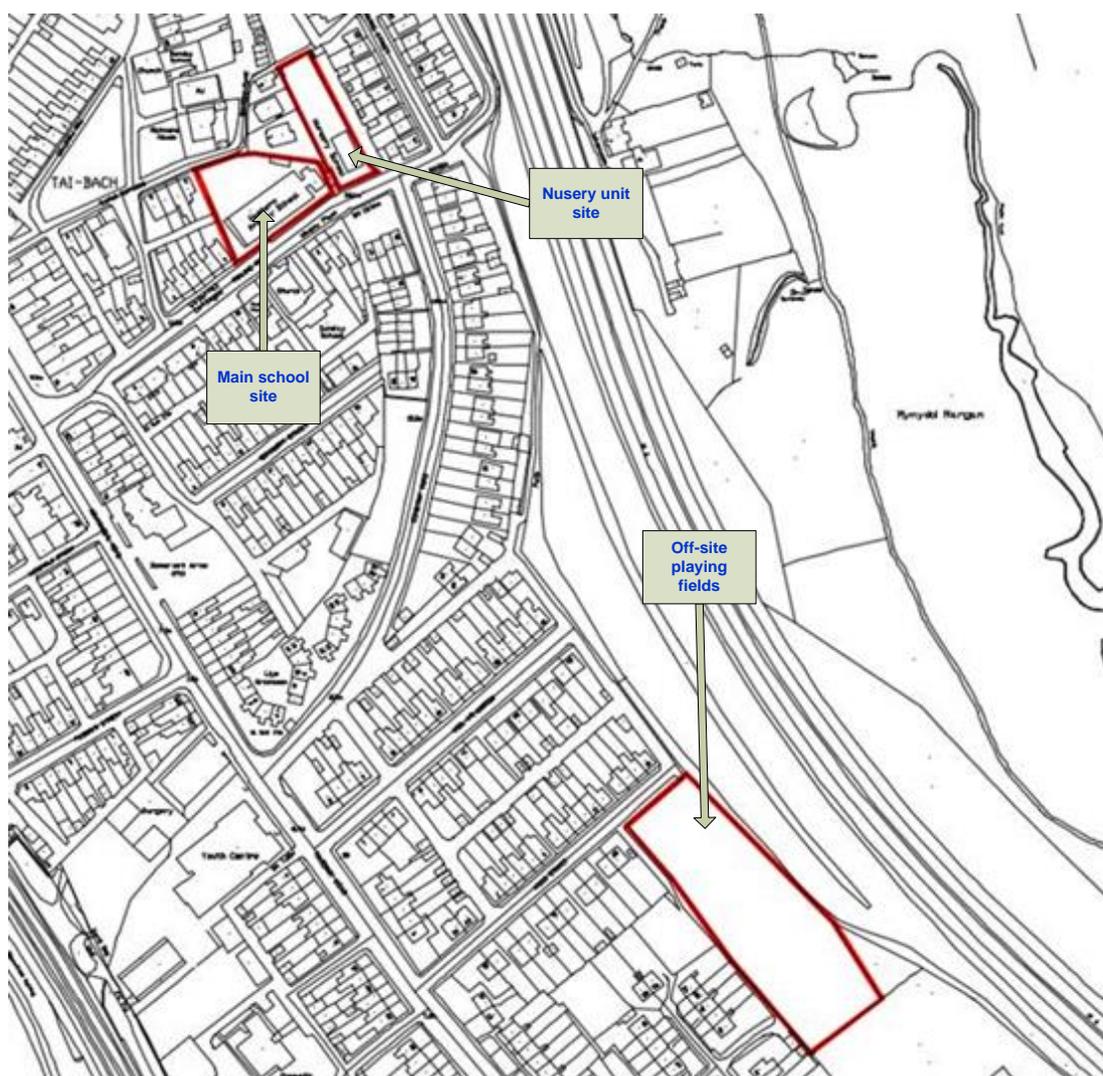
21. Given that there is no evidence to suggest a decline in the number of children living in the catchment area and that a new school build is likely to be an attractive option for pupils/parents, it is not unreasonable to anticipate that a significant number of catchment area pupils equivalent to those identified in Table 3 will seek admission to the new school.

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22. Over the next five years there are no significant housing developments planned for the catchment area served by Groes Primary school. However, in the longer term a planned scheme of 70 new homes could potentially generate demand for a further 15 places, reduced to 12 when offset against the current demand for places at Welsh-medium primary schools³.
23. In this context, the Council's proposal for a new build, 210 place full-time/45 place part-time (nursery) primary phase education element at the new 3-16 school is justifiable. Based on 184 full-time pupils there would be 12% surplus capacity. Given that approx. 38% pupils currently attending Groes Primary school are from outside the catchment area, there should be little difficulty in filling any spare places at the school.

Appendix 1

Eastern Primary school – main school building, separate nursery and offsite playing field



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Economic Case: Question/issue:

Assessor's Full Comments:

Having read the LAs response I am content with most of their explanations and additional information but there are a couple of remaining points.

- Page 29 of the addendum – the 'do nothing' service solution I was referring to would include only necessary backlog maintenance and not any additional refurbishment as proposed in the option they mention.
- Page 35 – relating to the economic appraisal spreadsheet – I am not convinced of the need to appraise the options over the same period. Many business cases face similar issues when appraising both refurbishment and new-build options in the same analysis. The Treasury Green Book has addressed this and recommends that costs and benefits should be appraised over the lifetime of the asset in question which is typically assumed to be 30 years for a refurbishment and 60 years for a new-build. The like-for-like comparison comes from the EAC (equivalent annual cost) calculation which averages the total costs over the expected life of the asset whether 30 or 60 years. Comparing different options like these over the same period distorts the analysis by assuming that both options have the same life-span which is unlikely to be the case. NPC and EAC calculations take account of the different intrinsic value placed on costs at different times etc. (the discount rate) and allow a like-for-like comparison of options with different balances of capital and revenue costs, different time-frames etc.

The last point will need to be addressed before this can go to panel.

LA Response

24. 'The Do Nothing' Service Solution has been re-defined to include only backlog maintenance required over the next three years, which amends the capital amount required to £7,992,100. This is backlog maintenance identified at Dyffryn Upper and Lower schools, Groes Primary school and a potential third school, subject to consultation and approval in the next phase of secondary school reorganisation east of the County Borough. The amended option (Do Nothing) has been re-appraised over a 30 year investment period, with options 2 & 3 changing to 60 year appraisal periods.

As a result of this, the summary Net Present Cost and Equivalent Annual Cost are now:

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Discounted Cashflow (DCF) Summary Sheet		Inc. Optimism Bias		Excl. Optimism Bias	
Option No.	Option Name/Description	NPC (£m)	EAC (£m)	NPC (£m)	EAC (£m)
Option 1:	Do Minimum	146.9	7.72	146.6	7.70
Option 2:	Intermediate	192.5	7.34	191.9	7.32
Option 3:	Maximum	189.5	7.22	189.3	7.22

This shows that the Council's preferred option provides the best Equivalent Annual Cost. '

25. Please find below, an amended economic appraisal, with the following adjustments:

1. Option 1 (Do Minimum) using years 1-3 backlog maintenance, to the value of £7,992,100. Please note:
 - a. The Optimism Bias has been reduced to reflect the lower capital cost (pro rata); and
 - b. Lifecycle costs and risks remain the same
2. Option 1 appraised over 30 years
3. Options 2 & 3 appraised over 60 years

Using the EAC recommended by Welsh Government, this shows options 3 (the Council's preferred option) to be the most competitive.

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Amended YN
(Margam) NPC with nr

Local Authority response to Welsh Government following queries raised at the Business Case Scrutiny Group meeting on 6 May 2016

Strategic Case: Question/issue - Sports Division:

Authority to provide further details required on the community use of school sports facilities/resources.

Assessor's Full Comments:

The business case identifies 'quantifiable benefits' as localised access to sporting opportunities for the wider community and contains a target to increase the community use of school resources (e.g. playing fields) by 75% by Sept 2019. Could we ask for further details on this please and ascertain whether they have consulted the local authority's Sports Development Team?

In addition, Sport Wales has advised that the school received a grant from the Big Lottery Fund in 2005 to develop a half size Artificial Turf Pitch. This remains a key facility for the community so it's important we obtain these further details.

LA Response

The Council will be promoting close working between the Headteacher/Governors and the Sports Development Team (i.e. Council's Physical Activity and Sports Service [PASS]) to ensure sports facilities at the new school are fully utilised and accessible to the community.

The Council and the Leadership at the new school will be mindful of the expectations of partner primary schools, local sports organisations and national sports governing bodies.

Facilities and community use will be further developed as appropriate to cater for identified and potential unmet local demand.

Provision will be in line within the requirements of Building Bulletin 98 and The Education (School Premises Regulations).

This new build project is funded via the 21st Century Schools Programme and, as such, the principal consideration will be to provide suitable, sufficient and sustainable facilities for the school pupil population.

The ATP provided through the Big Lottery Fund in 2005 will remain a key facility to be enjoyed by both the school and community.

The Council is also in a discussion with Sports Wales over a strategic approach to community sports provision.

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Strategic Case: Question/issue - Local Authority Reform and School Effectiveness

Authority to provide further clarity around options considered – e.g. to include other feeder primary schools in the area to Dyffryn.

Assessors Full Comments:

The investment objectives positively include improved learning outcomes for all learners across the age range and consideration of current performance levels is evident.

Would like to better understand whether options including other feeder primary schools in the area were considered, as the case only identifies Dyffryn Upper, Dyffryn Lower, Groes Primary school and other secondary schools in the area as being in scope.

LA Response

The partner (feeder) primary schools to Dyffryn School comprise: Central Primary, Coed Hirwaun Primary, Cwmafan Primary, Eastern Primary & Groes Primary. Groes Primary school currently shares a site with Dyffryn (upper) School.

A diagram showing the relative locations of the partner primary schools is set out below.

Cwmafan Primary School

Cwmafan Primary school is approx. 3.7 miles from the Dyffryn (upper)/Groes site.

It has 377 full-time and 68 part-time (nursery) pupils on roll and is full to capacity.

There is the potential to increase pupil capacity at this school on this site.

It serves a wide catchment area and relocation to the Dyffryn (upper)/Groes site could mean a 6 mile journey for some primary school pupils and would require the provision of school transport for all pupils.

In addition, the constraints associated with the Dyffryn (upper)/Groes site, both in terms of size and vehicular access, together with the location of other, nearer schools, makes the inclusion of this school in the Dyffryn/Groes proposal impractical.

As such this option has been **discounted**.

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Coed Hirwaun Primary School

Coed Hirwaun Primary school is approx. 3.2 miles from the Dyffryn (upper)/Groes site.

It has 163 full-time and 29 part-time (nursery) pupils on roll and is full to capacity.

It serves the self-contained village of Coed Hirwaun and was built principally for this purpose.

Given the distance between the school sites, the provision of school transport for all pupils would be required.

In addition, the constraints associated with the Dyffryn (upper)/Groes site both in terms of size and vehicular access, together with the location and purpose of Coed Hirwaun primary school makes the inclusion of this school in the Dyffryn/Groes proposal impractical.

As such this option has been **discounted**.

Central Primary School

Central Primary school is approx. 1.7 miles from the Dyffryn (upper)/Groes site.

It has 395 full-time and 79 part-time (nursery) pupils on roll and is full to capacity.

It serves the catchment area of Port Talbot and is adjacent to the area served by Eastern Primary school. Central Primary is a split-site school that stands to benefit from the release of the Dyffryn (lower) School site whereupon, subject to the availability of capital funding, the infant and junior departments of the school can be brought together in a new build on a single site.

In addition, the constraints associated with the Dyffryn (upper)/Groes site, both in terms of size and vehicular access, together with the location of another, nearer school, makes the inclusion of this school in the Dyffryn/Groes proposal impractical and unwarranted.

As such this option has been **discounted**.

Eastern Primary School

Eastern Primary school is approx. 1.2 miles from the Dyffryn (upper)/Groes site.

It has 184 full-time and 30 part-time (nursery) pupils on roll and is full to capacity.

It serves the catchment area of Taibach and is adjacent to the area served by Central Primary school to the north-west and Groes Primary school to the

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south-east. The distance between Eastern Primary school and Central Primary school is approx. 0.7 miles.

A proposal to bring Central Primary school on to a single site in a new build would present an opportunity to consider including Eastern Primary school in such a development. Therefore, strategically, there is a 'better' alternative to be considered (within Band B of the 21st Century Schools Programme).

In addition, the constraints associated with the Dyffryn (upper)/Groes site, both in terms of size and vehicular access makes the inclusion of this school in the Dyffryn/Groes proposal impractical.

As such this option has been **discounted**.

Groes Primary School

Groes Primary school shares a site with Dyffryn (upper) School.

It has 140 full-time and 27 part-time (nursery) pupils on roll and has 54 surplus places.

It serves the catchment area of Margam and is adjacent to the area served by Eastern Primary school to the north-west.

The proposal to address category D buildings on the Dyffryn (lower) School site via a new build on the upper school site is constrained by the location of Groes Primary school.

The modest additional investment to include the primary school in the new build proposal allows a more flexible use of the site to accommodate the new build and associated outdoor facilities and also to provide a transformational approach to education provision via an all through, 3-16 delivery.

The proposed size of the new primary element of the 3-16 school is larger than the current roll of Groes Primary in order to take account of the 'new school build' effect.

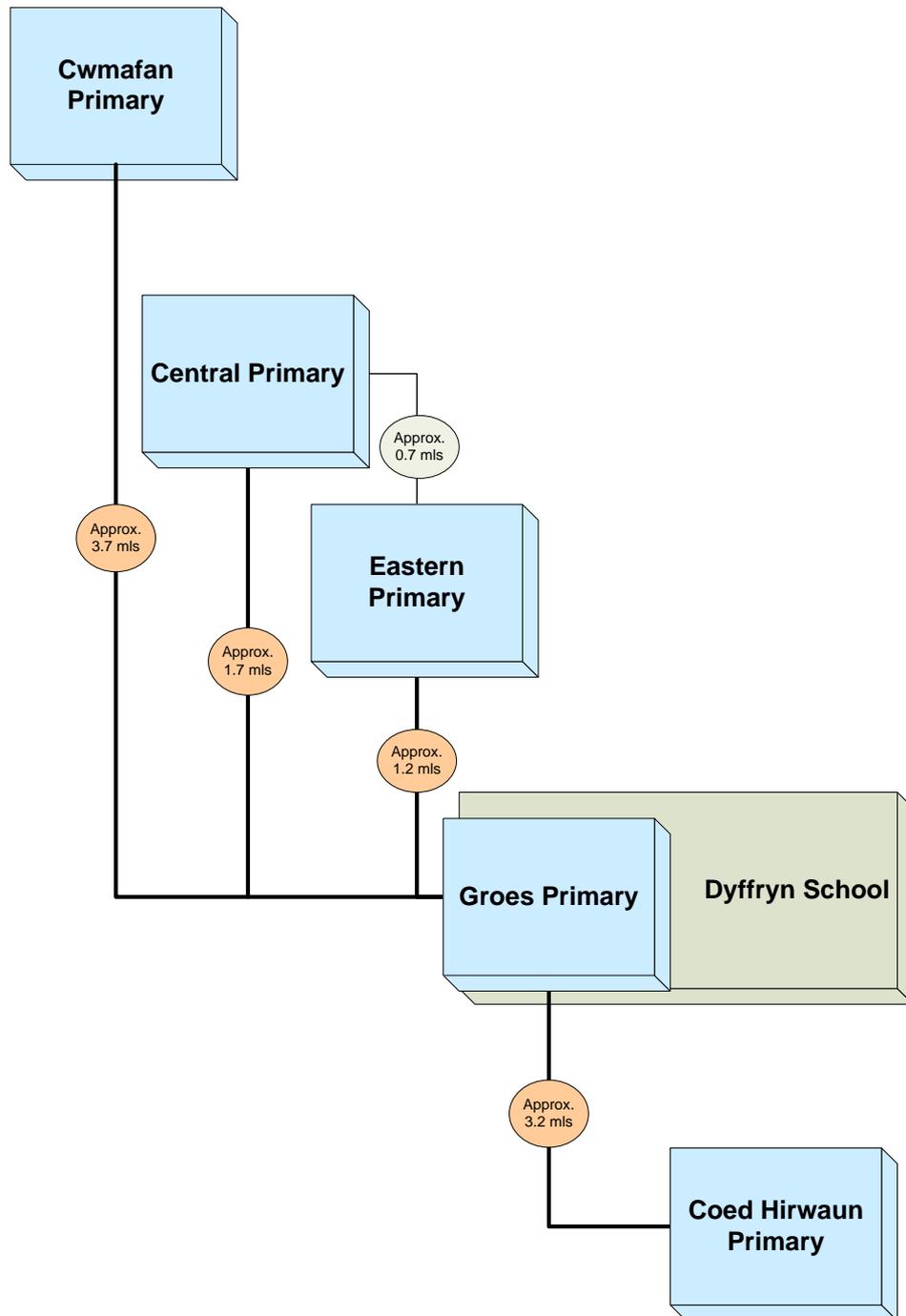
Approx. 225 pupils have been identified as living in the Groes Primary school catchment area.

The constraints associated with the Dyffryn (upper)/Groes site, both in terms of size and vehicular access are not as pronounced with this option.

As such this option has been included as part of Option3, within the Economic Case to the combined SOC/OBC.

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Partner primary schools to Dyffryn School
(Pelenna, Bryn & Cwmafan, Margam, Port Talbot & Taibach Wards)



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Strategic Case: Question/issue - School Governance and Organisation

Capacity proposed does not seem to be justified on the basis of the figures presented. Further justification required.

Assessors Full Comments:

Statutory proposals are likely to be needed if the LA goes for a 3-16 school as a single institution. No proposals have yet been started, but the LA recognises that there will be a risk if these are not supported.

Whilst the replacement of Dyffryn, given its condition is very desirable and it makes sense to consolidate the provision, we need further evidence of the number of places required.

The LA is saying that surplus places will be reduced.

Potentially they are taking into account the “about to be implemented” proposals relating to the Cwrt Sart/ Sandfields/Glanafan areas and the reduced capacity that could arise from this.

Some of the pupils currently served by Glanafan may have to migrate to Dyffryn when the new Baglan Secondary is implemented but it is not clear whether this is reflected in projected pupil numbers.

The current capacity of Dyffryn is 1056, so replacing it with a school for 1200 is unlikely to remove surplus places, particularly when the top projections are showing 932 pupils by 2020.

Likewise we need clarification that the capacity of Groes Primary is 194, and the LA is proposing a 255 primary facility to replace it. Top projections show 175 so it appears that a 210 primary would be ample.

Please explain why you are increasing capacity, as there is a high rate of surplus already at these schools.

LA Response

Capacity assessment of secondary phase education of 3-16 school

The proposal for the secondary phase education element of the 3-16 school is intended to provide for the area currently served by Dyffryn School together with the facility to accommodate a further c200 secondary age pupils.

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The extra pupils will result from an additional proposal which is subject to consultation and approval around the next phase of secondary school reorganisation east of the County Borough.

Capacity assessment of primary phase education of 3-16 school

The primary phase education element of the 3-16 school is intended to provide for the area currently served by Groes Primary school.

This school has 140 full-time and 27 part-time pupils on roll.

Pupil projections for this school suggest that the number pupils will increase slightly reaching 148 full-time and 28 part-time by 2021 (total: 176).

However, 225 pupils have been identified as currently residing within the area served by Groes Primary school (and, by default, the primary phase provision of the new school).

All of these could claim a place at the new school by virtue of the Council's admission policy which gives high priority to catchment area pupils.

It is appropriate, therefore, to anticipate the impact of a new, 21st Century school build which will inevitably attract pupils from the catchment area whose parents would have otherwise sought a placement for their child elsewhere.

In this regard, this proposal makes provision for primary phase education that is suitable and sufficient for the area intending to be served.

As such, a single form entry (210) with a 45 place part-time ($N_1 + N_2$) is considered appropriate.

Neighbouring schools are full to capacity.

A consequence of this proposal is that it presents an opportunity to more effectively manage pupil placements across the partner primary schools associated with Dyffryn School.

Strategic Case: Question/issue - Support for Learners

The authority to provide clarity that the school will accommodate the existing cohort of learners with SEN and how the build will support SEN provision generally.

Assessors Full Comments:

No information at this stage has been provided with regard to how the school will meet the needs of learners with SEN. The assumption is that the new

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build will accommodate higher than national average SEN learners at the existing Groes Primary School and Dyffryn Comp School.

LA Response

Special Educational Needs

January 2016 data indicates that 30% of pupils at Groes Primary and 24% of pupils at Dyffryn School are deemed to have additional learning needs, and receive support either at school level or from the local authority's Support for Learning team.

This could be to address a range of needs including speech and language difficulties, emotional and/or behavioural difficulties, hearing or visual impairment or physical development difficulties.

The Council's averages indicate that 23% of pupils at primary level and 29% pupils at secondary levels are deemed to have additional learning needs. This is equal to all Wales figures of 23% at primary and above the 23% figure at secondary level. Dyffryn School ALN data at 24% is below the LA average for pupils with ALN. Groes Primary is significantly above the primary averages at 30%; however the school has recently undergone an Estyn inspection where it was found that ALN pupils make good progress and that *'Provision for pupils with additional learning needs is good. The school has effective procedures and systems to identify pupils with additional learning needs at an early stage'* (Estyn December 2015).

Both schools are currently effectively meeting the needs of learners with ALN and it is expected that a new build 21st century school building will be at least as effective.

As all of the SEN pupils in Groes and Dyffryn are currently supported within their mainstream schools and it is anticipated that this support will be able to continue in a new school, with the added benefits of a purpose built environment with modern facilities and resources, ensuring that progress is maintained and improved.

It is planned that the new school would ensure that the right sort of provision for pupils is available –for example including some smaller rooms for intensive support groups or 1-1 work, improving on the provision that is currently available.

Specialist provision for a specific area of need is not seen to be required as part of the proposal and it is not intended to provide a learning support centre within the new school, and neither school has this provision currently.

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Economic Case: Question/issue - Knowledge and Analytical Services

The Authority to review the case for change, investment objectives, options appraisal and cost sheets.

Assessors Full Comments:

Overview: There are a number of issues with this case at various stages which need to be reviewed and addressed. I outline them in more detail below but in summary, the case for change is brief and does not identify the key problems to be addressed by this intervention, as such the investment objectives and critical success factors do not have a solid foundation and are solution-driven rather than targeted at the needs identified in the case for change.

The long list of options considered appears to be relatively narrow in focus and does not consider, for example, a mixture of refurbishment and new build, nor is a 'do nothing' option of maintaining the status quo without extensive refurbishment considered. There are issues to be addressed with the NPC calculations but on the basis of the figures provided the three options considered have relatively similar NPCs but the preferred option requires upfront investment of over £30m. The similarity of the NPCs suggests that a relatively small change on the expected costs of any of the options could feasibly change the preferred option, particularly between options 2 and 3. When compared with option 2, option 3 is expected to have a NPC around £2m lower but requires an additional upfront investment of over £5m, while this makes the option cheaper overall within the context of the 21st century schools programme careful consideration is needed of the opportunity cost of replacing a condition B building when the capital funding could otherwise be invested elsewhere.

Detailed comments:

The case for change is not clearly made – the investment objectives target various outcomes such as improved learner outcomes, increased well-being etc. and the section provides some basic data around staff and pupil numbers, building conditions and learner outcomes but does not explore what the problems are (e.g. how the stated learner outcomes compare to the national averages), and what is causing them. The investment objectives should build on the case for change by targeting the identified needs rather than targeting a preferred option such as a “stimulating all through teaching and learning environment in state of the art, 21st Century facilities”.

Page 6 – Investment objectives

- Objective 1 presupposes the preferred outcome, it should be focused more on the objectives (such as increased self-esteem and well-being of pupils), there may be alternative and more cost-effective options for delivering such an objective.

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LA Response

Following Welsh Government comments, the investment objective has been amended to:

‘To provide a stimulating all through teaching and learning environment in 21st Century facilities that will impact positively on the self-esteem and well-being of all pupils.’

This slight change, avoids any presupposition of a preferred option, as it can be similarly achieved through extensive refurbishment; remodelling or through a new build solution.

A review of the Service Solution Appraisal (at Section 3.4 to the Business Case) shows that each of the 6 options considered (at Section 3.4.1) have the same outcome against this amended investment objective. Therefore, there is no impact to the change.

- Objective 2 – some of these targets are missing a time-frame.

LA Response

Upon review, the following targets have been developed:

1. To attain level 1 or 2 for Performance and Standards in the National Categorisation system (by September 2019)
2. Pupil tracking data and core family data indicates that pupil outcomes have improved, and are at least in line with similar schools across Wales (by September 2020)
 - Objective 3 – measure – this should not pre-suppose the preferred option.
 - Objective 3 – target – presumably reducing surplus places by 600 will not result from just this case, it would help to be clear on what this case in particular will achieve.

LA Response

‘The principle of this Investment Objective was included as part of the Council’s Band A Strategic Outline Programme, and has been consistently used in the majority of the Council’s Band A schemes (with the exception of schemes involving Welsh Medium education). The Council has taken a programme view on this objective and, given that the reduction of surplus places in schools was a Welsh Government initiative, it is difficult to see how this can be interpreted as ‘skewed’ in favour of the preferred option.

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In terms of specifics, Section 2.2.2 (Existing Arrangements) shows clearly that the preferred option will remove circa 280 surplus places, while there is potential for the removal of circa a further 320 surplus places (as an additional proposal directly linked to the scheme), which is subject to separate consultation around the next phase of Secondary school reorganisation in the east of the County Borough.

As a result of Welsh Government comments, the target has been split, to reflect the immediate impact on surplus places (at the point the new school opens) and the potential long term impact (subject to public consultation and political will) :

1. Reduce Primary and Secondary surplus places in the Margam area by circa 280 places by September 2018
2. Reduce Primary and Secondary (cumulative) surplus places in the Margam area by circa 600 places by September 2020 in the east of the County Borough.
 - Objective 5 – target to increase the average daily uptake of Breakfast Club to 10% of eligible pupils by September 2019 – what is the rationale for this target? The case for change doesn't identify a problem in this area.

LA Response

The current position at Groes Primary school is that there is an above County average uptake of breakfast club (28.6% against a County average of 26.3%).

However, some schools are taking greater advantage of the breakfast club offer, with a neighbouring school nearing the 40% take up. It is the Council's aspiration to provide the best of facilities for pupils and therefore the target (increase of 10%) reflects this.

This links directly to pupil well-being and maximises pupils' attainment potential.

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Page 9 – the Investment Required section is solution-driven rather than driven by requirements, this is not helpful in making the case for the proposal.

LA Response

Details of the investment required are set out in the following table.

This table covers both educational and building requirements.

Scope	Educational	Buildings
Core (minimum)	<ul style="list-style-type: none"> • Curriculum that meets the need of learners, employers and the local community • Curriculum that meets statutory National Curriculum requirements and the Learning Skills Measure • Improve performance and outcomes at FP, KS2, KS3, KS4 • Informal and non-formal learning activities that promote learning, employability and engagement leading to improved outcomes and progressions • Teaching and learning that support the needs of learners and aspirations of the literacy and numeracy framework and digital future • A support programme to ensure learners wellbeing and self- esteem • Structure that supports effective leadership and management • Appropriately qualified and experienced teaching, support and managerial staff • Development of pupils' key skills • Appropriate ratio of teaching and support staff to learners • A programme for the training and development of staff • Provision for ALN/SEN learners within statutory requirements • Support, administrative and technical 	<ul style="list-style-type: none"> • To provide a school element (of the learning centre) of an appropriate size to meet BB98/99 area guidelines to form the basis of the design but applied flexibly • A building that provides a safe, healthy and accessible work and learning environment • Sustainable design – BREEAM excellent and low carbon footprint • Simplified asset management systems • Flexibility in the use of the asset • ICT infrastructure to support effective teaching, learning and management systems • Appropriately sized and accessible external facilities • Wet sprinkler installation • Areas that can be utilised by the Community • Internal and external assembly spaces (e.g. hall, dining area) • Appropriate staff facilities (e.g. flexible working area, with hot desk 'pods') and recreation area • Sufficient and appropriate toilets • Central and local storage (internal and external) • General administrative and

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Scope	Educational	Buildings
	staff structure	<p>support accommodation</p> <ul style="list-style-type: none"> • Modern production kitchen and dining facilities (refectory) • External spaces in line with BB98/99 and Learning Through Landscapes' recommendations • Safe access, secure staff/visitor parking and segregated vehicular/pedestrian movement • Drop off zone for buses, taxis (etc.) • Compliance with all H&S legislation • High levels of natural light and ventilation throughout • Acoustic design to follow recommendations of BB93 • Appropriate levels of controlled/zoned heating and lighting to facilitate community and external use during and outside of the normal school day • Appropriate communication systems • Good infrastructure • Flexible classroom space(s) • Break out space(s) • Classrooms fitted with interactive boards • WIFI available throughout the campus, with access / support for learners own devices • Catering facilities, with healthy eating options • Renewable and sustainable energy source • Recycling compound • Medical room

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Scope	Educational	Buildings
		<ul style="list-style-type: none"> • Outside seating areas • Robust building • Flexibility and adaptability of spaces
Desirable (intermediate)	<ul style="list-style-type: none"> • Community focussed facility supporting multi-agency working and third sector organisations • Increased curriculum that meets the wider needs of learners, employers and the local community • Continuously Improved performance and outcomes at FP, KS2, KS3, KS4 • Integrated informal and non-formal learning activities that promote learning, employability and engagement leading to improved outcomes and progressions • Excellent teaching and learning that support the needs of learners and aspirations of the literacy and numeracy framework and digital future • An integrated programme to promote and enhance learners wellbeing and self- esteem; • Structure that promotes effective leadership and management (reflecting the requirements of the WG distributed leadership programme) • Centre that attracts best qualified and most experienced staff • Effective ratio of teaching and support staff to learners • A structured programme of training and development for all staff linked to school's strategic priorities • Pupil voice / school council informing aspects of teaching and learning and curricular planning • Integrated planning and promotion of pupils' key skills across the curriculum 	<ul style="list-style-type: none"> • Reduced running costs/operational expenditure • Simplified day to day management • High degree of energy efficiency • Co-ordinated facilities management • Zoned and bespoke facilities for flexible learning and community use • Adaptable and flexible construction • Enhanced ICT infrastructure and connectivity (to support teaching and learning) • A fully integrated ICT-rich learning environment combining fixed work areas and wireless connectivity • Community Focused learning centre • Highly flexible and adaptable accommodation to meet the demands and expectations of 21st Century teachers / lecturers / support staff and learners • Flexible internal and external assembly spaces (e.g. hall, dining areas) • Enhanced staff facilities including confidential meeting rooms and PPA areas • High quality pupil toilet facilities appropriately distributed that can be readily supervised

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Scope	Educational	Buildings
	<ul style="list-style-type: none"> • Opportunities for pupil centred learning • Enhanced provision for ALN/SEN learners • Collaboration with the community and partner agencies, e.g. health, Social Services 	<ul style="list-style-type: none"> • General administrative and support accommodation appropriately located, sufficient in size and number • Modern production kitchen and dining facilities to promote healthy lifestyles • Integrated communication systems • Effective infrastructure • Enhanced accommodation to provide for greater collaboration with partner and third sector organisations • Provide a Multi-Use Games Area (MUGA) • Music facilities, equipment and practice rooms • Art and design facilities • Outdoor teaching space • Language laboratories • CCTV as a security feature for student and public safety • Flexible space for partner services • Drama / dance studio
Optional (maximum)	<ul style="list-style-type: none"> • Facility with multi-agency delivery which is fully integrated into the community • Optimised curriculum that meets the needs and aspirations of learners, employers and the local community • Sector leading performance and outcomes at FP, KS2, KS3, KS4 • Embedded informal and non-formal learning activities that promote learning, employability and engagement leading to improved outcomes and progression to FE, HE, 	<ul style="list-style-type: none"> • Master-plan design for centre – for now and the future • Renewable technologies on building • Optimised running costs/operational expenditure • Optimised facilities management • First Class ICT infrastructure and connectivity • Using new school facilities in tandem with the local community to provide new learning

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Scope	Educational	Buildings
	<p>training or employment</p> <ul style="list-style-type: none"> • Sector leading teaching and learning • A fully embedded programme to promote and enhance learners wellbeing and self -esteem (ensuring access to specialist support and advice, available to all learners) • A Structure that embeds effective leadership and management (reflecting the requirements of the WG distributed leadership programme with a relentless focus on improving learner outcomes) • Centre that gets and retains best qualified and most experienced staff • Access to sport and leisure facilities that optimise curriculum delivery and offer additional learning opportunities • A structured programme of extensive training and development for all staff linked to the learning centre's strategic priorities • Pupil voice / school council informing curricular planning, delivery and evaluation of provision • Integrated planning and promotion of pupil key skills maximising learning opportunities across the curriculum including pupil centred learning • Enhanced SEN/ALN provision • Extensive collaboration with the community and partner agencies • Community IT resource base • Community regeneration • A fully integrated school-based Children's Service • Fully integrated community learning centre catering for learning, cultural, sporting and multi-agency activities. 	<p>opportunities</p> <ul style="list-style-type: none"> • Increased quality of fittings (over and above core and desirable requirements)

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Section 2.2.4 – The Main Benefits identified are quite repetitive and largely seem to refer to outcomes rather than benefits, for example continuity of pastoral care is an outcome, I am not clear whether there is evidence to suggest that this is a beneficial outcome for any of the stakeholders. It is also not always clear how the investment objectives will lead to the outcomes described – e.g. how will objective 1 (To provide a stimulating all through teaching and learning environment in state of the art, 21st Century facilities that will impact positively on the self-esteem and well-being of all pupils) lead to a quantifiable reduction in anti-social behaviour and disaffection or provide a catalyst for community regeneration? These benefits should be reviewed to make sure they are benefits (rather than outcomes) and clearly linked to the investment objectives.

LA Response

Following Welsh Government comments, the main benefits associated with the scheme were reviewed on 14th July 2016, by a team comprised of educationalists; property specialists and representatives from the Council's Finance Department.

The review consisted of an analysis of stated benefits (from the Dyffryn/Groes combined SOC/OBC) and, where the group considered that benefits were appropriate a ✓ has been allocated alongside the entry. Where it is uncertain whether a stated benefit is simply an 'outcome', a ? has been allocated against the entry.

It is fair to say that the distinction between outcomes and benefits can be difficult to appreciate; since benefits only occur as a result of a successful scheme (i.e. benefits are, de facto, outcomes).

While there may be 'repetition' in benefits (as often benefits will be related to more than one investment objective), the review took into account where benefits should sit (and were they applied to more than one investment objective). In some cases this has resulted in benefits being allocated to different investment objectives.

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The review provided the following analysis:

IO	Stakeholder	Main Benefits Criteria by Stakeholder Group (Reviewed 14/07/16)
1.	Learners	<p><u>Quantifiable Benefits</u> Improved attendance ✓ Securing positive learning experiences ✓ Improved learning outcomes ✓ Improved engagement with the learning process ✓ Improved access to learning materials (physical, academic and emotional) ✓ Higher number of positive learning role models? Equality of opportunity to access excellent teaching and learning experiences?</p> <p><u>Non Quantifiable Benefits</u> Inspired learning ✓ Better promotion of key skills? Creating independent learners ✓ Improved self-esteem and well-being ✓ Raising aspirations? Continuity in pastoral care i.e. seamless progression from primary to secondary schools ✓ (N.B. - this will result in improved learning outcomes for individual learners).</p>
	Staff	<p><u>Quantifiable Benefits</u> Access to a wider range of teaching materials (state of the art ICT and other emerging technologies) ✓ Greater opportunities to use a wider range of different learning / teaching styles? Increased opportunities for continuous professional development?</p> <p><u>Non Quantifiable Benefits</u> Access to and sharing of sector leading practice via Professional Learning Communities ✓ Greater job security ✓ More opportunities to facilitate distributed leadership and increased responsibilities ✓</p>
	Employers	<p><u>Quantifiable Benefits</u> Improved levels of recruitment, quality and retention of staff ✓ Reduced sickness levels of staff ✓</p>

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IO	Stakeholder	Main Benefits Criteria by Stakeholder Group (Reviewed 14/07/16)
		<p><u>Non Quantifiable Benefits</u> Reputational improvement for the County Borough Council ✓ Assured business continuity ✓ More effective staffing structures – management and support ✓</p>
2.	Learners	<p><u>Quantifiable Benefits</u> Enhanced life chances and employment opportunities ✓ Opportunities to benefit from a wider range of learning opportunities? Opportunities to benefit from a range of key and other learning skills? Raise attainment levels for all pupils and young people including literacy and numeracy competency ✓ Improve school attendance ✓</p> <p><u>Non Quantifiable Benefits</u> Ability to positively contribute to society and the wider community?</p>
	Staff	<p><u>Quantifiable Benefits</u> Increased job satisfaction ✓ (N.B. the group were keen to qualify that this would be a benefit as it would result in less staff sickness, meaning less expenditure on 'supply' teaching resources). Greater opportunities to use a wider range of different learning / teaching styles? Increased opportunities for continuous professional development?</p>

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IO	Stakeholder	Main Benefits Criteria by Stakeholder Group (Reviewed 14/07/16)
		<p><u>Non Quantifiable Benefits</u> Professional support and challenge? Accessing and sharing sector leading practice via Professional Learning Communities ✓ Improved professional credibility and integrity?</p>
	Employers	<p><u>Quantifiable Benefits</u> Improved levels of recruitment, quality and retention of staff ✓ Reduced sickness levels of staff ✓ Sustainable staffing structures - management and support ✓ (N.B. the benefit here is that the future school will be able to operate within budget and not at deficit). This means that there is an opportunity for the Local Authority to use future revenue in a different way)</p> <p><u>Non Quantifiable Benefits</u> Reputational improvement for the County Borough Council ✓ Assured business continuity ✓ Improved opportunities to attract and retain high quality staff ✓</p>
	Wider Community	<p><u>Quantifiable Benefits</u> Community regeneration and sustainability? Reduction in anti-social behaviour and disaffection ✓ Improved community and social health ✓</p> <p><u>Non Quantifiable Benefits</u> Pupils contributing more positively to society ✓ Improved community cohesion? Enhanced local and national reputation of the wider community? Opportunities to create an up-skilled local workforce? Improved community links and facilities ensuring community cohesion ✓ Improved community confidence and sense of belonging?</p>
3.	Learners	<p><u>Quantifiable Benefits</u> More funding available due to redistribution of resources ✓ Wider curricular and non-curricular opportunities ✓</p> <p><u>Non Quantifiable Benefits</u> Greater potential for social interaction through increased number of peer groups and role models?</p>

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IO	Stakeholder	Main Benefits Criteria by Stakeholder Group (Reviewed 14/07/16)
	Staff	<p><u>Quantifiable Benefits</u> Sustainability and retention of staff ✓ Greater staff expertise and specialisms ✓ Greater opportunities to use a wider range of different learning / teaching styles? Increased opportunities for continuous professional development?</p> <p><u>Non Quantifiable Benefits</u> Maintaining long-term job opportunities? More opportunities to facilitate distributed leadership and increased responsibilities? Greater opportunity for flexible working practices e.g. team teaching? Improved professional credibility and integrity?</p>
	Employers	<p><u>Quantifiable Benefits</u> Ability to distribute funds more equitably ✓ Securing long-term opportunities for employment in County Borough?</p> <p><u>Non Quantifiable Benefits</u> Future-proofing of communities? Sustaining local business community? Improved financial management reputation and confidence that public funds are being used efficiently ✓ Sustainable staffing structures - management and support ✓</p>
	Wider Community	<p><u>Quantifiable Benefits</u> Securing long-term opportunities for employment in the community? Community regeneration and sustainability? Reduction in anti-social behaviour and disaffection ✓ Improved community cohesion?</p> <p><u>Non Quantifiable Benefits</u> Confidence in public funds being used efficiently? Future-proofing of communities? Sustaining local business community? Enhanced local and national reputation of the wider community? Improved community links and facilities ensuring community cohesion ✓ Improved community pride and sense of belonging?</p>

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IO	Stakeholder	Main Benefits Criteria by Stakeholder Group (Reviewed 14/07/16)
4.	Learners	<p><u>Quantifiable Benefits</u> More funding due to redistribution of resources✓ Greater learning opportunities to improve pupils' key skills✓ Wider range of curricular and non-curricular opportunities✓</p> <p><u>Non Quantifiable Benefits</u> Greater potential for social interaction through increased number of peer groups and role models? Greater understanding of the importance of sustainable development and environmental issues?</p>
	Staff	<p><u>Quantifiable Benefits</u> Sustainability and retention of staff✓ Greater staff expertise and specialisms✓ Increased opportunities for continuous professional development? Greater opportunities to use a wider range of different learning / teaching styles? Greater understanding of sustainable development and environmental issues in new schools?</p> <p><u>Non Quantifiable Benefits</u> Maintaining long-term job opportunities? More opportunities to facilitate distributed leadership and increased responsibilities? Greater opportunity for flexible working practices e.g. team teaching? Improved professional credibility and integrity?</p>
	Employers	<p><u>Cash Releasing Benefits</u> Reduction in advertising costs for teaching staff✓ Income from community use of facilities✓</p> <p><u>Quantifiable Benefits</u> Ability to distribute funds more equitably✓ Securing long-term opportunities for employment in the community? Sustaining local business community? Greater potential to reinvest revenue and capital✓ Greater ability to target specific need✓ Greater ability to share resources✓ Greater consistency in managing employment issues? Improved borrowing capacity (prudential borrowing) ✓</p>

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IO	Stakeholder	Main Benefits Criteria by Stakeholder Group (Reviewed 14/07/16)
		<p><u>Non Quantifiable Benefits</u> Improved financial management reputation and confidence that public funds are being used efficiently✓ Future-proofing of communities?</p>
	Wider Community	<p><u>Quantifiable Benefits</u> Securing long-term opportunities for employment in the community? Community regeneration and sustainability?</p>
		<p><u>Non Quantifiable Benefits</u> Improved financial management reputation and confidence that public funds are being used efficiently✓ Future-proofing of communities? Sustaining local business community? Enhanced local and national reputation of wider the community? Improved community links and facilities ensuring community cohesion✓ Improved community pride and sense of belonging?</p>
5.	Learners	<p><u>Quantifiable Benefits</u> Improved attendance ✓ Securing positive learning experiences for pupils and families✓ Improved learning outcomes for pupils and families✓ Improved access to learning materials (physical, academic and emotional) ✓ Higher number of positive learning and adult role models? Equality of opportunity to access excellent teaching and learning experience. ?</p>
		<p><u>Non Quantifiable Benefits</u> Better promotion of key skills? Local pride – greater sense of involvement and ownership? Ability to shape local community – pupil/community voice✓ Community school, owned by the community for the community? Raised aspirations across the community?</p>
	Staff	<p><u>Quantifiable Benefits</u> Access to a wider range of teaching materials (state of the art ICT and other emerging technologies) ✓ Increased opportunities for continuous professional development? Improved understanding of community needs and aspirations?</p>

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IO	Stakeholder	Main Benefits Criteria by Stakeholder Group (Reviewed 14/07/16)
		<p><u>Non Quantifiable Benefits</u> Greater engagement with the local community? More opportunities to facilitate distributed leadership and increased responsibilities? Ability to have an impact on community self-confidence and pride? Accessing and sharing sector leading practice via Professional Learning Communities? Improved reputation or standing within the wider community?</p>
	Employers	<p><u>Cash Releasing Benefits</u> Revenue savings released maintain Council's eligibility for capital (prudential) borrowing✓ Income from community use of enhanced facilities✓</p> <p><u>Quantifiable Benefits</u> More efficient use of premises / estate✓ Improved levels of recruitment, quality and retention of staff✓ Reduced sickness levels of staff✓</p> <p><u>Non Quantifiable Benefits</u> Opportunities to create an up-skilled workforce? Assured business continuity? Development of community spirit and identity?</p>
	Wider Community	<p><u>Quantifiable Benefits</u> Community regeneration and sustainability? Securing long-term opportunities for learning / training in the community? Localised access to learning, sporting and cultural opportunities?</p> <p><u>Non Quantifiable Benefits</u> Development of community spirit and identity? Use of the wider community as a learning resource? Enhanced local and national reputation of wider the community?</p>

Page 17 – It is concerning that the source of funding has not been finalised at this stage, particularly as one of the options mentioned is “potential submissions to Welsh Government funding streams”.

LA Response

The Local Authority investment for this project of £12,267,153.00 will be funded through prudential borrowing. The remainder will be funded via Welsh Government 21st Century Schools Programme - £19,080,586.00, as agreed

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by Welsh Government in their approval of the amended Band A SOP (agreement in principle email dated 9th June 2016)

Page 18 – The project constraints and dependencies listed are quite vague. The availability of land is one of the dependencies listed, this seems likely to impact considerably on the options appraisal and would typically be resolved by OBC stage.

LA Response

The individual dependencies (shown in Section 2.2.7. of the business case) were included to reflect the fact that the Council's submission is a combined SOC/OBC and that all dependencies have been considered.

In terms of current dependencies, these are much reduced:

- WG agreement to vary SOP and realign available funding envelope;
- Changes to educational and curricular policies

In terms of the former, Welsh Government has already indicated that it is prepared to vary the SOP and therefore, this dependency has now also been dealt with and will be removed for the FBC.

Is there evidence to support the view that a combined primary and secondary school is beneficial to pupils when compared with separate primary and secondary provision? If so would pupils joining from other primary schools be at a disadvantage and could that potentially lead to increased demand for places at primary level?

LA Response

The establishment of an 'all-through' school supporting 3-16 education is an innovative approach to teaching and learning that seeks to raise levels of attainment, and while the approach is still relatively new in Wales, examples exist elsewhere of how beneficial it can be to pupils, staff, parents and the community.

Creating one all through 3-16 school, should raise attainment through the opportunity for seamless transition, avoiding the possibility of dips in pupil performance often noted at key transition periods, for example between key stages 2 and 3.

Information sharing should become far more efficient in an all through school, ensuring that key information about pupils is passed on to the relevant person at the appropriate time, important for all pupils but particularly so for vulnerable groups.

Informal information sharing should also take place on a regular basis when staff from all stages, share the same building.

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Becoming one all through school would enable a common assessment system to be put in place, which in turn would ensure pupils are accurately tracked through each key stage, that specific targets can be set for progress and increased opportunities can be provided for personalised learning.

Greater opportunities for progressive skill development would be possible across a 3-18 school, ensuring that pupils are able to work across stages when appropriate to their ability, regardless of their age.

This would be of benefit to more able children and to those with additional learning needs, and could provide more flexible learning opportunities.

Standardisation would become more meaningful across all phases with shared understanding of outcomes and levels from Foundation Phase through to Key Stage 4.

This should lead to higher expectations of pupils and a drive to further improve standards.

Pastoral care should be further improved through the development of one philosophy shared across the whole school, ensuring a consistent approach which would be achieved through one school with shared aims and expectations for all children.

In an all through 3-16 school, opportunities would exist for greater flexibility of curriculum design; this would enable the school to match the curriculum to the needs of the pupils, regardless of which key stage the child is working within. Greater opportunities for planning across the stages will ultimately ensure better continuity and cohesion in pupils' learning.

Increased access for pupils to a range of facilities and learning resources would be possible; this could be of particular benefit for children in upper key stage 2 classes for example, to enrich their learning experiences in areas such as art, music, science and design technology, through having access to more specialised equipment and resources available for key stage 3 and 4 pupils.

Additionally, outcomes in the core subjects should also be improved through specialist teaching that would be available across the key stages.

Children with additional learning needs and other vulnerable groups of pupils, should benefit from the extended care and support made possible through one whole school management team, and better provision could be delivered for pupils.

Opportunities exist for greater interactions between staff and pupils within and beyond the key stages.

Better cross phase working should improve staff knowledge and understanding through shared expertise, and pupils of all ages would also

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have opportunities to build relationships with adults and other children across the school, promoting their personal and social development.

Greater access to a wider range of teaching and learning resources should lead to improvements in pupils' age-related skills and confidence.

A single Governing Body, head teacher and senior management team for the school would mean that there would be one vision and ethos, strengthening the overall purpose and aims of the school as a whole across the north and south campuses.

Joint management and implementation of common systems would ensure greater continuity for pupils as they move through the school, and could ensure more efficient use of financial and human resources.

Staff would have greater opportunities for continuing professional development, through shared training events, and the possibilities for cross phase working.

A 3-16 school would enable better continuity for multi -agency involvement, easing communication and providing opportunities for improved interaction with the school for parents, carers and families.

Community links would be sustained for a longer period of time as the children will be part of one school for the whole of their schooling, and relationships could be further developed and enhanced as the children move through the different key stages.

Children attending Year 7 from other primary schools could be at a disadvantage if transition from Y6 to Y7 is not carefully thought out and managed, with the aim of minimising potential areas of difficulty.

Evidence suggests that while it is harder to achieve some of the benefits, many can still be achieved with good partnership working between the partner schools.

It is a possibility that at some point in the future all the partner primary schools could become 'satellite schools' adopting the same ethos and approaches as the 3-16 school, however the 3-16 school will first need to be fully established and demonstrating improved outcomes for pupils consistently.

The proposal may well lead to increased demand for primary places at the 3-16 school, as would be the case, no doubt, were the proposal to be for a new build 3-11 school – new schools attract parental/pupil interest.

It is for the Council, as the admission authority, to manage the demand for pupil places by means of its admission criteria.

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The primary phase element of the 3-16 school is designed to provide for the anticipated numbers from within the designated catchment area for the 3-11 element of the new school.

In forecasting this number, account has been taken of the 'new build' school effect. 255 pupils have been identified as living in the catchment area served by Groes Primary School.

As such, sufficient places are being made available for anticipated pupils from the catchment area whose parents would otherwise have indicated a preference for a neighbouring school.

In relation to this proposal, it is the case that neighbouring primary schools currently have no surplus capacity.

Page 24 – Service solution – a 'do nothing' option of continuing with the status quo should be included as a benchmark, this could include backlog maintenance if needed.

LA Response

Under Section 3.4 (page 24) of the business case, the options stated do, in fact cover this service solution. The Council acknowledges that this could have been detailed more clearly.

The Do Minimum option (which states 'refurbish existing sites') does in fact cover backlog maintenance for the school sites involved. This is more clearly articulated under Section 3.8 (Short List), specifically under Option 1 of the Service Solution, which states 'Do Minimum – Refurbish school buildings and complete all backlog maintenance).

Throughout the remainder of the document, this option has been used as a comparator.

The do minimum option includes refurbishment of the primary school site which does not seem necessary given that it is condition B. It is also not clear why the long list does not include the following options:

- Refurbishment of Dyffryn Upper and Lower schools on their existing sites which could include reconfiguration to reduce surplus places, no change to Groes primary school

LA Response

As detailed in the response above, the Do Minimum option is not just refurbishment, but is, in fact, mainly the completion of backlog maintenance for all schools.

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It is widely recognised that there are significant challenges in managing a split site school.

Dyffryn School consists of two sites situated two miles apart.

The Lower School houses Years 7 and 8 and the Upper School Years 9, 10 and 11.

Set out below are the educational and practical issues associated with such an option received from the current Headteacher of Dyffryn School:

- Staff are required to teach on both sites.
- The distance between the sites means that much time during the working day is spent travelling.
- All staff effectively have to operate from two bases and so managing resources is difficult.
- There is also duplication of resources and this is inefficient and expensive.
- Specialist teachers are not always available on the site they are required and this produces inefficiencies in the timetable.
- School performance is adversely affected because children do not receive the same attention from staff as they would if they were on one site, nor do they have access to the same resources.
- It has been shown elsewhere that performance is improved dramatically when split schools have been moved to one site.
- Constraints upon the timetable mean that we are not able to group pupils as we would wish, e.g. it is not possible to set Maths throughout the school. There is no doubt this has an adverse effect upon results. A similar situation occurs for other subjects.
- Another consequence is the difficulty of avoiding split classes. Ensuring that classes are taught one subject by one teacher is expensive.
- To be effective, it is important that staff should have experience of the full age and ability range, which means all staff have to travel. This is tiring and also has an adverse effect on performance.
- Staff/pupil relationships are also affected by the split site since typically staff are only able to see pupils during lesson time. There is a great deal of work which occurs outside lessons whether in clubs and societies or informally. However, such activities are very much

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constrained because staff are nearly always travelling at break and lunch times. This also has an adverse effect on results.

- Similarly, pastoral work is limited and so children do not always receive the level of support they would in a school on one site.
- There is a shortage of staff to supervise pupils at breaktime, again because staff are generally travelling.
- Specialised rooms are maintained where they are essential, e.g. in Art, Science and Technology. All other subjects have to share rooms which mean they are not resourced as we would like nor are we able to mount proper displays for all subjects being taught. Again, this places increased demands upon staff and also affects results.
- The role of the form tutor is also diminished because of the demands of travelling. Although they see their pupils every morning for registration, this is sometimes the only time they have with them.
- There is no separate afternoon registration because staff are often not on the site with their year group for registration. Again, this affects performance.
- No on site playing fields
- Restricted outdoor play areas
- Duplication of resources
- Efficiencies of scale not realised

This option was therefore **discounted**.

- Refurbishment of Dyffryn Upper school and extension (if needed) to accommodate Dyffryn Lower school with sale of the lower school site

LA Response

This option was originally considered prior to Welsh Government's approval of the change to SOP, within the original cost envelope. This option was considered prior to the agreed increased funding, when the Council and Welsh Government were unable to fund a complete rebuild.

The funding short-fall was compounded because any retained/refurbished buildings would also have needed significant remodelling to bring up to BB standard. This was unaffordable (and did not offer best value for money) and subsequently would have been abortive if future funding became available to complete the whole site re-development.

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This option was therefore **discounted**.

- Refurbishment of Dyffryn Lower school and extension (if needed) to accommodate Dyffryn Upper school with sale of upper school site

LA Response

This option was considered initially, but was disregarded following a desk-top survey that identified that the lower school site was too small to accommodate a building foot-print of circa 11,300M².

Additionally, under this option there would be no on-site sports fields, due to the restricted site. Pupils would therefore have to be transported to a number of different off-site facilities.

This option was therefore **discounted**.

- Extension to Groes Primary school (which is condition B and hence not a prime candidate for demolition) to accommodate secondary provision with sale of the existing Dyffryn sites

LA Response

This option was originally considered, but subsequently **discounted** as the primary element of the all-through provision would only account for approximately 10% of the build area. To accommodate the existing Groes building into a much larger new build would pose difficulties beyond the constructional aspects that would nullify any financial benefit that could be realised.

The main issue being continuity of teaching throughout the construction phase, where the Council would have to consider the temporary relocation of the Groes contingent to facilitate the construction works. Furthermore, the spatial arrangement of the existing single storey primary school is inconsistent with the room area requirements and pedagogy guidance as laid out in the BB99. There is also the backlog maintenance and the remaining life span of the Clasp structure to consider.

An elevated view of the Dyffryn Upper and Groes sites is shown below, to illustrate this point.

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The site is shared with Dyffryn (upper) school which would be required in totality and as such, there would be no additional capital receipt accrued from the sale of the Dyffryn (upper site) or part thereof.



These options may be unsuitable for various reasons but that should be explored in the shortlisting process. Some of the additional objectives such as single management structures, closer working between staff etc. can still be pursued across split sites. Given that the proposal is to combine primary and secondary provision and there is considerable surplus capacity in both, an option could also be explored to close the lower school and move it to the primary school site, which has nearly 28% surplus capacity, is in condition B and appears to be more or less on the same site as the upper school, and refurbish the upper school as needed.

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For an OBC it would be helpful to have more detailed information on the economic analysis, particularly as this proposal involves three separate schools and options include closing and rebuilding sites in different configurations. For comparison of the options it would be useful to know the running costs of each site, how much sales revenue is anticipated from the sale of each site etc.

LA Response

Cost category	Groes Primary	Dyffryn School	Additional notional costs (To reflect potential to house an additional 220 Secondary pupils)*	Totals
Building running costs	£139,572	£894,995	£328,089	£1,362,656
Staffing Costs	£1,449,198	£3,316,051	£807,418	£5,572,667

****To reflect next phase of Secondary school reorganisation in the east of the County Borough (subject to consultation).***

The total figures stated above reflect the items in lines 33 and 34 of the economic appraisal spreadsheet (Options 1 and 2 only, as Option 3 is estimated revenue based on a new all-through school).

Separately, there is only one entry to reflect the potential sale of Dyffryn lower school site – under Options 2 & 3 within the economic appraisal. This is estimated at £100k, to fall in year 7, within line 18 of the economic spreadsheet.

Additionally, as mentioned in a previous addendum response, and subject to the availability of capital funding (future 21st Century School Investment Bands), the Dyffryn Lower site may be retained to re-locate Central Primary school, which is currently a split-site school. In that instance the infant and junior department of the school will be brought together in a new build on a single site.

Therefore, there is no change to the economic appraisal spreadsheet.

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Options appraisal spreadsheet

The appraisal period should reflect the type of intervention – i.e. typically 30 years for refurbishment and 60 years for new builds. This will impact on the NPC and EAC calculations which will therefore need to be reviewed.

The sale of the school sites should be listed as transaction in row 18 of the spreadsheet and treated separately to the revenue savings from reducing surplus places.

LA Response

There is a clear reason that all options have been appraised over the same appraisal period (in this case 40 years initially and, 60 years as a result of responding to this addendum).

In terms of different periods, this approach would not allow the Local Authority to understand fully the revenue based implications/costs associated with each options – therefore there would be no comparison on a like for like basis.

For example, a project with 60 years' revenue cost at £1M per annum will not compare favourably (in economic terms) with a project that has 30 years' revenue costs at £1.5M per annum. With the extrapolated view, and a consistent 60-year appraisal period, the authority is able to compare 'apples with apples' and understand the true cost of each potential scheme (option).

The only way that this could work appropriately would be to take the life of the refurbished premises as 30 years and then calculate any additional capital or revenue costs from that point forward – which would extremely difficult to forecast so far ahead of time. However, the period of comparison would still be 60 years.

With this approach, there is no change to the economic appraisal spreadsheet.

3. Financial Case: Question/issue - Capital Funding

More detail is required around the how the LA investment is funded, showing a breakdown of the amounts raised through prudential borrowing, cash reserves & capital receipts, including section 106 monies.

We require a profile of how the investment in the project will occur across the years, showing the split between LA/WG

Authority to provide a revised matrix showing the effect of changes to all projects and an Information Proforma.

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LA Response

A revised matrix has previously been provided to WG but for the avoidance of doubt it is reproduced here.

The investment profile for the project across the years and showing the LA/WG split is contained within the spreadsheet.



updated June 2016
DHJ version.xlsx

The Local Authority investment for this project of £12,267,153.00 will be funded through prudential borrowing.

Please find below the Project Information Proforma



Ysgol Newydd
(Margam) - Project In