

Minor Works - Business Case

NON-CONTROLLED

Property Name:	St Joseph's P.S Strangford		
Property Address:	31 DOWNPATRICK ROAD STRANGFORD DOWN BT30 7LZ		
Project Description:	Additional Accommodation including a Principals Office		
Date of Feasibility Report:	18/04/24	EA Project Manager:	
EA / Manhattan Ref. No:	40121521	DE Ref. No.:	403-3005/10B

EXECUTIVE SUMMARY

St Joseph's Primary School Strangford is a catholic maintained school catering for primary school children from p1 to p7 in the small, rural area of Strangford and Klicief parish. The school has an approved admissions of 13 and a current approved enrolment of 91.

St Joseph's PS, Strangford submitted a minor works application as the principal has no office and there is a need for an office to be created solely for use by the principal. The school's enrolment has grown year on year and the principal has advised that it has become increasingly more difficult to find a space to work without major disruption. They further stated that there is a clear need for an office to carry out the principal's role and to have all documents to hand in a secure area.

Following scoping visits and discussions with DE it was approved that the rear modular unit could be removed, 2 new classrooms provided and internal space to be reconfigured to suit the school's needs.

Options considered within this Business Case are:

- Option 1 – Do nothing.
- Option 2 – Do minimum – Replacement of the failing mobile with modular x2 classrooms (Double Modular Unit) and reconfiguration of internal space for Principals office and multi-purpose space.
- Option 3 - Replacement of the failing mobile with x2 New Build Standalone modular classrooms and reconfiguration of internal space for Principals office and multi-purpose space.
- Option 4- Replacement of double modular with a traditional build extension and reconfiguration of internal space for Principals office and multi-purpose space & removal of existing mobile.

Following a financial assessment of the report, together with an assessment of non-monetary benefits and project risks Option 2 has become the recommended option going forward.

Option 2 meets the project objectives. It provides necessary modifications and/or enhancements to the building environment to meet the shortfalls identified by the school, it improves staff and pupil morale, and it improves the standard of accommodation for occupants.

Option 2 will allow for the removal of the existing condemned modular and will replace it with a double modular including 2 classrooms. This option will also include the following works internally in the school: a principal's office, additional staff toilets, reprographics room and 2 multipurpose stores.

Option 2 is not the cheapest option however it is deemed to be the best value for money scheme from all the options that have been put forward for consideration. It ranks the highest in non-monetary factors and risk as you will see below.

Recommended Option:	Option 2 – Do minimum – Replacement of the failing mobile with modular x2 classrooms (Double Modular Unit) and reconfiguration of internal space for Principals office and multi-purpose space.		
	(£)	VAT	TOTAL
Total Option Costs:	£664,300.07	£132,043.61	£796,343.68
EA Business Case Development Fee:	£1,500.00	£300.00	£1,800.00
Total Business Case Cost:			£798,143.68
Is a Privacy Impact Assessment Required as part of this project?			No

APPROVALS

Business Case Officer	
Name:	
Signed:	
Date:	14/05/24

AMS Locality Manager (on behalf of Head of Asset Management Service)	
Name:	
Signed:	
Date:	28/05/2024

Estate Operations Officer (DE)	
Name:	
Signed:	
Date:	29/05/24

Grade 5 (DE)	
Name:	Stephen Creagh
Signed:	
Date:	30/5/24
Confirmation – Budget Availability	

DE Internal Use: EA Nominated Officer	
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PRIVACY IMPACT ASSESSMENT (PIA)	
PRIVACY IMPACT ASSESSMENT (PIA) - The introduction of General Data Protection Regulation (GDPR) in May 2018 requires the mandatory use of PIA for all new projects, programmes or policies which involve the processing of personal or sensitive data, and for any changes to current projects/programmes/policies which involve the process of personal or sensitive data. <u>To decide if a PIA is necessary, please answer the following screening questions.</u> If the answer to any of these is YES, please refer to Departmental Guidance - Conducting a Data Protection Impact Assessment.	
<u>Privacy Impact Assessment - Screening Question:</u>	<u>Y/N</u>
Will the project involve the collection of new information about individuals?	N
Will the project compel individuals to provide information about themselves?	N
Will information about individuals be disclosed to organisations or people who have not previously had routine access to the information?	N
Are you using information about individuals for a purpose it is not currently used for, or in a way it is not currently used?	N
Does the project involve you using new technology which might be perceived as being privacy intrusive? For example, the use of biometrics or facial recognition.	N
Will the project result in you making decisions or taking action against individuals in ways which can have a significant impact on them?	N
Is the information about individuals of a kind particularly likely to raise privacy concerns or expectations? For example, health records, criminal records, or other information that people would consider to be particularly private.	N
Will the project require you to contact individuals in ways which they might find intrusive?	N

If a PIA is required a template is available at:

<https://sharepoint.eani.org.uk/resources/thinkdata/Pages/default.aspx>

1. Strategic Case

Description of Minor Works Request

An unavoidable minor works application was sent to the Education Authority by the Department of Education on behalf of St Joseph's Primary School. This application was a request for additional accommodation in order to facilitate a principal's office.

Currently the Principal cannot efficiently carry out their duties with no designated workspace. There are a host of concerns including GDPR, confidentiality, child protection (No privacy to deal with incidents of a sensitive nature). Essential principal meetings are being hosted in the staff room leaving staff with no access to it on their break or lunch which is not ideal. The small office which does exist is used by the school secretary, doubles up as a reprographics room, used by all teaching and non-teaching staff, which makes it a general office. When the principal is required to meet visitors to the school, they have to look around the building to find a suitable and quiet space. The library which is used daily for reading and SEN is being used as Principal office space. There is no privacy, no phone line and a very poor Wi-Fi connection with no data point, the principal has stated she is currently using a pupil size desk and chair and it is causing discomfort to her back.

In March 2022. Discussions took place between AMS, the School and DE regarding the scope of the project. In January 2023, DE asked if an existing modular classroom could be surveyed with the possibility of increasing the scope of the project to include works to this existing mobile. A condition surveyed was undertaken and found that the modular unit should be condemned. DE confirmed that the scope of the project has now increased to include the replacement of existing mobile with 2 new classrooms and reconfiguration of internal space for a principal's office and multi-purpose room.

There is a clear need for a secure office for the principal to handle sensitive documentation and deal with confidential matters.

An audit of accommodation was completed, and the school is non-compliant with the DE handbook. To complete the MW request for the principal's office it has been agreed by DE that additional classroom space is required as well as disposal of a condemned mobile unit. These proposed works are to meet the immediate needs of the school and ease pressures currently being felt by the principal and staff.

Following consultation with the Department of Education, the following was agreed:

- Removal of the condemned mobile unit on site.
- A double modular to provide x2 additional classrooms.
- Reconstruction of the internal school layout to provide:
 1. a principal's office,
 2. additional staff toilets,
 3. reprographics room and
 4. x2 multipurpose stores

Rationale / Need (including its relevance to NI Government or Departmental strategic aims and policy objectives)

This section of the Business Case considers the legislative environment, policy, and strategies under which minor works take place.

Northern Ireland Government Context

The Northern Ireland Executive Programme for Government 2021:	The Programme for Government is the governing document for actions taken across NI by Civil and Public Service organisations. The 2021 PFG is currently under consultation and is intended to build upon outcomes-based approach that has defined strategic planning across the public sector since 2016, and reflect the messages contained in New Decade New Approach. The PFG 2021 is currently under development, but it is expected that it will reflect or develop further outcomes from the Outcomes Delivery Plan 2018/19 which included Outcome 12, which is particularly relevant to Minor Works projects: Outcome 12: We give our children and young people the best start in life. • Indicator 11: Improve educational attainment. • Improve the quality of education.
Investment Strategy – The Northern Ireland Executive: Priorities and Budget 2011-2021	The Investment Strategy for Northern Ireland 2011-2021 identifies a total capital investment in schools of £512m between 2011/12 - 2014/15 and £1,232m between 2015/16 - 2020-21. Investment that improves the educational environment and that delivers efficiency across the wider schools estate will protect the future prospects for all of our children.
Lifetime Opportunities: Government's Anti-Poverty and Social Inclusion Strategy for Northern Ireland 2006	The number of children in NI living in absolute poverty in 2013/14 was approximately 112,000, representing an increase on the 2012/13 number. Actions in education should contribute to the reduction of poverty.
The Child Poverty Strategy	The Executive's Child Poverty Strategy, published in March 2016, sets out the vision to eradicate child poverty in the future. The aims of the strategy are to: reduce the number of children in poverty; and reduce the impact of living in poverty on children (their lives and life chances).
Promoting Equality: A central tenet of the Good Friday agreement is Section 75 and Schedule 9 of the Northern Ireland Act 1998.	Children should be educated in accordance with the wishes of their parents in so far as this is compatible with the provision of efficient instruction and the avoidance of unreasonable public expenditure.
Regional Development Strategy 2035	Maintenance of a well-developed network of schools and colleges, which in turn helps to sustain and strengthen local communities, including rural communities

Rural Needs Act (NI) 2016	Ensuring policies, plans and strategies are assessed so that there is no differential impact on rural areas and, where appropriate, adjustments are made to take account of particular rural circumstances'
Department of Education Context	
DE Business Plan 2023/24	The business plan sets out the following strategic priorities: 1. Championing the needs and aspirations of all our children and young people and the positive impact of education. 2. Helping all our children and young people by supporting their well-being and learning. 3. Inspiring all our children and young people to make a positive contribution to society. 4. Meeting the learning needs of our children and young people and developing their knowledge and skills, enabling them to fulfil their potential 5. Delivering an effective, child-first, collaborative and high-quality education system. Specifically within priority 5 the action D1 is to prioritise the capital works programme. However the provision of modern fit for modern fit for purpose school accommodation and sports facilities will impact on the other priorities as well.
DE Corporate Vision (2021/22)	"A system that is recognised internationally for the quality of its teaching and learning, for the achievements of its young people and for a holistic approach to education."
Special Educational Needs and Disability Order 2005	Duty on schools to make reasonable adjustments where appropriate for pupils with disabilities; and for schools to plan to continually improve the accessibility of the school building.
Draft Early Years (0-6) Strategy Consultation On 25 June 2010	Ensure better outcomes for children by improving the provision and quality of services to the youngest children
'Learning to Learn' – A Framework for Early Years Education and Learning October 2013	The policy aims to raise standards for all, close the performance gap and increase access and equality. This will be enabled through developing the education work force, improving the learning environment and transforming the governance and management of education.
The Schools for the Future: A Policy for Sustainable Schools	Six sustainability criteria and indicators are detailed. These are: Quality Educational Experience; Stable Enrolment Trends; Sound Financial Position; Strong Leadership and Management; Accessibility; and Strong links with the Community.
Every School a Good School: A Policy for School Improvement 2009	The focus of the policy is to improve outcomes for pupils and young people. A key element of the policy is that schools themselves, utilising rigorous self-evaluation, are best placed to identify areas of improvement and drive changes that can bring about better outcomes for all their pupils

Planning for Sustainable Provision: Strategic Area Plan 2022-27 – Primary and Post Primary Schools	In a statement to the Assembly on 9 August 2021, the Minister for Education, Michelle McIlveen MLA, outlined her priorities for Area Planning. The Minister stated that as we look forward to the next Area Plan, due to commence in September 2022, the principal aim continues to give our children and young people the best start in life and to offer every learner an opportunity to achieve their full potential at each stage of development. The new Area Plan will help deliver the Department of Education's commitment to the New Decade New Approach suite of actions that will contribute to addressing pressures in the Education system and delivery quick results in terms of improved efficiency and effectiveness of the system. The Minister stated that the Area Planning priorities set out in 2016 need restated for the next area plan and she has tasked the Education Authority with incorporating these priorities into the development and publication of the next Area Plan, together with the first of its two year Operational Plans by June 2022 to take effect from September 2022. The new Area Plan, Planning for Sustainable Provision: Strategic Area Plan 2022-27, was published on 29 June 2022 and is the second regional Strategic Area Plan for Northern Ireland. This Plan sets the strategic direction of Area Planning for the next five years with Operational Plans being devised to outline the practical workings of Area Planning and enacting changes to the current school provision. Operational Plan 1: 2022-24 identifies actions to be undertaken within the primary and post-primary sectors over the next two academic years, Fairview Primary School, is not included within this Plan.
Every CHILD - Department's Corporate Plan for the period 2023-28	Every CHILD is the Department's Corporate Plan for the period 2023-28. It provides the Department and broader education sector with a clear strategic focus in the medium term, outlining its priorities for improving the lives of all children and young people to achieve its Vision of "Every child and young person is happy, learning and succeeding". Every CHILD is structured around five Strategic Priorities, derived through stakeholder engagement and designed to pursue the achievement of the Vision, through a focus on meeting the needs of all our children and young people as best we can and to ensure that we are appropriately structured to do so. Every CHILD will provide a strategic framework for actions that focus on delivering successful outcomes for children and young people.

Strategic Context

The Department of Education (DE) and the Education Authority (EA) take a strategic approach to minor capital works so as to ensure the most effective utilisation of the limited capital budget across the estate. All proposed projects must support at least one of the current Ministerial Priorities for capital investment:

Ministerial Priority (please tick box)	x	Priority 1:	Minor works schemes that meet inescapable statutory requirements such as health & safety, fire protection and statutory obligations under the Disability Discrimination Act
		Priority 2:	Essential minor works to ensure the integrity and suitability of the estate
		Priority 3:	Curriculum based Minor Works schemes that would meet currently unmet needs in schools

DE and the EA have a duty to promote and co-ordinate the planning of the effective provision of the educational estate and strive, within the finance made available, to improve its condition and suitability. As the funding is limited it is necessary to prioritise all applications for minor works and, in order to do so, all applications from schools are evaluated, to determine the greatest need.

In October 2017, the EA and the DE issued a joint call for minor works in an attempt to streamline processes, ensure equality of opportunity and improve efficiency. In addition, it is accepted that unavoidable Minor Works applications are required outside the call and minor works requested to implement an approved Development Proposal need to also be progressed.

Assessed Rationale and Need for project.

This section of the Business Case must provide the following information:

- The existing provision – what is the current situation at the school (please include a brief introduction regarding the school, its enrolment, and admissions numbers for the last five years and what is current accommodation is).
- The current business need – please state what the accommodation needs are at the school currently. This should include any deficiencies in accommodation, need for additional accommodation or any other relevant issues.
- Potential Scope of Works – complete the table, using the information from the previous two sub-sections, to identify what the essential, desirable, and optional works at the school are.

Existing Provision:

St Joseph's Primary School has a site of approx. 3,042 m² located off Downpatrick Road. The school is situated across one main building comprising of a 5-classroom school, with two single modular units on site. The school's enrolment has grown year on year and the principal has advised that it has become increasingly more difficult to find a space to work without major disruption. A condition survey of the one of the existing modulars states that "the building was built in the 1970s and has had subsequent refurbishments but is no longer in a financially viable condition for restoration and ideally requires replacing with a new structure".

Enrolment Profile

Approved Enrolment No: 91

Actual Enrolment No: 87

Approved Admissions No: 13

Enrolment Profile	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Year 1	11	8	11	8	14	12	10	10
Year 2	9	11	7	12	11	15	11	10
Year 3	8	11	12	7	13	13	12	12
Year 4	8	8	12	13	9	13	12	14
Year 5	9	10	9	10	15	9	14	12

Year 6	7	10	13	10	11	14	10	18
Year 7	4	7	11	12	10	11	15	11
Total pupils	56	65	75	72	83	86	85	87

Pupils at SEN stage 1 to 4	11	17	11	8	7	15	6	N/A
Pupils at SEN stage 5	4 or less	4 or less	4 or less	6	5	n/a	6	N/A
Total pupils	15	21	15	14	12	15	12	

Existing Site: The Spatial Ni map below shows an ariel view of the school site:



- The school extends to an area of approx. 3,042m² inclusive of hard and grassed play areas.
- The school is situated within the rural village of Strangford in County Down.
- The site has one main accessible entrance for both vehicles and pedestrians. This entrance is located along the eastern boundary of the site and is located off the Downpatrick Road.
- There is one existing modular classroom located in the southwest corner of the site. This is often used by the principle for a workspace when not being used for teaching and extra-curricular activities, i.e. music, art.
- The topography of the site slopes from south to north with the school being situated at an elevated position in comparison to the main pedestrian entrance to the site.
- There is some existing car parking provision on site with the remaining of staff and visitors availing of on street parking, outside of the school site.
- There is limited hard and soft play area within the school site which was needs to be taken into consideration when reviewing the proposed options.

Business Need:

The school currently has 4 classrooms, all of which are approximately 50m² or under. The school has no multi-purpose areas, no Principal's office, no bookstore, no mat store, no adult chair store, no stage storage, no consumables store, no pupil changing room, no hygiene room and no Computer Hub room. There is also a shortage in storage space as only 1 of the classrooms has an undersized store.

Please see an accommodation audit of the school below;

Existing accommodation			Building Handbook Schedule (91 - 120)		Diff No	Diff m ²	Diff %
Description of Accommodation	Area m ²	No	Description of Accommodation	Area m ²			
Classroom Room No 08 P1/2 (Rm 08)	45.26 m ²	1	Classroom 1	60 m ²	0	-14.74	-25%
Classroom Room No 09 P4/5 (Rm 09)	36.22 m ²	1	Classroom 2	60 m ²	0	-23.78	-40%
Classroom Room No 10 P3 (Rm 10)	36.10 m ²	1	Classroom 3	60 m ²	0	-23.90	-40%
Classroom Room No 17 (mobile) P6/7 (Rm 17)	52.94 m ²	1	Classroom 4	60 m ²	0	-7.06	-12%
Total Classrooms	170.52 m²		Total Recommended Classrooms	240 m²			
Resource Areas Library/SEN Room/ Music (Rm 21) (mobile)	40.58 m ²	1	Resource Areas 1 @ 40m2 each	40 m ²	0	0.58	1%
Gym/Dining (Rm 04)	58.75 m ²	1	Multi-purpose hall	160 m ²	0	-101.25	-63%
Multi Purpose room	0.00 m ²	1	Multi-Purpose Room	15 m ²	-1	-15.00	-100%
Multi Purpose room	0.00 m ²	1	Multi-Purpose Room	15 m ²	-1	-15.00	-100%
Staffroom (Rm 06)	16.66 m ²	1	Staffroom	30 m ²	0	-13.34	-44%
Principal's Office	0.00 m ²	1	Principal's Office	15 m ²	-1	-15.00	-100%
General Office (Rm 02)	10.86 m ²	1	General Office	15 m ²	0	-4.14	-28%
Classroom Stores (Rm 18)	2.13 m ²	4	Classroom Store (4)	20 m ²	-3	-17.87	-89%
Book Store	0.00 m ²	1	Resource Store (1)	5 m ²	-1	-5.00	-100%
PE Store (Rm 05)	3.96 m ²	1	PE Equip Store	15 m ²	0	-11.04	-74%
Mat Store	0.00 m ²	1	Mat Store	10 m ²	-1	-10.00	-100%
Adult Chair Store	0.00 m ²	1	Adult Chair Store	10 m ²	-1	-10.00	-100%
Stage Store	0.00 m ²	1	Stage Store	10 m ²	-1	-10.00	-100%
External Stores (Rm 23)	6.75 m ²	1	External Play Store	15 m ²	0	-8.25	-55%
Cleaner's Store (Rm 11)	9.84 m ²	1	Cleaner's Store	9 m ²	0	0.84	9%
Consumables Store	0.00 m ²	1	Consumables Store	6 m ²	-1	-6.00	-100%
Toilets and cloakroom (Rms 1, 12, 13, 19, 22)	49.85 m ²	4	Class Toilets & Cloak space (4 at 15)	60 m ²	1	-10.15	-17%
Pupil Changing Room at MP Hall	0.00 m ²	2	Pupil Changing Room at MP Hall	24 m ²	-2	-24.00	-100%
Hygiene Room	0.00 m ²	1	Hygiene Room	13 m ²	-1	-13.00	-100%
Staff Toilets (Rm 3)	3.27 m ²	2	Staff Toilets	12 m ²	-1	-8.73	-73%
Comms Room	0.00 m ²	1	Computer Hub Room	5 m ²	-1	-5.00	-100%
Total Educational Area	373.17 m²	33	Total Recommended Educational Area	744 m²	-15	-370.83	-50%
Circulation areas etc	26.36 m ²		Total recommended circulation space etc	140 m ²		-113.64	-81%
Total LIA	399.53 m²		Total LIA	884 m²		-484.47	-55%

The total LIA is 399.53m² when compared to the DE recommended Building Handbook of 884 m² the school is under provided by 484.47 m².

When compared to the DE Building Handbook for 4 classroom school the main areas of under provision in accommodation is as follows: -

- 2no 15m² multipurpose rooms
- 1no 15m² Principal's Office
- 1no 5m² Resource store
- 3no 10m² and 1no 6m² stores
- 2no 24m² Pupil changing rooms at Multipurpose Hall
- 1no 13m² Hygiene room
- 1no 5m² Computer hub room

The Minor works application was specific to the under provision of a Principal's Office. The accommodation analysis shows that the principal has no office.

As a result of this under provision there are concerns over the principal's wellbeing as they cannot efficiently carry out their duties as they have no designated workspace. There are concerns regarding GDPR, Confidentiality and Child protection. On Principal release days there is no office for the principal's sole use. There is nowhere to store relevant and sensitive data, this makes the principal's job very difficult. At present the principal is using the library as an office, which is used for daily reading and SEN. Whilst using the library there is no privacy, no phone line and a very poor Wi-Fi connection with no data point. The principal is also using a pupil sized desk and chair which results in lower back pain and discomfort as they sit for prolonged periods of time whilst using the computer. The principal has stated that if they require to meet visitors to the school they are forced to try and find a suitable available quiet space.

The School's Board of Governors support the principal's application as it will have a huge positive impact on their working day and ensure effective and efficient use of Principal release days.

The school is significantly under provided for in many areas. This request however is specific to the under provision of a principal's office which is clear in the attached accommodation analysis. This under provision is having a detrimental effect on the principal's ability to effectively carry out their duties.

The total LIA is 399.53m² when compared to the DE recommended Building Handbook of 884 m² the school is under provided by 484.47 m². The limited internal area means that there isn't any opportunity to reconfigure any existing space within the school to facilitate a Principal's Office.

Whilst scoping the principal's accommodation, DE requested the need to replace the one of the existing modulares. A building survey was carried out by an external surveyor company in May 2023 and the findings are summarised below:

The building was built in the 1970s and has had subsequent refurbishments but is no longer in a financially viable condition for restoration and ideally requires replacing with a new structure. It was noted that structural defects were observed in the externally visible part of the substructure. The internal area below the building was enclosed and not accessible, the condition of the supports /joists for the underside of the floor could not be inspected. The building is old and has insufficient insulation and ventilation; there is damp present and signs of black mould. There are birds nesting inside the building and there was a previous rat infestation.

The survey reported suggested ' If the building where to be retained there are a number of areas where the EA should limit liability for future repair such as cracks in substructure walls, rotting wood in rendered external walls, and water ingress from roof rainwater outlets. Other notable areas of concern are high moisture content readings in exposed floor timbers, localised movement in floor adjacent fire exit (possible rot in floor timbers).'

The architectural drawing displays four elevations of a building facade, each with specific annotations regarding structural details, materials, and observed conditions.

- South corner:** Annotations include "Bottom level of Fascia 11.829", "Outlet blocked", "Gap between membrane and edging visible (Fig 105.02/106)", "Render peeling", "Partially replaced wood skirting", "Downpipe", "Hole in Render (Fig 112.09)", "Crack in wall", "Windows replaced between 5-15 years", "Substructure", "Hole in Render Rotting wood visible (Fig 112.10)", "Render peeling Exposed rotting wood (Fig 112.11)", "Carpet", "Downpipe", "Hole in Render Rotting wood visible (Fig 112.03)", "Substructure Crack in wall (Fig 110.02)", "Hole in roof outlet on membrane (Fig 106.03)", "Render peeling Rotting wood underneath (Fig 112.04)", "Bottom of Fascia".
- West corner:** Annotations include "Superstructure: fascia 120mm lower than entrance door Fascia level Bottom of Fascia 11.749", "No adjustment in roof of Gable between members 105.01/105.02", "Plant peeling Wound exposed (Fig 115)", "Movement in floor possible at below (Fig 108)", "Smoke alarm broken (Fig 101)", "Vinyl Coated Floor", "Covered Stationary Not working at time of survey", "Point on fascia peeling Rotting wood exposed (Fig 112.06)", "Paint on fascia peeling Wood exposed (Fig 103.05)", "Gap between window handles - 12mm", "Point on fascia peeling Wood exposed (Fig 110.04)", "Northwest Elevation", "Bottom level of Fascia 11.852".
- Southwest Elevation:** Annotations include "Finished Floor Level 9.534", "Covered Stationary Not working at time of survey", "Heavy corrosion cabinet hinges indication of excessive moisture (Fig 102)", "Mould on ceiling", "Heavily corroded cabinet hinges indication of excessive moisture (Fig 102)", "Vinyl floor peeling (Fig 115)", "Smoke alarm broken (Fig 101)", "Covered Stationary Not working at time of survey", "Windows replaced between 5-15 years condensation visible in double glazing (Fig 113)", "Carpet", "Downpipe", "Hole in Render Rotting wood visible (Fig 112.03)", "Substructure Crack in wall (Fig 110.02)", "Hole in roof outlet on membrane (Fig 106.03)", "Render peeling Rotting wood underneath (Fig 112.04)", "Bottom of Fascia", "NORTHEAST ELEVATION", "North corner".
- Northwest Elevation:** Annotations include "Finished Floor Level 9.624", "Downpipe", "Hole in Render Rotting wood visible (Fig 112.05)", "Substructure Crack + hole in (Fig 110.05) - concrete Substructure Crack in wall (Fig 110.09)", "Bottom level of Fascia 11.852".



Potential Scope:

Project Element	Essential	Desirable	Optional	Reasoning
Replacement of condemned mobile.	✓			This will address the condemned modular unit on site and address the health and safety concerns of pupils and staff.
Reconfiguration of internal space for Principals office, storage and multi-purpose space.	✓			This will ensure the school is compliant with the DE handbook and address the principals' concerns with a lack of a secure office.

To complete, list the relevant project elements (such as “Modular Accommodation” or “Electrical Rewiring”), then mark each element as either Essential (it is critical in order to meet business need), Desirable (additional changes which the project may be able to justify on a VFM basis) and Optional (the ‘possible’ changes which the project can potentially justify on a marginal low cost and affordability basis).

Project Objectives

In order to assist with the appraisal of options, appraisers should identify and provide a description of the following Objectives and associated Outcomes.

In developing objectives, these should be as ‘SMART’ as possible – i.e. Specific, Measurable, Achievable, Realistic and Time-Dependent.

#	Objective	Specific actions to achieve objective	How will the customer be better off? (i.e. Outcomes)
1.	Provide necessary modifications or enhancements to the building environment to meet the shortfalls identified in the capacity assessment report and to ensure continued delivery of the NI curriculum	15 m2 additional ancillary Principal’s Office accommodation by September 2025. 120 m2 additional teaching accommodation by September 2025. 15 m2 additional multipurpose space by September 2025.	This will ensure the school is compliant with the DE handbook and address the principals concerns with a lack of a secure office.
2.	Avoidance of disruption to pupils while facilities improvements are being provided	Zero school days lost as a during the construction period as recorded in the PPE by September 2025	This will ensure the school day can continue as normal without classes, timetables and building access being significantly disrupted.
3.	Improve the standard of the accommodation for occupants.	15 m2 additional ancillary [Principal’s Office accommodation by September 2024 Works carried out will comply with legislative requirements such as Building regulations, DDA etc. and adhere /align with all relevant statutory approvals granted. This compliance check will be carried out at Project close September 2025 and recorded at Post Project Evaluation stage September 2026.	The standard of accommodation will be improved by the adding the following areas to the school: 15 m2 additional ancillary Principal’s Office accommodation by September 2025. 120 m2 additional teaching accommodation by September 2024. 15 m2 additional multipurpose space by September 2025.
4.	Improvement of staff and pupil morale.	Improvements in Staff and pupil morale will be captured in the Post Project Evaluation via a customer satisfaction survey	This will deliver positive improvements to staff and pupil morals providing a DE handbook compliant facilities.

		where at least 70% of the people /users surveyed achieve at least a satisfactory response to the staff morale question to be completed by September 2026	
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Strategic Case Specialist Confirmation of Advice Provided			
Specialist Name:		Specialist Role:	Project Officer AMS
Date 14/05/24			
Senior Responsible Owner (SRO)			
Name:			
Date 14/05/24			

2. ECONOMIC CASE

IDENTIFICATION OF OPTIONS

Project Options Longlist: This table must show the long list of Options considered for the project. It must always include a Do Nothing and Do Minimum Option, with the Do Minimum representing the core functionality and essential requirements for the project.

Option	Description	Meets Objectives? (YES) or (NO)	Shortlisted (S) / Rejected (R)	Reason for rejection
1.	Do Nothing: No works carried out in order to meet Better Business Case Requirements	N	S	Requirement of NIGEAE
2.	Do minimum – Replacement of the failing mobile with modular x2 classrooms (Double Modular Unit) and reconfiguration of internal space for Principals office and multi-purpose space	Y	S	These are the minimum works required to address the needs identified.
3.	Replacement of the failing mobile with x2 New Build Standalone modular classrooms and reconfiguration of internal space for Principals office and multi-purpose space	Y	S	This option addresses the issues that have been set out within the initial objectives.
4.	Replacement of double modular with a traditional build extension and reconfiguration of internal space for Principals office and multi-purpose space & removal of existing mobile.	Y	R	Option 4 does not fit onto the site without major civils work, therefore it has been rejected at this stage.

Please note, the shortlist must include a minimum of four shortlisted Options - Do Nothing, Do Minimum, Recommended Option (the preferred way forward at this point) and at least one realistic alternative to the Recommended option.

CONSIDERATION OF SHORTLISTED OPTIONS

Please provide a description of each of the shortlisted Options. Include what each Option will involve and any identified advantages or disadvantages.

Option 1: Do Nothing

This option will see St Joseph's P.S remain as is with no works being undertaken to address the needs of the pupils and staff within the school going against the recommendations set out within the DE handbook and as per the needs of the school.

This option will not action any of the issues that have been highlighted and fails to address deficiencies. This option will allow for the lack of unsuitable facilities to continue going forward, continually affecting the staff and pupils.

This option requires no capital expenditure and will not meet any of the objectives that were initially set out within the feasibility report. This option fails to address the school's concerns regarding the deficiency in accommodation. Under this option these identified issues will continue to escalate over time.

Advantages

- No expenditure.
- No statutory applications/approvals required.
- No disruption to existing facilities.

Disadvantages

- Does not meet the objective, *'Provide necessary modifications or enhancements to the building environment to meet the shortfalls identified in the capacity assessment report and to ensure continued delivery of the NI curriculum'* No works carried out.
- Does not meet the objective, *'Avoidance of disruption to pupils while facilities improvements are being provided.'* No works carried out.
- Does not meet the objective, *'Improve the standard of the accommodation for occupants.'* No works carried out.
- Does not meet the objective, *'Improvement of staff and pupil morale.'* No works carried out.
- School still operating with significant deficiencies in accommodation.
- School will still be operating without a safe space for parent/ principal meetings/ confidential meetings to take place.

Option 2: Do minimum – Replacement of the failing mobile with modular x2 classrooms (Double Modular Unit) and reconfiguration of internal space for Principals office and multi-purpose space

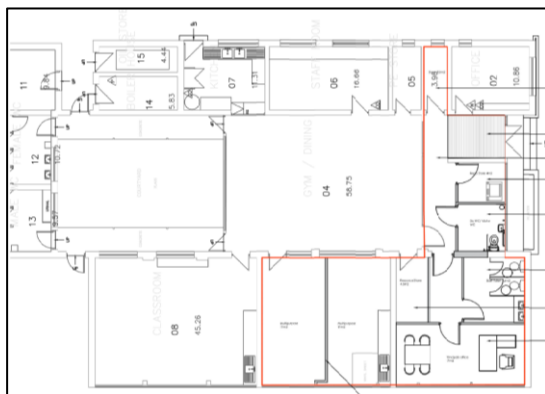
Option 2 will see the provision of standalone double modular unit to provide 2 new classrooms and associated toilets with an internal refurb of undersized classrooms to address the under provision of support and admin space. Removal of existing mobile at rear of site and relocation of containers to boundary corner.

Internal refurb-

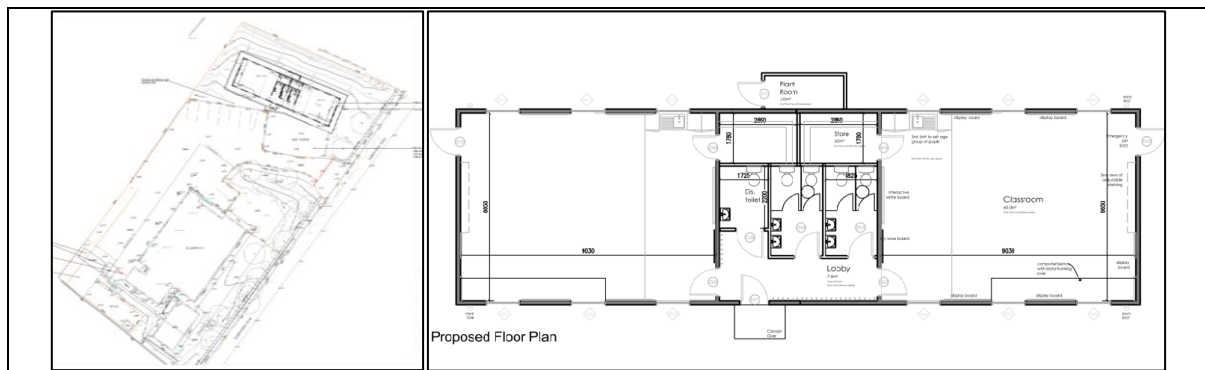
Works will be undertaken to the existing school building to address the shortfall in admin/support space. Two existing classrooms will sub-divided to provide the following accommodation:

- 2no. multipurpose rooms with acoustic divider @15m² with option to open to one 30m².
- Principal's offices @17m²
- Female staff toilets
- Disabled WC/ Visitor/ Male staff toilet
- Reprographics rooms @4m²
- Existing toilet to be converted to store.
- Resource store @4.5m²

Drawing below depicts the internal layout works that will be undertaken within the school under this option.



This option proposes to replace the single modular unit with a double unit as the proposed works to the internal of the building will remove existing classrooms. This loss of a classroom internally and the removal of the existing failing modular unit will be offset by the provision of a new two classroom double modular unit. Following completion of the works the school will be left with 4 general classrooms in line with the handbook, both the school and DE have been consulted and are content.



Double modular accommodation to provide.

- 2no. classrooms @ 60m²
- Male and female WC's
- Disabled WC
- 2 no classrooms store @6m²
- 1 no. plantroom

The modular building is to be sited on grass play area; this has been agreed with the school.

Proposed Works Process

A retaining wall near the existing car parking will be required. Relocation of large piece of play equipment and replacement wet pour will be required. Modular will be accessed via play area. Contractor and school will share access during construction. The contractor will require a site compound during the works to be agreed with the school.

Phasing of the works will have an impact on the school- internal refurb will reduce the number of usable spaces within the school building during the works. Work would be best scheduled over a summer period to reduce disruption to school. Temporary accommodation is not a viable option due to size of site.

Car Parking

The existing car park has a capacity of 7 standard car parking bays and 2 disabled parking bays. The works associated with this option will not have an impact on existing car parking numbers.

Services

Data, mains water and an electricity supply will be available to service the site.

Storm drainage can be discharged to existing infrastructure within the site of St Joseph's PS
Foul could be connected to the existing infrastructure within the site of St Joseph's PS

Advantages

- Meets the objective, *'Provide necessary modifications or enhancements to the building environment to meet the shortfalls identified in the capacity assessment report and to ensure continued delivery of the NI curriculum'* Provision of appropriately sized classrooms.
- Meets the objective, *'Avoidance of disruption to pupils while facilities improvements are being provided.'* No works carried out.
- Meets the objective, *'Improve the standard of the accommodation for occupants.'* Provides suitably sized accommodation.
- Meets the objective, *'Improvement of staff and pupil morale.'* Provides appropriate accommodation to address some of the school deficiencies.
- Classrooms and internal refurb can be completed in tandem to reduce time on site.

- Short contract period: no requirement to phase works as the majority of works takes place in isolation of main school building. Extent of works known and identified at tender stage, minimising impact on contract duration and costs due to unforeseen works.
- Minimal nuisance, noise, vibration, and dust impact on the main school building.
- The works are not phased; the manufacture of the accommodation takes place in the factory setting and delivered to site for second fix installation and finishing out.
- Residual value of unit – can be relocated to other premises if required.
- Low maintenance building. Reduction in maintenance costs. Eco-friendly construction.
- Reliable construction time frame.
- Compliance with DDA Regulations and recommendations.
- Compliance with Building Regulations.
- Contractor is wholly responsible for all Building Control applications, notifications, and approvals.

Disadvantages:

- Does not meet the objective, *'Avoidance of disruption to pupils while facilities improvements are being provided.'* This is subject to the phasing of works and when budget becomes available.
- Loss of useable greenspace
- Modular classrooms not linked to existing school.
- Does not address all school deficits.
- 2 classrooms and area around main entrance will be out of use during construction.
- Not permanent construction.
- Contractor and school will have to share access during construction period.

As this option proposes a new build structure, planning costs and permissions will need to be sought and will have a higher associated annual running cost attributed to rates/ cleaning/ maintenance when compared to other proposed options.

This option will incur recurrent costs on an annual basis due to increased utilities, cleaning and rates, these costs are as follows:

Maintenance:	£15	per m ² x	155m ² =	£2,325
Energy:	£6	per m ² x	155m ² =	£930
Cleaning:	£10	per m ² x	155m ² =	£1,550
Rates:				£1,691

Overall Additional Recurrent Costs = £6,496

This option carries an associated construction timeframe of 4 months though the project is expected to have a full timeline of 16 months when allowing for design and development and procurement. One phase will complete all the works.

Option 3: Replacement of the failing mobile with x2 New Build Standalone modular classrooms and reconfiguration of internal space for Principals office and multi-purpose space

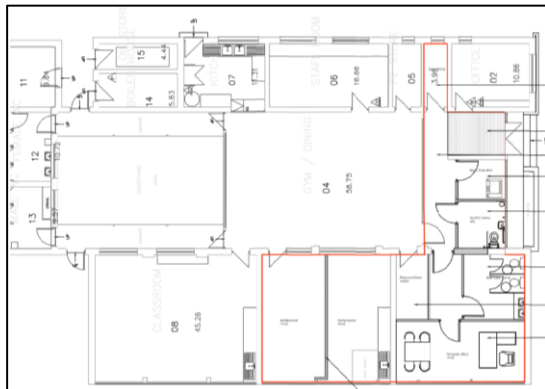
This option will see provision of 2 standalone single modulars units to provide 2 new classrooms and associated toilets with internal refurb of undersized classrooms to address the under provision of support and admin space.

Internal refurb-

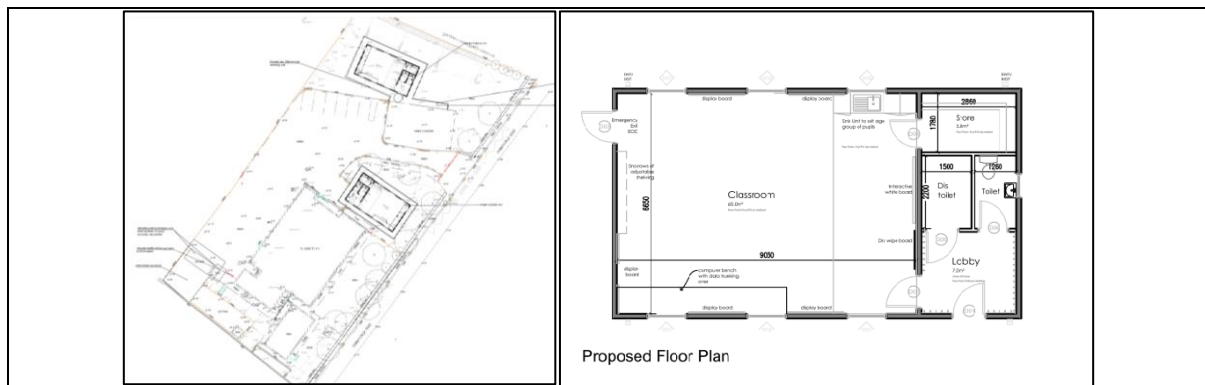
Works will be undertaken to the existing school building to address the shortfall in admin/support space. Two existing classrooms will sub-divided to provide the following accommodation:

- 2no. multipurpose rooms with acoustic divider @15m² with option to open to one 30m².
- Principal's offices @17m²
- Female staff toilets
- Disabled WC/ Visitor/ Male staff toilet
- Reprographics rooms @4m²
- Existing toilet to be converted to store.
- Resource store @4.5m²

Drawing below depicts the internal layout works that will be undertaken within the school under this option.



This option proposes to replace the single modular unit with a double unit as the proposed works to the internal of the building will remove existing classrooms. This loss of classrooms internally and the removal of the existing failing modular unit will be offset by the provision of two new standalone classroom modular units. Following completion of the works the school will be left with 4 general classrooms in line with the handbook, both the school and DE have been consulted and are content.



Each single modular accommodation to provide.

- 1no. classroom @ 60m²
- Male and female WC's
- Disabled WC
- 1 no classroom store @6m²
- 1 no. plantroom

Advantages:

- Meets the objective, *'Provide necessary modifications or enhancements to the building environment to meet the shortfalls identified in the capacity assessment report and to ensure continued delivery of the NI curriculum'* Provision of appropriately sized classrooms.
- Meets the objective, *'Avoidance of disruption to pupils while facilities improvements are being provided.'* No works carried out.
- Meets the objective, *'Improve the standard of the accommodation for occupants.'* Provides suitably sized accommodation.
- Meets the objective, *'Improvement of staff and pupil morale.'* Provides appropriate accommodation to address some of the school deficiencies.
- Classrooms and internal refurb can be completed in tandem to reduce time on site.
- Short contract period: no requirement to phase works as the majority of works takes place in isolation of main school building. Extent of works known and identified at tender stage, minimising impact on contract duration and costs due to unforeseen works.
- Minimal nuisance, noise, vibration and dust impact on the main school building.
- The works are not phased; the manufacture of the accommodation takes place in the factory setting and delivered to site for second fix installation and finishing out.
- Residual value of unit – can be relocated to other premises if required.
- Low maintenance building. Reduction in maintenance costs. Eco-friendly construction.
- Reliable construction time frame.
- Compliance with DDA Regulations and recommendations.
- Compliance with Building Regulations.
- Contractor is wholly responsible for all Building Control applications, notifications, and approvals.

Disadvantages:

- Does not meet the objective, *'Avoidance of disruption to pupils while facilities improvements are being provided.'* This is subject to the phasing of works and when budget becomes available.
- Loss of useable greenspace in 2 areas.
- Modular classrooms not linked to existing school.

- Does not address all school deficits.
- 2 separate modulars results in 2 different construction works areas causing more disruption to school.
- 2 classrooms and area around main entrance will be out of use during construction.
- Not permanent construction.
- Contractor and school will have to share access during construction period.

As this option proposes a new build structure, planning costs and permissions will need to be sought and will have a higher associated annual running cost attributed to rates/ cleaning/ maintenance when compared to other proposed options.

This option will incur recurrent costs on an annual basis due to increased utilities, cleaning and rates, these costs are as follows:

Maintenance:	£15	per m ² x	158m ² =	£2,370
Energy:	£6	per m ² x	158m ² =	£948
Cleaning:	£10	per m ² x	158m ² =	£1,580
Rates:				£1,724

Overall Additional Recurrent Costs = £6,622

This option carries an associated construction timeframe of 4 months though the project is expected to have a full timeline of 16 months when allowing for design and development and procurement. One phase will complete all the works.

MONETARY COSTS (excluding VAT and inflation): Please note, NPCs must be carried out for projects which will take over 12 months to complete. Revenue costs should also be included in these circumstances.

Summary of Costs					
			Option 1	Option 2	Option 3
1	Construction costs			£ 503,417.10	£ 494,665.18
2	Professional fees			£ 50,341.71	£ 49,466.52
3	Furniture & equipment			£ 36,000.00	£ 36,000.00
4	Statutory fees			£ 4,082.00	£ 4,037.00
5	EA fees			£ 10,068.34	£ 9,893.30
SUB TOTAL			£ -	£ 603,909.15	£ 594,062.00
6	Optimism Bias	10%	£ -	£ 60,390.92	£ 59,406.20
TOTAL BUSINESS CASE APPROVAL LIMIT			£ -	£ 664,300.07	£ 653,468.20

All project costs provided above have been verified and signed by a EA Quantity Surveyor from the Capital Commercial Unit.

Outline of cost assumptions made by EA Cost Commercial Unit in estimating the costs of each shortlisted option.

- All costs have been prepared at 28/03/24.
- All costs are exclusive of VAT as this is a Controlled Scheme
- No allowance has been made for increases in cost that may arise between 28.03.24 and receipt of tenders.

NON-MONETARY ASSESSMENT

Note: Non-monetary factors need consideration for each project, please ensure these factors are reviewed, linked to objectives of the project and are specific to the outcomes

Non-monetary factor	Option 1	Option 2	Option 3	Rationale for scoring
Improved standard of accommodation	-3	+3	+2	Option 1: This option proposes no works and does nothing to address the identified accommodation concerns. This option will therefore will not improve the standard of the accommodation. Options 2 and 3: both address the issues and concerns raised by the school and improve the standard of accommodation by offering a DE handbook compliant standard, of which meets the requirements set out at the initial meeting with the school, AMS and DE. Option 3 reduces 2 areas of usable green space in the school grounds, while Option 2 only uses 1 area of green space and scores accordingly. In addition, Option 3 will provide a more spread-out learning environment with units spread through the school site. This is reflected in the scoring of this option.
Staff and pupil morale	-3	+3	+3	Option 1: will have a negative impact upon staff and pupil morale within the school. Staff and pupils will remain in the current accommodation which is cramped and not handbook compliant. The concerns- lack of a principal office and accommodation (as highlighted above) will not be addressed with no works being provided. Options 2 and 3 will have a positive impact on staff and pupil morale as staff and pupils will feel reassured by the new spacious arrangements added to the school building. The school will have a higher standard of accommodation and benefit from the addition of: • 2 multipurpose rooms. • Principal's office. • Female staff toilets. • Disabled WC/ Visitor/ Male staff toilet. • Reprographics room. • 2 new resource stores

Enhanced delivery of the curriculum	-3	+3	+2	Option 1: This option proposes no works and does nothing to enhance the delivery of the curriculum therefore scores accordingly. Option 2 will enhance the delivery of the curriculum as the additional resource and multipurpose space will enable teachers to deliver a better teaching experience. Option 3 proposes to place the 2 modular units' side by side and this may be deemed a more conducive learning environment. Option 3 will also enhance the delivery of the curriculum as the additional resource and multipurpose space will enable teachers to deliver a better teaching experience. However, Option 3 proposes the placement of 2 separate modulars meaning 2 separate areas for teaching as opposed to Option 2 being a double modular and more contained. This slightly impacts upon the scoring of this option.
Ease of implementation (ensure minimal disruption)	n/a	-1	-3	Option 1: involves no works to be undertaken therefore there is no disruption. Option 2 this option involves a considerable amount of works to the main school this will cause some disruption through the duration of the work. The double modular unit will be less disruptive to the school when compared to other options, the double modular unit will contain the installation works to one area of the school site, reducing potential disruption and leaving for easier implementation. This is reflected in the score of this option. Throughout the works mitigating measures can be put in place to minimise the impact of the works on day-to-day operations of the school. Option 3 this option also involves a considerable amount of works to the main school and will cause some major disruption through the duration of the work. The works required for 2 separate single modular units, on 2 different areas of the school, will be more disruptive when compared to 1 double modular unit (Option 2) This is reflected in the score of this option. Throughout the works mitigating measures can be put in place to minimise the impact of the works on day-to-day operations of the school.
Overall score:	-9	+8	+4	Option 2 ranks highest in the no monetary score due to the reasons highlighted above.

KEY: Options scored on a scale of -3 to +3

Potential Non-Monetary Factors may include:

- Enhanced delivery of the curriculum.
- Staff and pupil morale.
- Improved standard of accommodation.
- Ease of implementation (ensure minimal disruption); and,
- Health and safety

RISK ASSESSMENT

Note: Please ensure risks are specific to the project and take account for issues raised within the Feasibility Report (FR), i.e. statutory approvals, investigations/surveys not completed for FR, etc

Risk Description	State how the options compare and identify relevant risk management / mitigation measures					
	Option 1		Option 2		Option 3	
	I	P	I	P	I	P
1. Failure to provide staff and pupils with the required DE compliant accommodation.	H	H	L	L	M	M
Option 1 – (High Impact High Probability) this option does not propose any works be undertaken therefore this option carries a high impact and high probability score as the required facilities will not be provided, leaving the school in its current state, and lacking the facilities that are required. Option 2 (low impact, low probability) This option will fully address the recommendations made by DE, the school and AMS regarding the deficit of accommodation in the school. Option 3 (Medium Impact, medium probability) This option will also fully address the recommendations made by DE, the school and AMS regarding the deficit of accommodation in the school. However, 2 areas of greenspace will be utilised by the 2 separate modular classrooms, which will negatively impact the children's play space. Any inherent risk is mitigated under Options 2 and 3 through putting in place a competent design and management team to ensure all works meet the legislative requirements and ensure that all the works carried out will comply with the DE handbook.						
2 Failure to provide improvements within given timescale.	-	-	L	L	M	M
Option 1: No works will be undertaken with Option 1 therefore this risk is not applicable. Option 2 (Low impact, Low probability) this option carries a Low risk as it will provide the necessary accommodation as and when required. The risk of delays will be mitigated/managed via the appointment of competent contractors and early engagement with statutory						

							authorities which will also mitigate any potential delay risks as EA will work with all statutory bodies to ensure as far as possible, that all legislative requirements etc. are fulfilled. Active programme management of works and competent site management will also be employed to try and lessen this risk. The necessary improvements will be delivered within the timeframe of September 2025. Option 3 (Medium impact medium probability) this option has a medium impact, medium risk it will provide the necessary accommodation as required. The risk of delays will be mitigated/managed via the appointment of competent contractors and early engagement with statutory authorities which will also mitigate any potential delay risks as EA will work with all statutory bodies to ensure as far as possible, that all legislative requirements etc. are fulfilled. Active programme management of works and competent site management will also be employed to try and lessen this risk. The necessary improvements will be delivered within the timeframe of September 2025, however due to the 2 modular site works are more likely to be delayed and this may impact the school's ability to be fully operational for the new school year. The provision of temporary accommodation for an office, between, between the start of the school term in August and the completion of the full option construction works has been factored in and agreed with DE for both Options 2 and 3.
3. Likelihood of unforeseen/additional works	-	-	M/L	M/L	M/L	M/L	Option 1: No works will be undertaken with Option 1 therefore this risk is not applicable. Option 2 and 3(Medium impact, Low probability): With both options unforeseen/additional works are not envisaged, however careful project management and the V3 June 2022 Page 22 appointment of competent contractors will ensure that all appropriate surveys in

							relation to the proposed works are undertaken before work is commenced. Both options are considered to be low risk as it is not envisaged that there will be a requirement to carryout additional works.
4. Disruption to school and additional security and/or school management issues	L	L	M	M	H	H	Option 1 – (Low Impact Low Probability) this option does not propose any works be undertaken therefore this option carries a low impact and low probability score as there will be no additional security required. Option 2 (Medium Impact, medium probability) this option will cause disruption to the school due to the building works involved with the extension however the disruption will be less than Option 3 as there is only one site effected by the addition of a double modular. Appropriate scheduling and management of all/any disruptive works to have the least amount of impact upon the school. Works will be commenced at a time when the least amount of impact will be experienced by the school in an effort to minimise the disturbance from internal demolition and renovations. Potential disruption will be minimised through careful Project Management and planning. Option 3 - High Impact High Probability) this option will cause a high disruption level to the school due to the building works involved and the fact that there will be 2 sites for 2 separate modular building to be erected. Appropriate scheduling and management of all/any disruptive works to have the least amount of impact upon the school. Works will be commenced at a time when the least amount of impact will be experienced by the school in an effort to minimise the disturbance from internal demolition and renovations. Potential disruption will be minimised through careful Project Management and planning.
Overall Risk (H/M/L)	M	M	L/M	L/M	H/M	M	

Potential Risks may include some/all of the following, as well as others:

V3 June 2022

- Disruption to school and additional security and/or school management issues;
 - Failure to complete within programme funding period;
 - Failure to meet statutory approvals or other legislative requirements;
 - Likelihood of unforeseen/additional works;
 - Pupil and staff health and safety during works
 - Covid-19 impacts
-

PLANNING IMPACTS

Will any of the following factors impact on the project? If so please provide detail of the impacts:	
Major Works announcement	n/a
SEP announcement	n/a
Fresh Start announcement	n/a
Annual Area Action Plan	n/a
Minor Works Applications	n/a
Any other factors	Despite the school's enrolment being under 100 pupil there is no mention of closure by area planning

SUMMARY

Note: if the project requires NPC's to be calculated these should be inserted in the table below and ranked accordingly. DE advise that "if a project is over £500k and will take over 12 months to complete then NPCs must be completed in accordance with standard NIGEAE Guidance. If the project will take less than 12 months, NPCs are not required."

	Option 1	Option 2	Option 3	Explanation for scores
Monetary Costs	£0	£664,300.57	£653,468.20	Option 1 ranks the best as there are no costs associated with this option.
Rank	1	3	2	Option 3 ranks 2nd - This option will address all the project objectives but carries more issues for school and is just marginally cheaper than option 2 Option 2 ranks 3rd – it will address all the project objectives and is the preferred option of the school however, Option 2 is more expensive than Option 3 by £11,131.87
Non-monetary Score	-9	8	4	Option 1 provides no benefits as no work will be completed.
Rank	3	1	2	Option 3 is ranked 2nd as it meets the needs of the accommodation analysis and the DE handbook guidelines and will improve the current accommodation, however it will see green play space reduced in the school grounds, this option has 2 modular sites to make good, the implementation period may be longer and if it runs over on time may disrupt the school term in September 2025. Option 2 ranks 1st, this option meets the needs of the accommodation analysis and the DE handbook guidelines and will improve the standard of accommodation. The fact that there is only one modular unit will mean teaching will be less isolated this will benefit pupil and staff morale. Works is seen to have a more positive impact upon the school and can be delivered with less impact upon the school site.

Risk	M - M	L/M – L/M	H/M - H/M	Option 1 provides no benefits as no work will be completed it is scored accordingly. Option 3 is ranked 2nd as it will cause more disruption to the school and the proposed 2 separate modular unit locations will be more difficult to implement, this will have a greater impact upon the school facilities. Option 2 ranks 1st as it is the preferred option of the school, it meets the project objectives, it is not reducing the play space of the school. Implementation will be more straight forward and effective as there is one modular unit as opposed to 2 in Option 3.
Rank	2	1	3	
NPC's (if required)	n/a	n/a	n/a	
Rank				

SUMMARY OF OPTIONS (detailed consideration of all assessed factors and selection of preferred Option)
Option 1 Do nothing:

This option will see St Joseph's PS Strangford remain in its current state, no works will be undertaken to address the concerns that have been brought to light by the school and the accommodation deficiencies will remain as is.

This option will not action any of the issues that have been highlighted within the Minor works application and fails to address the current concerns with the lack of a principal office, resource space, storage, and classroom space. This option requires no capital expenditure and will not meet any of the objectives that were initially set out within the feasibility report.

These issues will continue to escalate over time increasing the potential for an incident to occur from the lack of appropriate facilities for staff and pupils. This option will leave the school in its current state without any works being carried out to address any of the issues that have been highlighted and identified.

Option 2: Do minimum – Replacement of the failing mobile with modular x2 classrooms (Double Modular Unit) and reconfiguration of internal space for Principals office and multi-purpose space

Option 2 fully meets the project objectives of the Business Case as the works recommended by the DE, AMS and the school to improve the facilities, and the health and wellbeing of the principal, will be fully addressed. This option will see the addition of:

- 2 multipurpose rooms with acoustic divider @15m2 with option to open up to one 30m2.
- principals' offices @17m2
- Female staff toilets
- Disabled WC/ Visitor/ Male staff toilet
- Reprographics rooms
- Existing toilet to be converted to store.
- Resource store

This option proposes to replace the single failing modular unit with a double unit as the proposed works to the internal of the building will remove existing classrooms. This loss of a classroom internally and the removal of the existing failing modular unit will be offset by the provision of a new two classroom double modular unit. Following completion of the works the school will be left with 4 general classrooms in line with the handbook, both the school and DE have been consulted and are content.

This option is the preferred option by the school, however financially this option is more expensive than Option 3 by £11,131.87. It takes up less green play area and will cause significantly less disruption to the school than Option 3.

Option 2 does have risks associated with it, but these are essentially limited to disruption to the school during short-term construction works. This option reduces the health and safety risks in the long term to pupils and teaching staff, by providing a safe, purpose built, DE compliant facilities which the school needs.

Option 3: Replacement of the failing mobile with x2 New Build Standalone modular classrooms and reconfiguration of internal space for Principals office and multi-purpose space

Option 3 fully meets the project objectives outlined in the Business Case, as the works recommended by the DE, AMS and the school to improve the facilities and the health and wellbeing of the principal, will be fully addressed.

Financially, Option 3 is the preferred option as the works which will be undertaken is lower in cost than option 2. It's worth noting that the school is already short of space and this option takes away valuable green space from 2 play areas and cannot be replaced. As a result, this option scores poorly on non-monetary impact

Option 3 has a high /medium risk associated and will cause a high disruption level to the school due to the building works involved with the extension and the fact that there will be 2 sites for 2 separate modular building to be erected.

Recommended Option

Having considered all options, and assessed the monetary, non-monetary and risk impacts, it is the assessor's opinion that Option 2 is the preferred option, although it is not the cheapest option available, it fully addresses the requirements of the school and the principal and has the least negative impact on the school.

Works were discussed with the school and the principal and board of governors favour this option as it meets the needs of the school and it reduces the health and safety risk, GDPR and confidently risk as identified in the minor works request form.

This is the preferred option of the school; it also meets the needs of the accommodation analysis and the DE handbook guidelines and will improve the standard of accommodation. The fact that there is only one modular unit will mean teaching will be less isolated this will benefit pupil and staff morale. This option also does not impact the green play space in the school as much as Option 3.

Option 2 has therefore become the recommended option in the Business Case as this option has the most positive factors and provides greater Value for Money when compared to the other options.

Economic Case Specialist Confirmation of Advice Provided			
Specialist Name:		Specialist Role:	Project Officer
Date: 28/05/2024			
Senior Responsible Owner (SRO)			
Name:			
Date: 28/05/2024			

1. COMMERCIAL CASE

In this section, the appraiser should provide an outline of the proposed procurement for the preferred option – i.e. what will be procured and how.

Please ensure that all the guidance provided in PGN 01/07 “Grant and Procurement” is followed and is reflected below when completing the Commercial Case. Detail should be provided on the procurement/grant process and assurance given that procedures are followed as required. The following information should be provided:

- Describe the outputs – i.e. goods, services and works that will be procured in relation to the recommended / preferred option and how this will be paid for.
- Outline how the goods, services and works will be paid for e.g. payment against milestones, payment against delivery of services, performance related pay (e.g. KPIs), availability or usage, the pricing strategy objectives.
- Identify and explain any associated mitigation or reduction of procurement risks through the contract should be detailed.
- Set out the approach / route to procurement (i.e. the strategy to undertake it), the source of procurement advice and how it fits with marketplace conditions;
- How the proposed approach meets existing procurement rules and regulations and achieves value for money.
- Market knowledge, e.g. demonstrate whether there has been any supplier engagement, any assessment of the viability of concept, the market risks and the number of potential bidders.
- Explain any legal / personnel implications of the recommended / preferred option, if applicable, and how they will be managed.

Please identify below which procurement route the project is to follow.

**(Use strikethrough to delete route not being taken)*

~~*EA's Term Service Contractor~~

~~(Framework currently in place until 31 May 2022 with potential extensions)~~

- ~~• The Education Authority's Term Service Framework (TSF) has been established in compliance with Public Contract Regulations.~~
- ~~• The TSF was competitively tendered and value for money established.~~
- ~~• The scope/value of the TSF does not exceed the £500,000 works threshold.~~
- ~~• Payment mechanisms will align with the agreed TSF conditions for i.e. pricing, milestones, payment of invoices, KPI's~~

~~The EA is currently working on the re-tendering of the Framework.~~

***External Procurement of Contractor**

- The project will be procured via the Education Authority's Dynamic Shortlisting System (DSS) as the value falls below the construction works threshold of £4.5m.
- Payments will be made on a monthly basis in accordance with the NEC Conditions of Contract.
- Procurement risk is minimal as the Authority's DSS is for below threshold construction works (£4.5m) and has been in operation for over two years and has not received any legal challenges to date.
- To ensure the project requirements fit within market place conditions the DSS has four works cost bands i.e.
 - Below £30,000
 - £30,000 - £500,000
 - £500,000 - £2,000,000
 - £2,000,000 – £4,500,000
- The EA's DSS is modelled on CPD's DSS and is compliant with all relevant procurement regulations and legislation.
- An expression of interest driven approach ensures value for money.

The DSS was introduced following extensive market engagement with the Construction Employers Federation (CEF) and market feedback has been positive to date.

Commercial Case Specialist Confirmation of Advice Provided (CPD or procurement specialist)			
Specialist Name:		Specialist Role:	Senior Category Manager – Minor Works Procurement

2. FINANCIAL CASE

Following on from the procurement strategy, the appraiser should outline how the project will be funded. The table below provides an overview of the total costs of the project, including any VAT and inflation.

Summary of Preferred Option Total Costs					
			Preferred Option (base costs)	VAT	Preferred Option Total
1	Construction costs		£ 503,417.10	£ 100,683.42	£ 604,100.52
2	Professional fees		£ 50,341.71	£ 10,068.34	£ 60,410.05
3	Furniture & equipment		£ 36,000.00	£ 7,200.00	£ 43,200.00
4	Statutory fees		£ 4,082.00		£ 4,082.00
5	EA fees		£ 10,068.34	£ 2,013.67	£ 12,082.01
	SUB TOTAL		£ 603,909.15	£ 119,965.43	£ 723,874.58
6	Optimism Bias	10%	£ 60,390.92	£ 12,078.18	£ 72,469.10
TOTAL BUSINESS CASE APPROVAL LIMIT			£ 664,300.07	£ 132,043.61	£ 796,343.68

Budget from which funding to be allocated	Sum funded & % of total	Funding secured? Yes/No	If not secured, indicate status of negotiations
DE Minor Works	£796,343.68 100%	NO	Ongoing

Financial Case Specialist Confirmation of Advice Provided			
Specialist Name:		Specialist Role:	Budget Support Officer
Date: 14/05/24			
Grade 7 in DE Finance			
Name:			
Date:			

3. MANAGEMENT CASE

PROJECT MANAGEMENT (to include project timescales and any other relevant information such as any potential significant management issues)	
Dates below relate to time from Business case approval. DSS01 – BW Design Development & Planning Approval: 5 Months Procurement: 2 Months Construction: 4 Months Post Project Evaluation (12 months after completion of project): 12 Months Please note these dates do not factor in the current climate of Covid-19 as the effect on timeline cannot be quantified at this time. Please note, a Risk Register is attached as Appendix A and a Benefits Realisation Plan (for projects valued over £500,000) is attached as Appendix B.	
Expected Post-Project Evaluation Date: (12 months from completion of project)	September 2026
Name/Position of person completing the PPE	EA Asset Management
Project SRO	 Head of Minor Capital Programme Delivery
Project Manager	

Management Case Specialist Confirmation of Advice Provided			
Specialist Name:		Specialist Role:	Project Manager
Date: May 2024			
Senior Responsible Owner (SRO)			
Name:			
Date: May 2024			

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Appendix A – Risk Log for the Preferred Option

Please only complete this section if the project is valued at over £500,000.

This section should identify all perceivable risks associated with the preferred option (including those risks previously identified in the Business Case).

Risk Description	Category (e.g. funding, operational, etc.)	Impact (L/M/H)	Probability (L/M/H)	Proximity (short, medium, long-term)	Countermeasures	Owner	Author	Date Identified	Date Last Updated	Current Status
Risk 1 Failure to provide suitable accommodation to meet DE requirements.	Strategic	H	L	Medium	Consultation with all stakeholders to ensure the required accommodation is delivered	EA	EA	May 2024	May 2024	
Risk 2 Disruption to St Joseph's Primary School	School	M	M	Medium	Robust project and programme management, progress meetings and risk reduction measures implemented.	EA	EA	May 2024	May 2024	
Risk 3 Failure to complete within the programme window.	Programme	H	L	Short	Robust project and programme management, progress meetings and risk reduction measures implemented.	EA	EA	May 2024	May 2024	
Risk 4	Funding	H	L	Medium	Robust project and financial management, progress meetings and risk reduction measures implemented.	EA	EA	May 2024	May 2024	

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Failure to complete within the approved funding										
Risk 5 Failure to meet statutory approvals or other legislative requirements	Statutory /Legislative	L	L	Short	Appropriate project management and competent design team procured to ensure all of the necessary approvals are achieved. Early discussions with statutory agencies will take place to ensure works comply with necessary requirements	EA	EA	May 2024	May 2024	
Risk 6 Likelihood of unforeseen/additional works	Construction	M	L	Short	Appropriate surveys and investigations carried out by suitable specialist prior to works being undertaken.	EA	EA	May 2024	May 2024	

Appendix B – Benefits Realisation Plan

Please only complete this section if the project is valued at over £500,000.

Benefits included below can be derived from the objectives and non-monetary benefits outlined in the document previously. In general, they can be: financial e.g. a reduction in management costs; or non-financial e.g. improvement in educational outcomes. Information should be included on how the benefits will be measured, when they will be achieved, and who will be responsible for monitoring benefit realisation.

Benefit Owner	Benefit Description	Baseline Value	Target Value	How will it be measured?	Responsible Officer	Dates/Timing
EA/School	Provision of a fit-for-purpose De compliant teaching accommodation and resource space	Current school accommodation available	Provision of the required additional teaching accommodation and resource space	Compliance with DE Building Handbook. Condition and suitability survey. Provide a fit for purpose teaching accommodation that will meet the needs of the users and help to deliver the requirements of the curriculum	Education Authority - Operations & Estates Team	Baseline September 2025 Target Survey carried out 12 months after works completion
School	Improved curriculum delivery as a result of additional teaching accommodation and resource space	Current curriculum delivery issues due to lack of teaching accommodation.	Improved delivery of curriculum as a result of the additional teaching accommodation and resource space	Pupil/parental survey	Education Authority - Operations & Estates Team	Baseline September 2025 Target Survey carried out 12 months after works completion
School	Improved Morale	Existing levels of morale of staff, pupils, and parents	Improved staff, pupil and parent morale with the delivery of the required DE teaching	Improvements in staff, pupil and parent morale will be captured via a customer satisfaction survey where at least 70%	Education Authority - Operations & Estates Team	Baseline September 2025 Target Survey carried out 12 months after works completion

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			accommodation and resource space	of the people /users surveyed achieve at least a satisfactory response to the staff morale question survey in the Post Project Evaluation		
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Feasibility Report



FR St Jospehs PS
Strangford.pdf

Drawings



40121521 (2-) L05 40121521 (2-) L04 40121521 (2-) L03 40121521 (2-) L01 40121521 (2-) L01
Option 3 proposed Option 3 site plan.pOption 2 proposed Option 2 site plan.p Internal rehub.pdf

Costs



Option 3.pdf



Option 2.pdf