

Open Report on behalf of Debbie Barnes, Director of Children's Services

Report to:	Mrs P A Bradwell, Executive Councillor for Adult Care, Health Services and Children's Services
Date:	28 June 2013
Subject:	Proposal for a new primary Academy in Bourne (submission to Secretary of State of results and evaluation of process to identify an operator)
Decision Reference:	02108
Key decision?	Yes

Summary:

The County Council has a statutory duty to provide sufficient school places for all Lincolnshire children. There is expected to be a shortfall of required places in Bourne with sufficient local demand to justify the need for a new primary school which will serve the local community and meet parental demand.

This report follows on from the Executive Councillor report discussed at Children and Young People Scrutiny Committee (CYPSC) on 7 September 2012 when the committee resolved that support be given to the proposal for a new primary school in Bourne to open in September 2014. It was also proposed by the committee that in order to find a suitable operator to run the school in Bourne the process should be followed as detailed in the report to the Executive Councillor entitled "The process for setting up a new school/academy, including the assessment of potential operators, for future new academies/free schools in Lincolnshire" which was also considered by the CYPSC on 7 September.

This report is to update on the progress of the proposal for a new primary Academy in Bourne now that the evaluation process for finding a suitable operator has been completed.

A site for the school has been secured. The Section 106 agreement for an education contribution from the developer will provide a site on Elsea Park and a capital contribution towards the cost of creating a 1 Form Entry (1FE) primary school. Formal applications were submitted by three organisations looking to become the operator of the new Academy. These have been assessed by an evaluation panel and further details of this assessment together with the results of the scoring process are included in this report.

This report seeks to advise the Executive Councillor on approving the assessment and evaluation of the proposals and the selection of the preferred operator to be submitted to the Secretary of State who will make the final decision regarding the choice of operator of the new Primary Academy in Bourne.

Recommendation(s):

The Executive Councillor is recommended to approve the submission of the following to the Secretary of State as the Council's assessment of the proposals received in respect of the proposed operator of a new primary Academy in Bourne:-

The scoring of the proposals;
The comments of the CYPSC; and
Confirmation of the Council's preferred operator as Bourne Abbey Church of England Primary Academy

Alternatives Considered:

1. Not to submit an assessment of the proposals received or the selection of a preferred operator, and to begin the process again for finding a suitable operator. This would perhaps only be appropriate if none of the applications were deemed to be suitable. This however is not the case as the assessment process demonstrated that there is at least one suitable operator from the applications received. To begin the process again would also take considerable time, and when an alternative operator were found they would have less time to plan for the opening of the new Academy in September 2014.
2. That the Secretary of State is forwarded the proposals, the scores and the scrutiny comments but no selection of a preferred operator by the Council. Departmental Advice (Appendix A) does not require the Council to state a preference. However, if a Local Authority (LA) does have a preference as a result of the assessment carried out then that preference will be taken into consideration by the Secretary of State when deciding whether or not to enter into a Funding Agreement with any of the proposers.

Reasons for Recommendation:

The recommendation recognises the advice on how to manage the selection process for an operator for a new school/Academy but widens the scope of the assessment to be submitted beyond that advised in the Departmental Advice to include additional criteria by which the operators were assessed, and to incorporate the comments of CYPSC. This is to ensure a full and robust process for the overall assessment of the proposals received and is in the interest of providing the Secretary of State with the fullest detail on which to base his decision.

1. Background

The LA is the commissioner of school places with a statutory duty to ensure that there are sufficient school places across the whole of Lincolnshire. National birth rates have been steadily rising in recent years having an impact on the demand for

places in the primary sector. Bourne is an area of Lincolnshire that is experiencing similar pressure. The significant housing development of Elsea Park has also contributed to the rising pupil numbers in Bourne justifying the need for a new primary Academy of 1 FE (210 places/intake of 30 per year group).

On 1 February 2012 the Education Act 2011 introduced changes to the legislation relating to the process for establishing new schools including the Academy/Free School presumption. (Further details in Appendix A attached) Where a LA identifies the need to establish a new school, the new section 6A of Education and Inspections (EIA) 2006 places the authority under a duty to seek proposals to establish an Academy/Free School. Once the LA has identified an appropriate site and secured the funding through the capital programme the next step in the process is to seek proposals for an operator for the new Academy. This process, (attached as Appendix B), was set up following guidance issued by the Department for Education (DfE) and finalised as per the CYPSC report of 7th September 2012 referred to above. Full details of the process followed for the proposal for the new Academy in Bourne are provided in the Consultation section below.

2. Conclusion

A decision is required from the Executive Councillor to approve the submission of information to the Secretary of State as set out in this report regarding the proposed operator of the new Primary Academy in Bourne. This takes into account the non-binding advice of the DfE. The final decision of the choice of operator then rests with the Secretary of State.

3. Legal Comments:

The legal issues to be taken into account in the making of this decision, which is within the remit of the Executive Councillor, are fully set out in this report.

4. Resource Comments:

There are no significant financial implications arising from the recommendation in this report, i.e. to approve submission to the Secretary of State of the Council's assessment of the proposals for a new operator.

The building of a new school will have financial implications and will give rise to the capital costs being met in part from the s.106 arrangements, and the on-going revenue costs being funded from the Dedicated Schools Grant.

5. Consultation

The LA has co-ordinated the process throughout following guidance from the DfE.

The need for additional places in Bourne was consulted on with LA officers from Admissions, School Transport, Children's Services Directorate Management Team

and the Executive Councillor for Children's Services. Head teachers from neighbouring primary schools in Bourne were also contacted to discuss the proposal to build a new school on Elsea Park.

The process to secure an operator for the Academy commenced on 1 October 2012 with letters being sent out to a wide range of interested parties (list attached as Appendix C) including all mainstream operators of education in Lincolnshire. (Letter attached as Appendix D) The information was also published on the Lincolnshire County Council website. The DfE passed on this information via the Independent Academies Association and the New Schools Network to an established list of potential operators and sponsors across the country. All individuals and organisations that expressed an interest in the proposal were provided with an application pack. (Appendix E)

After the closing of the application period on 16 November 2012 an evaluation panel was set up to consider the three applications that were submitted. The panel comprised the Assistant Director for Children's Services, a Lincolnshire County Councillor, a representative from the Lincolnshire CYPSC and two Head teachers of Lincolnshire LA maintained Primary Schools. The panel, which met on 20 December 2012, was also supported by an independent advisor from Children's Commissioning and officers from Children's Services.

The panel thoroughly discussed and scored each of the applications using a scoring and weighting system (copy attached as Appendix F) applied to the agreed criteria of G1 – G10 which were specified in the application pack provided to all applicants. The criteria G1 – G10 on which the scoring was based are listed in the attached Appendix G.

All three applicants were judged to be potentially suitable operators and were therefore all invited to participate in the next round of the assessment process to enable them to clarify and/or expand on their submissions. Applicants were asked to prepare a presentation entitled *"If we visited the Academy in five years time please explain to us what would make the Academy special and stand out from other schools/Academies?"* and advised that in addition to questions arising out of their presentation the panel would also be asking further questions. These 5 questions were scored by the panel using the same scoring basis of 0 – 5 as in the initial evaluation (Appendix F) although no weighting was incorporated. Each of the questions was asked of all three applicants who were not given the questions until the day of the presentations (copy of questions attached as Appendix I). Scores were allocated by the panel to the presentations and the 5 additional questions.

The scores from the panel evaluation day and the presentation/interview day were combined to produce an overall score for each applicant. One of the applicants subsequently withdrew from the process and therefore their scores are not included within this report. Appendix H, attached to this report, details the scores achieved by the two remaining applicants. At a further meeting the panel unanimously agreed that the proposal submitted by Bourne Abbey Church of England Primary Academy met all of the criteria to a 'good' standard or better and wished to confirm them as the preferred operator to the Secretary of State.

a) Has Local Member Been Consulted?

Yes. The local member has been made aware of the proposal for a new Primary Academy in Bourne and has had discussions with the Executive Councillor and LA Officers.

b) Has Executive Councillor Been Consulted?

Yes. The Executive Councillor has been fully involved in the discussions regarding the proposal for a new Primary Academy in Bourne.

c) Scrutiny Comments

The CYPSC considered this report at its meeting on 14 June 2013. Comments from this meeting are included below to inform the Executive Councillor when making her final decision which is due on 28 June 2013:-

d) Policy Proofing Actions Required

An Impact Analysis regarding the selection of the preferred operator has been completed and is attached to this report as Appendix J. In summary the analysis is indicative of a positive impact in that the operator, as selected by the Secretary of State, will be one of the suitable applications which have been submitted by well established and successful organisations with proven background in educational provision to the highest standard, also having sound financial backing together with well resourced and experienced support teams.

6. Appendices

These are listed below and attached at the back of the report	
Appendix A	Departmental Advice
Appendix B	Process map to open a new Academy
Appendix C	List of Interested Parties
Appendix D	Letter to commence consultation
Appendix E	Application Pack
Appendix F	Scoring mechanism
Appendix G	Criteria G1 - G10
Appendix H	Scores awarded to each applicant
Appendix I	5 Questions asked at presentation/interview day
Appendix J	Impact Analysis of selection of operator

7. Background Papers

The following background papers as defined in the Local Government Act 1972 were relied upon in the writing of this report.

Document title	Where the document can be viewed
----------------	----------------------------------

Proposed New Primary School for Bourne	Lincolnshire County Council CYPSC records 7 September 2012
The process for setting up a new school/Academy, including the assessment of potential operators, for future new Academies/free schools in Lincolnshire	Lincolnshire County Council CYPSC records 7 September 2012

This report was written by Michelle Andrews, who can be contacted on 01522 553269 or Michelle.andrews@lincolnshire.gov.uk.

ESTABLISHING A NEW SCHOOL

DEPARTMENTAL ADVICE FOR LOCAL AUTHORITIES AND NEW SCHOOL PROPOSERS

ABOUT THIS DEPARTMENTAL ADVICE

1. On 1 February 2012, section 37 of the Education Act 2011 was commenced, introducing Schedule 11 of the Act. This makes changes to part 2 of the Education and Inspections Act 2006 in relation to the process for establishing new schools, including the academy/Free School presumption. This advice is non-statutory and has been produced to help new school proposers and local authorities understand their duties in relation to these changes.

EXPIRY/REVIEW DATE

2. This advice will be reviewed by October 2012.

WHAT LEGISLATION DOES THIS ADVICE RELATE TO?

- The Education Act 2011 (EA 2011)
- The Education and Inspections Act 2006 (EIA 2006)
- The School Organisation (Establishment and Discontinuance of Schools)(England) Regulations 2007, as amended (Establishment and Discontinuance Regulations)

WHO IS THIS ADVICE FOR?

3. This advice is for:
- Local authorities;
 - New school proposers; and
 - Dioceses and Diocesan Boards of Education.

KEY POINTS

- The new “presumption” for an academy/Free School requires local authorities to seek proposals to establish an academy/Free School in the first instance where they identify a need for a new school.
- Local authorities must continue to plan for and secure sufficient schools for their area in line with their duties under section 14 of the Education Act 1996.
- Local authorities should assess the proposals they receive against the criteria in paragraph 12 below before forwarding all of the proposals to the Secretary of State. He will take into consideration any preference they indicate.
- Local authorities can no longer hold a school competition without the Secretary of State’s consent, nor enter their own community or foundation school proposals into a competition.
- Despite the academy/Free School presumption, in certain exceptional circumstances it is still possible to publish proposals for a new maintained

- school outside of a competition, under sections 10 or 11 of the EIA 2006.
- The Secretary of State's consent is no longer required to publish certain proposals, including those for the establishment of new voluntary aided schools, primary schools resulting from infant/junior amalgamations, and new schools resulting from the reorganisation of existing faith provision.
- "Academy" is the legal term which also includes Free Schools of all types, University Technical Colleges (UTCs) and some Studio Schools, including 16-19 and alternative provision (PRU) establishments. This document uses "academy/Free School" as the collective term for these types of schools.
- "Proposer" in this document refers to the body or group that is proposing the new school.

THE EDUCATION ACT 2011

4. Section 37 of EA 2011 introduces Schedule 11, which makes a number of changes to the process for establishing new schools. In particular, it introduces new section 6A of EIA 2006 which sets out the academy/Free School presumption. It makes changes to the existing school competition arrangements (amended section 7 of EIA 2006) and removes the need for local authorities and other proposers to seek the Secretary of State's consent before publishing proposals for certain types of new maintained schools (amended sections 10 and 11 of EIA 2006).

ACADEMY/FREE SCHOOL PRESUMPTION (under section 6A of EIA 2006)

5. Flow chart A at Annex A of this document sets out the revised process for establishing new school provision under the academy/Free School presumption (section 6A) and the new competition process (section 7).

6. Existing statutory requirements mean that local authorities, in their role as commissioners, must plan and secure sufficient schools for their area. Where a local authority identifies the need to establish a new school, new section 6A of EIA 2006 places the authority under a duty to seek proposals to establish an academy/Free School and to specify a date by which proposals must be submitted.

7. It will be for local authorities to decide how best to do this, how to consult on the proposed new school and with whom (e.g. local community, Diocese and any others affected by the proposals). They should be clear from their school place planning about the type (e.g. mainstream, special educational needs, alternative provision), age range, gender and capacity of the academy/Free School they wish to see established.

8. The local authority should take steps to ensure that groups or organisations that might be interested in establishing the new school are aware of the opportunity.

9. The local authority should notify the Department at the outset of its intention to seek proposals for a new academy/Free School and confirm the site it will make available and that it will provide all the capital funding needed to establish the school (as they were required to do for academies established through the previous school competition process). The Department will publish on its website (<http://www.education.gov.uk/schools/leadership/schoolorganisation>) details of those local authorities that are seeking to establish new schools, including links to their

websites. The Department will also inform the Independent Academies Association and New Schools Network, to alert potential proposers/sponsors to the new school's requirements.

10. Once the specified date for academy/Free School proposals has passed, the local authority should send the Secretary of State a notification setting out:

- the steps the authority has taken to seek proposals for an academy/Free School;
- copies of all proposals submitted and the authority's assessment of the proposals;
- confirmation that the authority will provide the required site and all the capital funding needed to establish the new school.

11. The local authority is responsible for meeting project development costs. For lead-in and setup costs, the Department will discuss with the local authority on a case by case basis to identify and agree the most appropriate mechanism to meet these. Until longer term funding arrangements are agreed, the expectation is that local authorities will contribute to these costs. A consultation document on funding reform was published on 26 March 2012.

12. The local authority should provide the Department with an assessment of the proposals it has received, based on the following criteria:

- the quality of the places being added into the system, based on the proposer's vision and educational plan;
- the capability and capacity of the proposer to deliver their proposal to time and on budget, based on their expertise and experience;
- value for money, confirming that the proposer considers that the costs of establishing the new academy/Free School can be met within the estimate of capital costs outlined by the local authority and, where they cannot be met within that estimate, an explanation of the reasons for the additional costs and how any shortfall will be met.

13. The local authority may state its preference, which the Secretary of State will take into consideration when deciding whether or not to enter into a Funding Agreement with any of the proposers.

14. The notification should be submitted to the Department for Education (school.organisationproposals@education.gsi.gov.uk).

15. Where a suitable proposer is identified, it will be for the proposer to work to establish the new academy/Free School with support from the local authority and the Department, as required. The local authority will continue to have an interest because of its duties to secure sufficient suitable schools.

OTHER IMPORTANT CHANGES

SCHOOL COMPETITIONS (under section 7 of EIA 2006)

16. If there is no suitable academy/Free School proposal, a statutory competition can be held with the consent of the Secretary of State (section 7(1)). This will not require a separate application for consent, since the Secretary of State will indicate to the local authority that a competition can be held, if he is satisfied that there is no suitable academy/Free School proposal.

17. Where consent to hold a competition is given, the local authority must follow the statutory process set out in Schedule 2 to the EIA 2006 (as amended by EA 2011) and the Establishment and Discontinuance Regulations.

18. Significant changes made by EA 2011 are:

- The removal of section 8 EIA 2006, which means that local authorities can no longer submit their own community or foundation school proposals in a competition).
- The new section 7A EIA 2006, which means that at any time before the date specified for the return of proposals, the Secretary of State may direct a local authority to withdraw a competition notice; or, a local authority may withdraw a competition notice with the Secretary of State's consent. This allows a competition to be ended where circumstances have changed e.g. where the new school is no longer needed or an alternative option is found, such as the enlargement of one or more existing schools instead.

19. Academy/Free School proposals and proposals for foundation (by proposers other than a local authority), voluntary controlled and voluntary aided schools, can be submitted into the competition by the deadline specified in the first notice.

COMPETITION – DECISION MAKING

20. The arrangements for deciding a competition have also changed. Since local authorities cannot enter their own school proposals, the Schools Adjudicator will no longer have a role in deciding competitions (unless the local authority is involved in the foundation of a proposed foundation school – paragraph 10 of Schedule 2 EIA 2006).

21. Important changes arising from EA 2011 are:

- Where an academy/Free School proposal is entered into a competition by the specified deadline, the Secretary of State must consider these proposals first to decide whether he is willing, in principle, to enter into a Funding Agreement with the academy/Free School proposer (paragraph 7A of Schedule 2 EIA 2006).
- If an academy/Free School proposal is deemed suitable, the competition ends and the proposer works with the Department and local authority to progress its proposal.

- If an academy/Free School proposal is not considered suitable, or no academy/Free School proposal is received, the competition continues and it is for the local authority to decide which maintained school proposal wins (paragraph 8 of Schedule 2 EIA 2006, subject to the local authority's involvement in any foundation school's foundation); there is no right of appeal.
- Where a competition does not identify a suitable academy/Free School or maintained school, the local authority may publish its own community or foundation school proposal under amended section 11 of EIA 2006; the Schools Adjudicator will be the decision maker in such cases.

ESTABLISHING A NEW MAINTAINED SCHOOL OUTSIDE OF A COMPETITION (under section 10 or section 11 of EIA 2006)

22. It is still possible to publish proposals for maintained schools in certain circumstances as set out below. Flow chart B at Annex A of this document sets out the statutory process for establishing a new maintained school under sections 10 and 11. Proposals under section 10 require Secretary of State consent.

MAINTAINED SCHOOL PROPOSALS – SPECIAL CASES (under section 11 of EIA 2006)

23. In the interests of reducing bureaucracy, the consent of the Secretary of State is no longer required to publish maintained school proposals in the circumstances outlined below.

24. Further detail about these special cases is given in section 11 of EIA 2006, as amended by EA 2011:

- proposals for a new voluntary aided school;
- proposals for a new community or foundation primary school that is to replace a maintained infant and a maintained junior school;
- proposals for a new school resulting from the reorganisation of existing faith schools in an area, including an existing faith school losing or changing its religious designation; or
- local authority proposals for a new foundation or community school, where suitable academy/Free School proposals have not been identified and a competition has been held but did not identify a suitable provider.

25. Proposals for former independent schools wishing to join the maintained sector and new local authority maintained nursery schools can still be published under section 11, as before.

26. In each case a statutory process, as set out in Schedule 2 to EIA 2006 and the Establishment and Discontinuance Regulations, must be undertaken. The Schools Adjudicator will decide local authority proposals, and local authorities will decide proposals from other proposers (except foundation school proposals where the local authority is involved as a member of the foundation (Trust), in which case the Adjudicator will be the decision maker).

OTHER NEW MAINTAINED SCHOOL PROPOSALS (under section 10 EIA 2006)

27. Where an academy/Free School approach is not considered to be appropriate and the proposal does not fall under section 11 special cases, it is still possible to apply to the Secretary of State for consent to publish proposals for replacement community schools, or brand new or replacement foundation or voluntary controlled maintained schools. Each application will be considered on its merits and the particular circumstances of the case, including whether the need for a new school might be better met by an academy/Free School. Where consent is given to publish new maintained school proposals, a statutory process must be followed, as set out in Schedule 2 to EIA 2006 and the Establishment and Discontinuance Regulations.

TRANSITIONAL PROVISIONS

28. Proposals published under sections 7 (where the first notice, inviting proposals for the new school, has been published), 10 or 11 of EIA 2006 prior to the commencement date of the relevant provisions of EA 2011 on 1 February 2012, must continue under the relevant legislation in place prior to the commencement of the new EA 2011 provisions, until they are concluded.

FURTHER SOURCES OF INFORMATION

Associated resources (external links):

- Education Act 2011
<http://www.legislation.gov.uk/ukpga/2011/21/contents/enacted>
- Education and Inspections Act 2006
<http://www.legislation.gov.uk/ukpga/2006/40/contents>
- Academies Act 2010 <http://www.legislation.gov.uk/ukpga/2010/32/contents>
- New Schools Network – An independent organisation devoted to improving education
<http://newschoolsnetwork.org/>
- Independent Academies Association – A national body which is regularly consulted by government and opposition on matters relating to educational change and development
<http://www.iaa.uk.net>

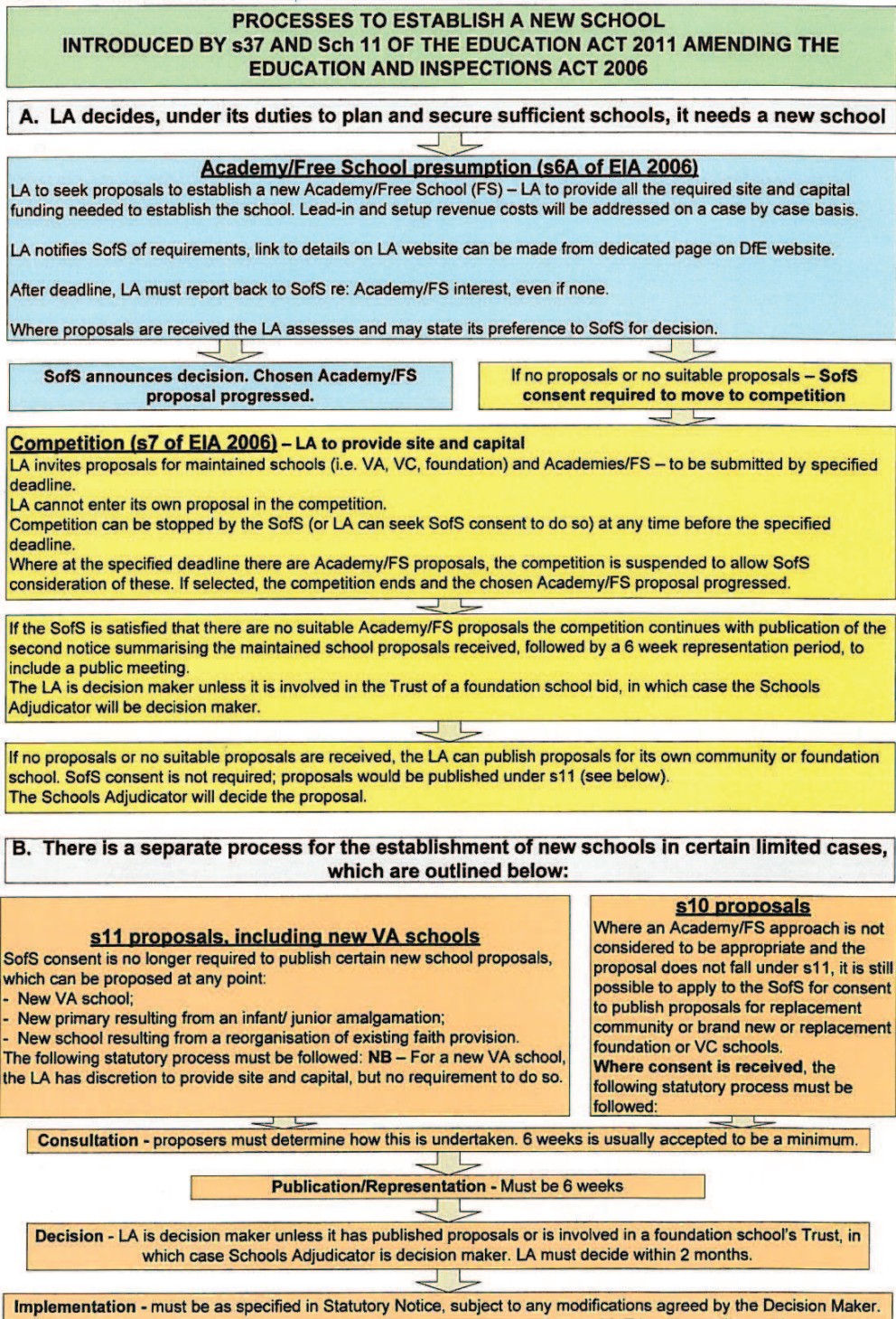
You may also be interested in (internal links):

- Keeling Schedule for section 37 (Schedule 11)
<http://www.education.gov.uk/aboutdfe/departmentalinformation/educationbill/a0077986/education-bill-keeling-schedules>
- School Organisation (Establishment and Discontinuance of Schools)(England) Regulations 2007

<http://www.education.gov.uk/schools/leadership/schoolorganisation/a00192027/school-organisation-decision-table>

- Free Schools
<http://www.education.gov.uk/schools/leadership/typesofschools/freeschools>
- Sponsored Academies
<http://www.education.gov.uk/schools/leadership/typesofschools/academies>
- University Technical Colleges and Studio Schools
<http://www.education.gov.uk/schools/leadership/typesofschools/technical>

Annex A – Flow Chart

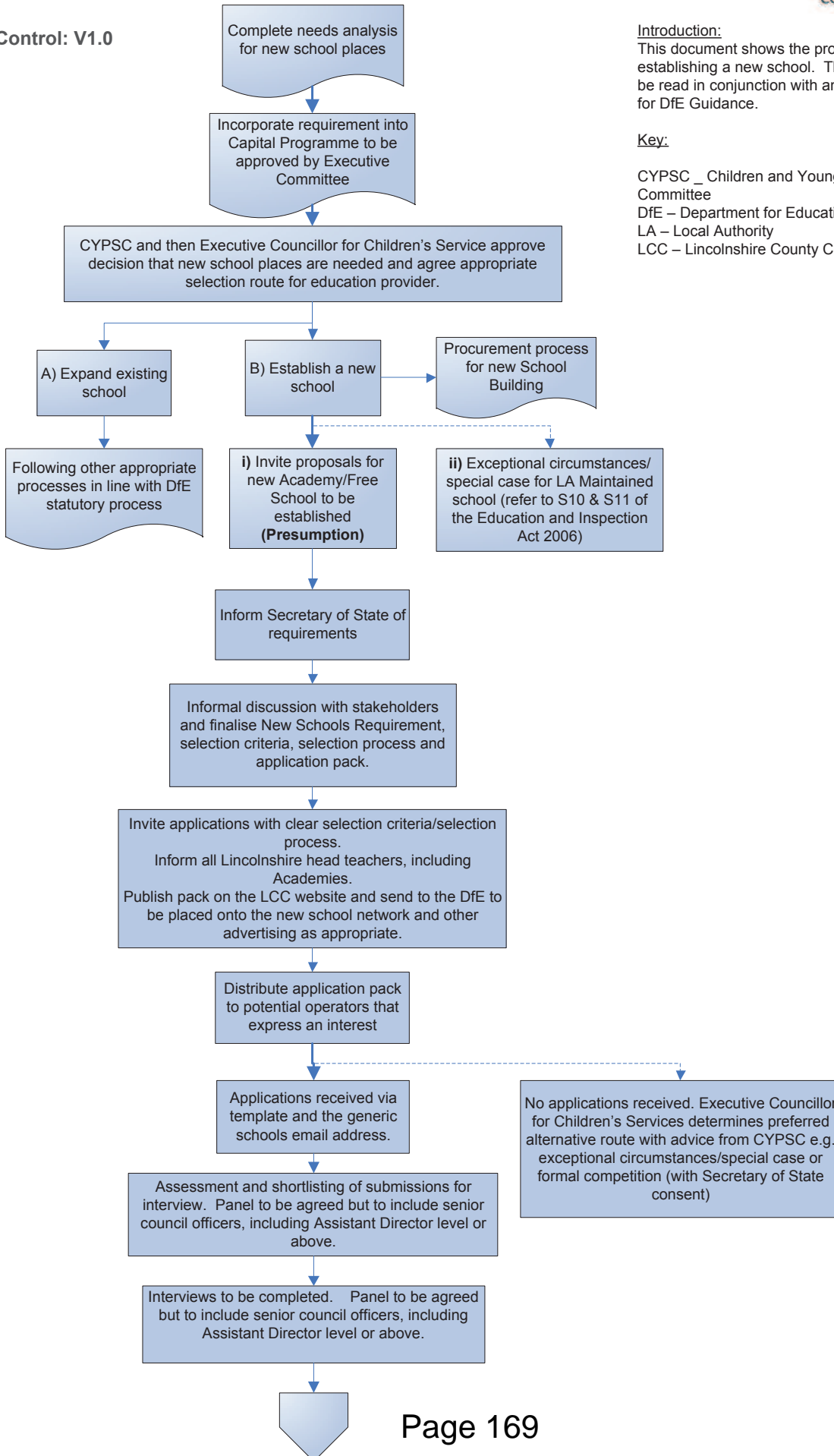


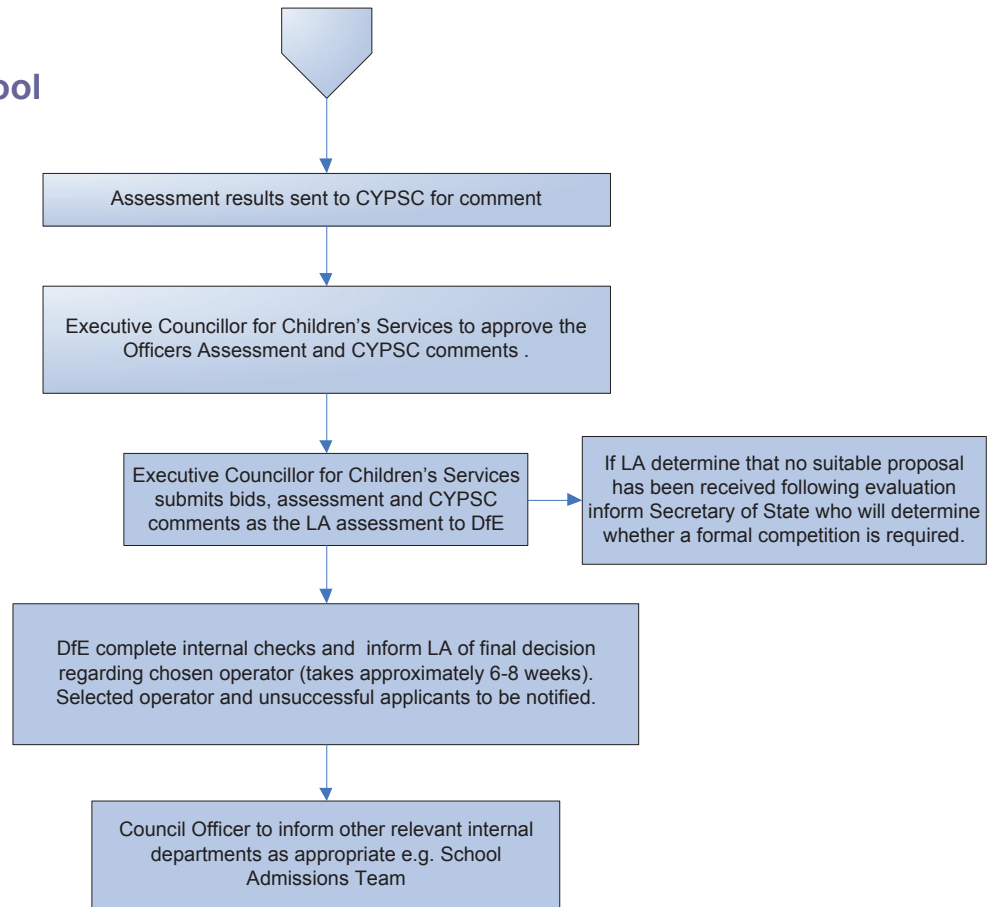
Children's Services
Establishing a New School Operator Procedure
 Page 1 of 2

Version Control: V1.0

Introduction:
 This document shows the process map for establishing a new school. This process should be read in conjunction with and is not a substitute for DfE Guidance.

Key:
 CYPSC _ Children and Young People's Scrutiny Committee
 DfE – Department for Education
 LA – Local Authority
 LCC – Lincolnshire County Council





APPENDIX C

Interested Parties list for proposed new primary Academy at Elsea Park in Bourne		
Interested Party	Name	Contact Details
Message on Int Comms		
Details on LCC website		
DfE for their website and to forward to IAA and NSN		
Details on George		
Leader of Council	Cllr Hill	cclrm.hill@lincolnshire.gov.uk
Executive Councillor	Cllr Mrs P Bradwell & Cllr A P Williams	cclrp.bradwell@lincolnshire.gov.uk , cclra.williams@lincolnshire.gov.uk
County Councillors	Sue Woolley	CllrS.Woolley@lincolnshire.gov.uk
	Charlotte Farquharson	CllrC.Farquharson@lincolnshire.gov.uk
Head of Strategy	Kevin Kendall	Kevin.Kendall@lincolnshire.gov.uk
LCC Chief Execs office- DMT/SMT/Management Board	Debbie Barnes and Meredith Teasdale	Debbie.barnes@lincolnshire.gov.uk , meredith.teasdale@lincolnshire.gov.uk
CfBT	Andy Breckon	Andy.breckon@cfbt.com , CPayne@cfbt.com
CfBT primary	Tim Culpin	tculpin@cfbt.com
CfBT secondary	Fred Morris, Keith Baty	kbaty@cfbt.com , fmorris@cfbt.com
CfBT	Steve Capper	scapper@cfbt.com
CfBT strategic projects incl SEN	Paul Snook	psnook@cfbt.com , sgregory@cfbt.com
CfBT CPD	Tim Lomas	tlomas@cfbt.com
School Administration	Adrian Flowers	Adrian.Flowers@lincolnshire.gov.uk
	David Robinson	david.robinson@lincolnshire.gov.uk
	John O'Connor	john.oconnor@lincolnshire.gov.uk
	Helen Clark	helen.clark@lincolnshire.gov.uk
	Lynn Yap	Lynn.Yap@lincolnshire.gov.uk
	Ruth Mayers	Ruth.Mayers@lincolnshire.gov.uk
	Steve Gamble	Steven.Gamble@lincolnshire.gov.uk
Exclusions	Phil Whitworth	phil.whitworth@lincolnshire.gov.uk
SEN Head of Service	Gary Nixon	gary.nixon@lincolnshire.gov.uk
SEN	Julia Andrews	Julia.Andrews@lincolnshire.gov.uk
Early years/extended provision	Sheridan Dodsworth	Sheridan.dodsworth@lincolnshire.gov.uk
	Julie Grindley	Julie.Grindley@lincolnshire.gov.uk
	Steph Douglas	steph.douglas@cfbt.com
Inclusion and Attendance Service	Jill Chandar-Nair	Jill.Chandar-Nair@lincolnshire.gov.uk
Safeguarding Children in Education	Nikki Neale	Nikki.Neale@lincolnshire.gov.uk
Finance LCC	Tony Warnock	tony.warnock@lincolnshire.gov.uk
	Carla Snowshall	Carla.Snowshall@lincolnshire.gov.uk
	Rachel Humphries	rachel.humphreys@lincolnshire.gov.uk
	Debra Williams	debra.williams@lincolnshire.gov.uk
Finance Mouchel	Eizabeth Bowes	Elizabeth.Bowes@mouchel-lincoln.com
	Jackie Allen	Jackie.Allen@mouchel-lincoln.com
	John Rossington	john.rossington@mouchel-lincoln.com
	Kevin Eaton	Kevin.Eaton@mouchel-lincoln.com
Governors Support	Hilary Wells	Hilary.Wells@lincolnshire.gov.uk
Performance Management	James Thomas	James.Thomas@lincolnshire.gov.uk
	David McWilliams	david.mcwilliams@lincolnshire.gov.uk
	Caroline Jackson	Caroline.Jackson@lincolnshire.gov.uk
	Marcus Needham	Marcus.Needham@lincolnshire.gov.uk
Commissioning	Justin Hackney	iustin.hackney@lincolnshire.gov.uk
	Andrew Mclean	andrew.mclean@lincolnshire.gov.uk
LCC Communications	John Giblin	john.giblin@lincolnshire.gov.uk
HR at LCC	Julie Jackson	julie.jackson@lincolnshire.gov.uk
	Penny Lee	Penny.lee@lincolnshire.gov.uk

APPENDIX C

	Mark Davies	markz.davies@mouchel-lincoln.com
Business support	Senta Martin	Senta.Martin@lincolnshire.gov.uk
	Teri Jones	teri.jones@lincolnshire.gov.uk
	Debbie Proctor	Debbie.Proctor@lincolnshire.gov.uk
	Ann Thompson	Ann.Thompson@lincolnshire.gov.uk
	Andrew Goulding	andrew.goulding@lincolnshire.gov.uk
Schools Library Service	Jill Trowsdale	Jill.Trowsdale@lincolnshire.gov.uk
Procurement Lincolnshire	Karley Allam	Karley.Allam@lincolnshire.gov.uk
CSC	Tanya Dempsey & Julia Key	Tanya.Dempsey@lincolnshire.gov.uk ; Julia.Key@lincolnshire.gov.uk
Property & Technology Management	Adrian Clarke	Adrian.Clarke@lincolnshire.gov.uk
	Anita Hodgson	Anita.Hodgson@lincolnshire.gov.uk
	Anna-Maria Edwards	Anna-Maria.Edwards@lincolnshire.gov.uk
	Brendan Pritchard	brendan.pritchard@mouchel-lincoln.com
	Claire Loasby	Claire.loasby@lincolnshire.gov.uk
	Danielle Garratt	Danielle.Garratt@lincolnshire.gov.uk
	Debbie Wilkinson	Debbie.wilkinson@lincolnshire.gov.uk
	Gerald Snaith	Gerald.Snaith@lincolnshire.gov.uk
	Hazel Bingham	Hazel.Bingham@lincolnshire.gov.uk
	Justin Ward	Justin.ward@lincolnshire.gov.uk
	Katie Gosling	Katie.Gosling@lincolnshire.gov.uk
	Laura Abbott	Laura.Abbott@lincolnshire.gov.uk
	Linda Duffield	Linda.duffield@lincolnshire.gov.uk
	Matt Clayton	matthew.clayton@lincolnshire.gov.uk
	Michael Watson	Michael.watson@lincolnshire.gov.uk
	Paul Holmes	Paul.holmes@lincolnshire.gov.uk
	Rosemary Eades	Rosemary.Eades@lincolnshire.gov.uk
	Steve Mason	Stephen.Mason@lincolnshire.gov.uk
	Terry Mason	Terry.mason@lincolnshire.gov.uk
	Tina Johnson	Tina.johnson@lincolnshire.gov.uk
	Alan Mackenzie	alan.mackenzie@lincolnshire.gov.uk
	Jez Bailey	jez.bailey@lincolnshire.gov.uk
	Gary Storey	Gary.Storey@lincolnshire.gov.uk
Chief Executive of South Kesteven District Council	Beverley Agass	b.agass@southkesteven.gov.uk
District councillors	Ask Jo Toomey at member services SKDC to distribute	j.toomey@southkesteven.gov.uk
Town Council	Bourne Town Council	clerk.bournetc@btconnect.com
MP	Nicholas Boles	nick.boles.mp@parliament.uk
Anglican Diocese	Jackie Waters-Dewhurst	jackie.wd@lincoln.anglican.org
R C Diocese	Ms Gail Neill	timzy.khurwal@nottingham-des.org.uk
Neighbouring LAs	Peterborough	emily.scott@peterborough.gov.uk
	Rutland	cexec@rutland.gov.uk
Libraries	Janet Strudwick, Library Support Service	janet.strudwick@lincolnshire.gov.uk
Primary Care Trust	Chief Exec of Lincs Primary Care Trust	john.mcivor@lpct.nhs.uk
Schools and Academies in Lincolnshire	all Headteachers	to be sent by the ecourier service
Gov Bodies of all schools and Academies in Lincolnshire	All Chairs of GBs	to be sent by the ecourier service
Expressions of Interest received before process commenced	Jan Cross	jandee@image-makers.co.uk
Builder of development at Elsea Park	Daniel Brown	daniel.browne@kier.co.uk

Children's Services
County Offices, Newland, Lincoln
LN1 1YQ
Tel: 01522 782030
Fax Number 01522 553257

1 October 2012

Proposal for a new mainstream primary school (age 4-11) in Bourne

The County Council has a statutory duty to provide sufficient school places for all Lincolnshire children. It has been well publicised in the national press that many local authorities across the country are having to find additional primary school places for unprecedented numbers of pupils in urban areas. Parts of Lincolnshire are experiencing similar pressures. This includes the town of Bourne where there is expected to be a significant shortfall of required places in the future if additional provision is not made available.

The main contributing factors for the increase in numbers are an increased birth rate and new housing developments, the largest being Elsea Park. This has resulted in sufficient demand to justify the need for a new local primary school to meet the needs of local families. The Local Authority (LA) is now in a position to seek planning permission and an operator for a new school.

The proposal is for a new 1FE (210 place) primary school/academy located within the Elsea Park development on a site designated for use as a primary school as proposed within the plans for this residential area which is still under construction. It is proposed to open with a Reception intake only, on a phased basis from September 2014.

The LA is finalising arrangements regarding the site and will manage the process and capital building projects up to completion, working closely with the new operator in the later stages of the project to determine final internal fixtures, fittings and décor. The LA will fund the project and the design will be based on a national template to achieve maximum cost efficiency and to minimise build time in line with the James Review. Under the Education Act 2011 there is a presumption that any new school will be an academy and not LA maintained so the new provision for Bourne will be an academy. Any interested potential operator or sponsor should request an application pack by emailing provisionplanning@lincolnshire.gov.uk or writing to 'Property and Technology Management' at the address above. All applications must be completed and returned by 16 November 2012. The LA will carry out an assessment of all applications received and has the option to select a preferred sponsor for recommendation to the Secretary of State who is the decision maker regarding the selection of the operator.

The LA would also like to take this opportunity to assure you that a new academy in this area should have minimal effect on the numbers on roll at other nearby schools. There is expected to be sufficient long term demand for places to sustain all existing schools and academies in addition to the proposed new academy. The LA would welcome discussion with any school, academy or interested party that would consider being part of this exciting opportunity in Bourne.

I look forward to hearing from you in due course. If you have any questions regarding the proposal or the process then please do not hesitate to contact me.

Yours sincerely



Matt Clayton
School Organisation Planning Manager
Email matthew.clayton@lincolnshire.gov.uk
Direct Dial 01522 553535

New School
Sponsor Proposal
Bourne Elsea Park Primary
Academy
Ref (for office use only)

Issue Date: 1 October 2012

Return Date: 16 November 2012

Matt Clayton
Lincolnshire County Council,
County Offices
Lincoln,
LN1 1YQ

Tel 01522 553535
Email matthew.clayton@lincolnshire.gov.uk

CONTENTS

Section Number	Description	Page Number
1	Preamble	3
2	New School Requirements	10
3	Proposer Responses – Business Information	18
4	Proposer Responses – Working Methods	24
5	Form of Proposal	26
6	Freedom of Information Disclosure Form	27
7	Proposer Checklist	28
8	Appendix One – Evaluation Matrix	29
9	Appendix Two – Evaluation Record Sheet	30

SECTION 1 – PREAMBLE

1 GENERAL REQUIREMENTS

- 1.1 Proposals are invited for the running of a new primary Academy in Bourne, Lincolnshire on the Elsea Park development.
- 1.2 The Council's detailed requirements are defined in the New School Requirement document at Section 2.
- 1.3 Proposals must be submitted in accordance with the instructions set out in this document.

2 BACKGROUND

- 2.1 The County Council has a statutory duty to provide sufficient school places for all Lincolnshire children. It has been well publicised in the national press that many local authorities across the country are having to find additional primary school places for unprecedented numbers of pupils in urban areas. Parts of Lincolnshire are experiencing similar pressures. This includes the town of Bourne where there is expected to be a significant shortfall of required places in the future if additional provision is not made available.
- 2.2 The main contributing factors for the increase in numbers are an increased birth rate and new housing developments, the largest being Elsea Park. This has resulted in sufficient demand to justify the need for a new local primary school to meet the needs of local families. The Local Authority (LA) is now in a position to seek planning permission and an operator for a new school.
- 2.3 The proposal is for a new 1FE (210 place) primary school/academy located within the Elsea Park development on a site designated for use as a primary school as proposed within the plans for this residential area which is still under construction. It is proposed to open with a Reception intake only, on a phased basis from September 2014.

3 TIMETABLE

- 3.1 The following time-line is intended to be followed:

1	Sponsor Proposal documentation Issued	[1 October 2012]
2	Deadline for Proposals	[5.00pm 16 November 2012]
3	Evaluation of Proposals	[19/11/12 – 14/12/12]
4	Interviews / Presentations	[17/12/2012 – 17/01/2013]
5	Proposals and evaluation assessment Referred to DfE	[22 March 2013]
6	DfE Inform the Council of their Decision	Within 6-8 weeks
7	Announcement of Successful Operator	[to be made once confirmation received from DfE]

- 3.2 Please note the Council reserves the right to amend this time-table and steps 3, 4, 5, 6 and 7 and are provided for indicative purposes only. Following submission of written proposals, proposers may be asked to make a presentation to the evaluation panel. This will help to clarify any points arising from the written proposals and/or take the format of a given scenario which will form part of the evaluation of proposals. Actual dates for presentations will be agreed with proposers in due course and will be held within Lincolnshire. The Interviews / presentation may or may not be held depending on the outcome of the initial evaluation.
- 3.3 Throughout the evaluation process, the council reserves the right to seek clarifications from proposers, where this is considered necessary to achieve a complete understanding of the proposal received. In any event, should the evaluation panel, in its reasonable judgement, identify a fundamental failing or weakness in any proposal then that proposal may, regardless of its other merits, be excluded from further consideration although the DFE will still be sent the proposal.

4 PROPOSALS AND ACCOMPANYING DOCUMENTS

- 4.1 Proposal documentation may vary in detail, but we will:
- avoid over specifying a requirement,
 - invite a sufficient number of proposers to ensure fair competition, but remove barriers to participation by small proposers without discriminating against larger proposers
 - provide clear documentation
 - give all proposers equal opportunity
 - provide feedback to proposers
- 4.2 Proposals must be submitted on this Proposal Document, in Word format (unless otherwise specified), which must be duly completed and signed where appropriate. These include the:
- (a) Proposer Responses,
 - (b) Form of Proposal,
 - (d) Freedom of Information Disclosure Form.
- 4.3 Please answer every question as fully as possible. Please do not assume that the evaluators know about your organisation or the work that you do. Many new school opportunities generate a great deal of interest from potential proposers, so please ensure that you complete the documentation as requested. All figures should be in full, i.e. £3,500,000 not £3.5 million.

5 SIGNATURES

- 5.1 Where required, the Proposal must be signed:
- (a) where the Proposer is an individual, by that individual; OR
 - (b) where the Proposer is a partnership, by two duly authorised partners; OR

(c) where the Proposer is a limited company, by a director duly authorised for such purposes.

5.2 You may submit electronic or typed signatures. You may be requested at a later date to resign all declarations with an original signature.

6 SUBMISSION OF PROPOSALS

6.1 This proposal should be submitted via email to:

The Property and Technology Management Team

Organisation: Lincolnshire County Council

Email: provisionplanning@lincolnshire.gov.uk

No later than: 5.00pm on Friday 16 November 2012

6.2 The proposer's attention is specifically drawn to the date and time for receipt of proposals and no submission after the closing date and time will be considered.

7 FREEDOM OF INFORMATION

7.1 Information in relation to this proposal may be made available on demand in accordance with the requirements of the Freedom of Information Act 2000.

7.2 Proposers should state on the form at Section 6 if any of the information supplied by them is confidential or commercially sensitive or should not be disclosed in response to a request for information under the Act. Proposers should state why they consider the information to be confidential or commercially sensitive and for how long.

7.3 This will not guarantee that the information will not be disclosed but will be examined in the light of the exemptions provided in the Act.

8 NON-EVALUATION OF PROPOSAL

8.1 Any proposal submitted by a proposer in respect of which the proposer:

(a) enters into any agreement with any other person that such other person shall refrain from submitting a proposal or shall limit or restrict the proposal; or

(b) offers or agrees to pay or does pay or give any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having or causing or having caused to be done in relation to any other proposer or any other person's proposed proposal any act or omission; or

(c) in connection with the award of the Contract commits an offence under the Prevention of Corruption Acts 1889-1916 or gives any fee or reward the

receipt of which is an offence under Sub-Section (2) of Section 117 of the Local Government Act 1972;

- (d) has directly or indirectly canvassed any member or official of the Council concerning the acceptance of any proposal or who has directly or indirectly obtained or attempted to obtain information from any such member of official concerning any other proposer or proposal submitted by any other proposer;

shall not be evaluated by the Council, provided always that such non-acceptance or rejection shall be without prejudice to any other civil remedies available to the Council or any criminal liability which such conduct by a proposer may attract. The proposal shall still be sent to the DFE.

9 NON-CONSIDERATION OF PROPOSAL

9.1 The Council may in its absolute discretion refrain from considering any proposal if:

- (a) it is not in accordance with the instructions in this document;
- (b) the proposer makes or attempts to make any variation or alteration to the terms of the proposal or the New School Requirements document except where a variation or alteration is invited or permitted in accordance with the terms of all or any of the proposal and the New School Requirements document; or
- (c) the proposer does not provide all the information required by the Council.

10 WEIGHTING CRITERIA AND EVALUATION OF PROPOSALS

10.1 An initial examination will be made to establish the completeness of submitted proposals. The Council reserves the right not to evaluate any proposal submission which is incomplete. All proposals shall still be sent to the DFE.

10.2 The proposer's written response to any Supporting Information required by the Council will be taken into account in the evaluation of competing proposals.

10.3 Based on the information provided by proposers within the proposal documentation, each proposal will be evaluated based on the following selection criteria. Proposals are scored out of a 100.

10.4 The Council will take into account and evaluate proposer responses and presentations (if applicable) based upon quality.

Selection Criteria

10.6 The Business Information section of this document is designed to assess proposers on the following grounds:

- Economic and financial standing
- Technical capacity and ability.

10.7 If the evaluators feel that a proposer is wholly incapable of meeting the requirements in regard to any section of the Business Information then the DfE will be informed of this as part of the Council's sharing of evaluations. Lincolnshire County Council reserve the right not to continue to evaluate any proposer from the process that they believe is not capable of meeting the requirements of the new school. The DfE will still be sent all proposals.

10.8 Proposers are advised that wherever reference is made to any external assessment body or external accreditation standard, such reference shall be deemed to include reference to any equivalent body or standard established in other member states of the European Union.

10.9 The scoring criteria and weightings and Evaluation Record Sheet are attached for your information at Appendix One and Appendix Two.

Quality – 100%

10.10 Proposers will be scored on their responses to the Proposer Business Information and Proposer Working Methods in Section 3 and Section 4 in relation to the requirements of the New School Requirements document. The weighting applied to each of the quality sub criteria is shown in the table below

Element-	Weighting
Quality:	100%:
Part B Professional Standing	Pass/Fail
Part B (II) Professional Standing	Pass/Fail
Part C Finance	Moderated and written evaluation to DFE
Part D Operating Performance	Moderated and written evaluation to DFE
Part E Safeguarding	Moderated and written evaluation to DFE
Part F Experience	Moderated and written evaluation to DFE
G1	15.00%
G2	15.00%
G3	7.50%
G4	7.50%
G5	7.50%
G6	7.50%
G7	7.50%
G8	7.50%
G9	7.50%
G10	7.50%

Interviews [If scored] Only if interviews are carried out will a weighting be applied. If the LA decide that an interview is not necessary then all other weightings will be increased accordingly (see Appendix 1)	10.00%
--	--------

10.11 The quality element of the proposal will be scored using the following scale of awarding marks between 0 and 5:

0	Completely unsatisfactory response – Nil response to question
1	Completely unsatisfactory response – Limited information or proposer would not have ability in delivering the required standard.
2	Unacceptable response – Proposer would only meet some of the requirements of the New School Requirement document some of the time.
3	Acceptable response – Proposer would be likely to meet basic standards but further work may be required to ensure standards are met consistently.
4	Good response – clearly indicating proposer has fully understood and can consistently apply and deliver all the requirements.
5	Excellent response – Comprehensive understanding of the requirements and demonstrates that they are likely to exceed the required standards.

10.12 Where presentations or interviews are requested these may be used to clarify and / or expand on proposers responses and no points are allocated. Instead, having scored the proposer on the basis of the written proposal received, the scores will be reviewed and revised if appropriate in the light of additional information and insights gained during those subsequent stages of evaluation.

10.13 Alternatively, presentations may form part of the evaluation criteria, which will be shown within the sub criteria weighting and will therefore be scored as part of the overall evaluation process.

10.14 The greatest overall mark will indicate the proposer that best meets the New School Requirements. A copy of the evaluation matrix can be found at Appendix One.

11 ACCEPTANCE OF PROPOSAL

11.1 Any acceptance of a proposal will be made by the Secretary of State.

12 INFORMATION, COSTS AND EXPENSES

12.1 The proposer is responsible for obtaining all information necessary for the preparation of its proposal and all costs expenses and liabilities incurred by the proposer in connection with the preparation and submission of the proposal will be borne by the proposer.

13 RESEARCH AND INVESTIGATION

- 13.1 The proposer will be deemed for all purposes connected with the proposal to have carried out all researches, investigations and enquiries which can reasonably be carried out and to have satisfied itself as to the nature, extent, and character of the requirements of the Specification, the extent of the materials and equipment which may be required and any other matter which may affect its proposal.
- 13.2 The proposer shall have no claim whatsoever against the Council in respect of such matters and in particular (but without limitation) neither the Council shall make any payments to the proposer save as expressly provided for in the New School Requirements and (save to the extent set out in the New School Requirements) no compensation or remuneration shall otherwise be payable by any Council to the proposer in respect of the scope of the specification being different from that envisaged by the proposer or otherwise. Information given in respect of current requirements is given as a guide and the Council makes no warranty and accepts no liability as to the actual value or volume of requirements of the proposer.

14 CONFIDENTIALITY

- 14.1 All documentation and information issued by the Council relating to the proposal shall be treated by the proposer as private and confidential for use only in connection with the proposal and shall not be disclosed in whole or in part to any third party without the prior written consent of the Council.

15 PROPOSER'S WARRANTIES

- 15.1 In submitting a proposal the proposer warrants and represents that:
- (a) all information, representations and other matters of fact communicated (whether in writing or otherwise) to the Council by the proposer or its employees in connection with or arising out of the proposal are true, complete and accurate in all respects;
 - (b) it had made its own investigations and research, and has satisfied itself in respect of all matters relating to the proposal and the New School Requirements and that it has not submitted the proposal in reliance upon any information, representations or assumptions (whether made orally, in writing or otherwise) which may have been made by the Council;
 - (c) it has full power and authority to enter the proposal and will if requested produce evidence of such to the Council;
 - (d) it is of sound financial standing and the proposer and its partners, officers and employees are not aware of any circumstances (other than such circumstances as may be disclosed in the accounts or other financial statements of the proposer) which may adversely affect such financial standing in the future.

SECTION 2 – NEW SCHOOL REQUIREMENTS

Section 1 - Background, Context and Policies and Procedures

1.1 Introduction and Context

Children and Young People's Plan

The Children and Young People's Plan sets the priorities for how we can contribute to make Lincolnshire a better place for Children and Young People.

Lincolnshire's Principles for Children and Young People are;

- Early Intervention & Prevention
- Safeguarding & Best Start in Life
- Aspiration & Wellbeing
- Learning & Achievement
- Best use of Resources

For further information about services for Children and Young People in Lincolnshire, including the full Children and Young Peoples Plan please see the [lincolnshirechildren.net website](http://lincolnshirechildren.net).

Please consult the Council [website](#) and the most recent Joint Strategic Needs Assessment (JSNA) and for local, up to date, demographic information.

Proposers are expected to have a good knowledge of Lincolnshire and its demographics.

1.2 Legislation, Policies and Procedures

Lincolnshire County Council (LCC) is responsible for school place planning. Where a Local Authority (LA) identifies the need to establish a new school, the Education Act (2011) introduced a presumption that all new schools will be Academies/Free Schools. It also places the authority under a duty to seek proposals to establish an Academy/Free School and to specify a date by which proposals must be submitted. As this new school will be an Academy or Free School, the successful sponsor will need to enter into a revenue funding agreement with the Secretary of State for Education.

It is important to note that whilst the LA may choose to state a preference in respect of which application it would wish to see implemented, it is the Secretary of State for Education who will make the final decision and select the successful sponsor.

The Proposer needs to comply with all relevant legislation relating to the development of a new school.

This includes, but is not exhaustive to

- The Children Act 2004
- Health and Safety at Work Legislation
- Data Protection
- Police and Justice Act 2006
- Education and Inspection Act 2006
- Education Act 2011

Proposers are to have sufficient written policies, procedures and codes of practice in place to ensure that instruction and guidance for the operator's staff are available in relation to the functions and activities described in the specification.

The policies, procedures and codes of practice must be accessible at all times by staff and must be readily available to relevant stakeholders.

Policies and procedures and codes of practice should include:

- Equalities standards
- Recruitment and selection policy
- Staff induction, appraisal and staff training and development
- A code of conduct for staff
- A robust code of practice concerning staff rota systems including cover for foreseen and unforeseen staff absence
- Contingency and business continuity arrangements
- Risk assessment and management
- Complaints by users and by staff
- Safeguarding Children/Child Protection
- Protecting Vulnerable Adults

- Whistle blowing
- Confidentiality and Data Protection
- Health and Safety
- Anti-bullying
- Grievance

1.3 Safeguarding

The Council has multi-agency policy and procedures to protect children and vulnerable adults from abuse. These policies and procedures should be followed by the Proposer. The Proposer shall prepare its own internal guidelines to protect children from abuse that are consistent with the multi-agency policy and procedures.

The Proposer shall make the necessary arrangements to ensure compliance with Section 11 of the Children Act 2004 and the duty to safeguard and promote the welfare of children in delivery of all aspects of the service. Proposers must demonstrate compliance via a self-assessment process. The Council currently recommend the Lincolnshire Local Safeguarding Children's Board (LSCB) Toolkit or the [Safe Network](#) self-assessment toolkit. Compliance must be demonstrated on an annual basis.

1.4 Equalities and Diversity

The general population of Lincolnshire is diverse in terms of faith, ethnicity, disability, culture, language, gender and sexuality. Proposers are expected to develop a diverse workforce and promote sensitive and appropriate service delivery. The Proposers will be expected to demonstrate a commitment to ensuring that their services meet the diverse needs of their target client group.

Section 2 – Service Summary

2.1. Service Overview

The school is proposed to serve Elsea Park, a long term development of more than 1600 homes in Bourne that is approximately halfway complete after ten years of development.

Building started on the Elsea Park Development in late 2001 with planning approved for 1600+ dwellings. The work is expected to take at least another 14 years to complete, depending on market conditions, and there are not expected to be new housing allocations for Bourne prior to 2026 above the 1650 with existing outline consent as at March 2011 for the whole town, including Elsea Park.

In 2001, under Section 106 (S.106) of the Town and Country Planning Act 1990, LA officers negotiated a site and funding for a primary school to be provided by the developer to the relevant specification at the time their development started. This specification has now been superseded several times and legal advice to LCC says it cannot accept direct provision by the developer due to EU Procurement rules on public works. Therefore the proposal is that the developer provides the site and a capital contribution and LCC procures the school. This requires the developer and LCC to agree details and then formally vary the existing S.106 agreement by way of an application to South Kesteven District Council as the Local Planning Authority.

The additional primary school is intended to serve the growing community of Elsea Park. The new school will not replace any existing schools and has been delayed in coming forward due to the slowdown in the housing market and a previous dip in numbers across Bourne and the potential harm it could have had on existing schools by creating an oversupply.

It is envisaged that this additional primary school provision would open in stages to match the rate of development and pupil growth in Bourne. Projections are based on the calculation of approximately 20 primary age children per 100 houses. There are expected to be 320 primary pupils residing on site at Elsea Park eventually but many have been able to gain a place at existing schools so initially only 210 places are proposed, with the scope for expansion if required in the future.

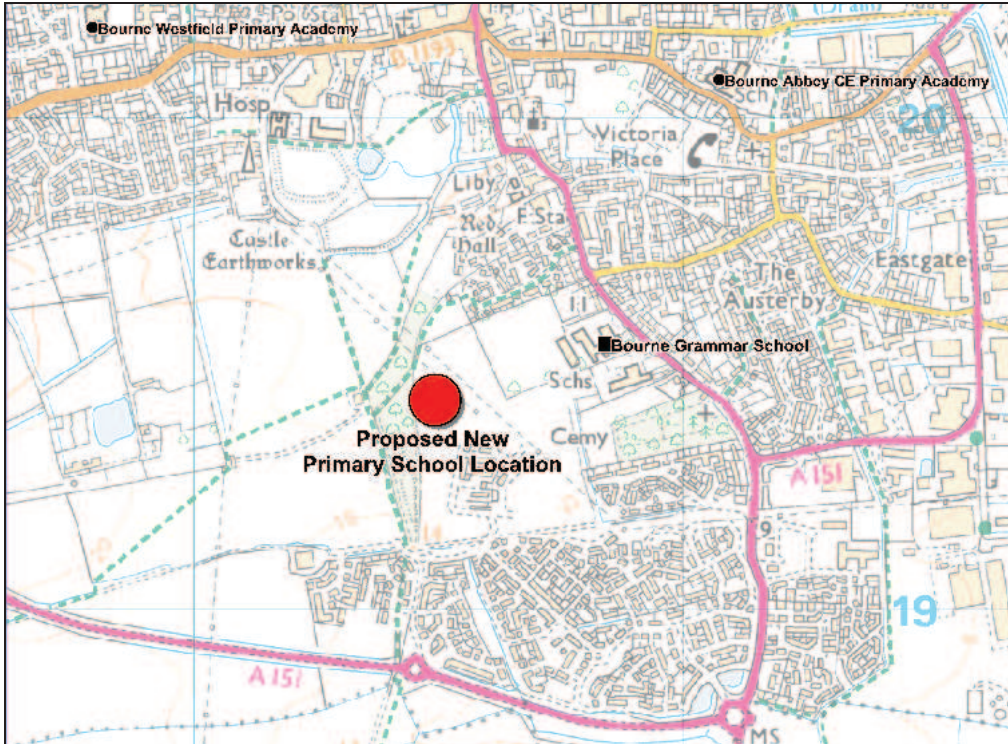
The provision of childcare will not form part of the prerequisites for proposers for the school, however new school operators will be asked to provide evidence in their submissions of commitment towards the provision of Early Years provision on the school site.

Section 3 – Services to be Provided

3.1. Service Deliverables

Location of the Site

The detailed location and boundaries are subject to final agreement with the developer but are shown approximately on the original S.106. The total area is approximately 1.8ha on a single site. The proposed location of the site is shown on the map below. It is expected legal matters will be concluded in Autumn 2012 and the site is not expected to move from this location.



Accessibility of the Site

The new school will operate on a single site accessed from a service road.

The site will be easily accessible by all and the building project will, as a minimum, address relevant building regulations in order to meet the needs of pupils, visitors and staff.

Transport

No specific transport arrangements are deemed necessary given the close proximity of the site to children's homes.

The LA will actively support the new school in encouraging safe travel to school including walking and cycling.

Tenure

The Tenure will depend on the outcome of the selection process and status of the school but LCC will hold the freehold interest of the site designated for the new school and a lease will be created by way of an Academy Transfer based on the 125 year DfE model, as appropriate. The timing of the grant of any such interests will be directly dependant on transfer of ownership to the County Council under the Deed of Undertaking and any legal restrictions.

3.2. Timescales

It is proposed that the school should open from 1 September 2014 at the start of the autumn term, as this is generally the best opening time for a new school and fits with the LCC admissions process.

3.3. User Information

It is proposed to be a 1FE (210 place) age 4-11 mainstream primary academy/free school for boys and girls.

It is proposed that the new school will have a phased opening to provide 30 Reception places from September 2014 as follows:

- 30 places from 1 September 2014 (Reception)
- 60 places by 1 September 2015 (Reception and Year 1)
- 90 places by 1 September 2016 (Reception to Year 2)
- 120 places by 1 September 2017 (Reception to Year 3)
- 150 places by 1 September 2018 (Reception to Year 4)
- 180 places by 1 September 2019 (Reception to Year 5)
- 210 places by 1 September 2020 (Reception to Year 6)

Potential operators will be expected to demonstrate how they will manage this phased opening as part of their proposal.

3.4. Extended Services

The LA expects the new school operator to collaborate and engage with other providers and local partners to develop extended services which meet the needs of local children, young people and families in a co-ordinated, holistic way and which can be accessed through all the partners in the locality

These services may include: access to high quality childcare, out of hours learning activities, parenting support and community access to appropriate facilities which may include sports and arts facilities, adult learning and ICT provision.

Potential new school operators will be asked to provide evidence in their submissions of their commitment towards the provision on the school site.

3.5. Financial Information

The capital costs of building the school will be met by the S.106 agreement and LA Basic Need funding. The management of the capital build project will be handled by the LA. The S.106 agreement also provides the land on which the school is to be built.

3.6. Submission of Proposals

All proposals should be addressed to Lincolnshire County Council and submitted electronically to provisionplanning@lincolnshire.gov.uk by the deadline stated below using the application form provided.

3.7. Next Steps

The LA must receive proposals by 16 November 2012 as an electronic copy of all documentation.

Proposals for the new school will be judged against their ability to meet the following criteria as set out in the application form provided (which must be used to submit all applications):

1. Vision and educational experience (weighted by 2)
2. Capacity and capability (weighted by 2)
3. Supporting partnership working in Lincolnshire to achieve the objectives of the Children and Young People's Plan
4. Qualities and ideas that will impact on standards and school improvement
5. Diversity, parental choice and community engagement
6. What will differentiate your proposal from those of other proposers?
7. Admissions arrangements
8. Staffing the Academy/Free School and recruiting the governing body
9. Championing the needs of vulnerable children
10. Managing the opening of the new Academy/Free School

The LA will evaluate all applications received and may interview proposers if required. All applications received will be submitted to the DfE (Secretary of State for Education) along with details of the assessment carried out. The LA may choose to recommend a provider based on the overall assessment. The assessment process will be carried out by the LA before applications are submitted to the DfE. It is hoped the decision will be available from the DfE within 8 weeks of submission.

3.8. Explanatory Notes

Commencement of school term dates to be determined, in consultation with the provider, with the aim that it will be accordance with the annual consultation of term dates. The start of Term 1 usually falls within the first week of September.

The school will be built in one phase to provide up to 30 Reception places in 2014 and up to 210 places by 2020. The school could have variable numbers in each year, which would affect class organisation and may require mixed age classes.

The published admission number (PAN) is the total capacity of the school divided by the number of year groups to be accommodated. The proposed PAN for this school is 30.

SECTION 3 – PROPOSER RESPONSES: BUSINESS INFORMATION

Note – You may adjust the size of the following text boxes to suit your response.

Proposers are required to respond to the questions below. You may expand the sections provided or provide your responses on clearly cross referenced sheets. Please make sure that where you chose to cross reference, the responses are all submitted in a single word file so that they may be printed of together.

PART A – Company Details		
A1	Company Name:	
A2	Company Address and Post Code:	
A3	Registered address and Post Code if different from the above:	
A4	Company Registration number (if this applies):	
A5	Charities or other Registration number (if this applies). Please specify registering body:	
A6	Date of Registration: (if this applies)	
A7	Please state the nature of your organisation, e.g. public limited company, partnership, sole trader, etc:	
A8	Are you a small, medium or micro business?	Small / Medium / Micro
A9	Are you acting as the lead organisation for a consortium?	Yes/No
A10	If members of your consortium are likely to deliver a significant (over 50%) proportion of the requirement, give their company name(s) and address(es). Please provide this information in a separate annexe	
A11	If the Company is a member of a group of companies, give the name and address of the ultimate holding Company	
A12	Contact name for enquiries about this ITT:	
A13	Job Title:	
A14	Telephone number:	
A15	Fax number:	
A16	E-mail address:	
A17	Website address (if any):	

PART B – Professional Standing – Mandatory Pass		
B1	Has your organisation or any of its directors or any other person who has powers of representation, decision or control of the organisation been convicted of any of the following offences: NOTE: Responses to these questions will be assessed as PASS / FAIL. Only those applications achieving a PASS will be put forward for further evaluation.	
B1.1	Conspiracy	Yes / No
B1.2	Corruption	Yes / No
B1.3	Bribery	Yes / No
B1.4	Fraud	
	(i) The offence of cheating the Revenue	Yes / No
	(ii) The offence of conspiracy to defraud	Yes / No
	(iii) Fraud or theft	Yes / No
	(iv) Fraudulent trading	Yes / No
	(v) Defrauding HM Revenue & Customs	Yes / No
	(vi) An offence in connection with taxation in the European community	Yes / No
	(vii) Destroying defacing or concealing of documents or procuring the extension of a valuable security	Yes / No
	(viii) Money laundering	Yes / No
	(ix) Any other offence	Yes / No

PART B (II) – Professional Standing – Discretionary Pass *(see note below)		
B(II)1	Do any of the following apply to your organisation, or to (any of) the director(s) / partners / proprietor(s)? NOTE: Responses to these questions will be assessed as PASS / FAIL. Only those applications achieving a PASS will be put forward for further evaluation.	
B(II)1.1	Bankruptcy, insolvency, compulsory winding up, receivership, composition with creditors, or subject to relevant proceedings	Yes / No
B(II)1.2	A conviction (or convictions) for a criminal offence related to business or professional conduct	Yes / No
B(II)1.3	Legal or administrative finding of a commission of an act of grave misconduct in the course of business	Yes / No
B(II)1.4	Failure to fulfil obligations related to payment of social security contributions	Yes / No
B(II)1.5	Failure to fulfil obligations related to the payment of taxes	Yes / No
B(II)1.6	Failure to provide information required or providing inaccurate / misleading information when participating in a procurement exercise	Yes / No
B(II)1.7	Failure to obtain and maintain relevant licences or membership of an appropriate trading or professional organisation where required by law	Yes / No
B(II)1.8	Has personal or financial connection with an elected member or senior officer of the authority	Yes / No

B(II)1.9	If the answer to any of these is “Yes” please give brief details below, including what has been done to put things right.

* Where a ‘Yes’ response has been given to any question, information given in B(II)1.9 should clearly indicate the problem has been resolved and that steps have been taken to prevent its recurrence or that propriety can be maintained.

Financial Information

This section asks for some financial facts about your organisation (and the ultimate holding company if there is one). We will use this information to assess the financial position and stability of your organisation. **We do not require you to submit copies of accounts at this stage.** Where you are a new organisation and unable to supply certain information, please indicate ‘not able to supply’ against relevant responses.

Please note that a credit rating score will be obtained as part of the evaluation.

PART C – Financial Information		
C1	Are you registered for VAT? If so, please provide Registration number:	
C2	What are your current liabilities (including bank overdraft)? (If you are a consortium please state aggregated value)	£
C3	What is the value of your current assets? (If you are a consortium please state aggregated value)	£
C4	What is the value of your Stock / Inventory? (If you are a consortium please state aggregated value)	£..... for year ended --/--/----
C5	What is the value of your current Interest / Finance Charges? (If you are a consortium please state aggregated value)	£
C6	What was your Operating Profit in the last two financial years? (If you are a consortium please state aggregated value)	£..... for year ended --/--/---- £..... for year ended --/--/----
C7	What was your turnover in each of the last two financial years? (If you are a consortium please state aggregated value)	£..... for year ended --/--/-- £..... for year ended --/--/----
C8	What is the value of your current Reserves? (If you are a consortium please state aggregated value)	£
C9	What is the value of your available cash / credit? (If you are a consortium please state aggregated value)	£
C10	Please indicate if you are able to provide any of the following should they be required	
	<i>A copy of your audited accounts for the most recent two years (if this applies)</i>	Yes / No
	<i>A statement of your turnover, profit & loss account and cash flow for the most recent year of trading</i>	Yes / No

	<i>A statement of your cash flow forecast for the current year and a bank letter outlining the current cash and credit position</i>	Yes / No
	<i>Interim accounts showing your current financial position</i>	Yes / No
	<i>Alternative means of demonstrating financial status if trading for less than a year</i>	Yes / No
	If no please state the reason why not in no more than 100 words	
C11	If requested, would you be able to provide a banker's reference?	Yes / No
C12	Are your accounts externally audited?	Yes / No
	If "No" please state the reason why in no more than 100 words .	
C13	Has your organisation met the terms of its banking facilities and loan agreements (if any) during the past year?	Yes / No
	If "No" what were the reasons, and what has been done to put things right in no more than 150 words ?	
C14	Has your organisation met all its obligations to pay its creditors and staff during the past year?	Yes / No
	If "No" please explain why not in no more than 100 words :	

NB In accordance with the Companies Act 2006, small companies are exempt from providing audited accounts. To qualify as small, a company must meet **two** of the following criteria:

- The turnover in a financial year is not more than £5.6 million
- The balance sheet total for that year is not more than £2.8 million
- It has not more than 50 employees.
- If this is applicable, the applicant is required to provide accounting information comprising of a balance sheet and income statement in order to enable the Council to assess your firms financial viability. Please note that abbreviated accounts are not accessible

PART D – Operating Performance

D1	In the last three years, have:	
	You or your Company been removed as an operator of a school?	Yes / No
	Any schools that you have operated gone into special measures?	Yes / No
	If "Yes" please explain in no more than 150 words why.	

PART E – Safeguarding

E1	How does your organisation comply with the Protection of Vulnerable Adults and Section 11 of the Children Act 2004 for the Protection of Children? Word limit 250 words	

E2	Please provide a copy of your Safeguarding Children/Child Protection Policy and Vulnerable Adults Policy. Please note this section does not have a word limit.	
E3	In the last three years, has any finding of unlawful acts been made against any individual employed within your organisation or working voluntarily for your organisation? If “Yes” please provide details below.	Yes / No
E4	In the last three years, has your organisation been the subject of formal investigation under the Criminal Justice and Court Services Act? If “Yes” please provide details below.	Yes / No

PART F – Experience of the Company and References

F1	What are the main business activities of your organisation? (max 100 words)			
F2	Please provide brief details of your company’s previous experience in delivering the type of requirements under this proposal.			
F3	Please provide an overview of the range of services that the company supports that demonstrate your ability to deliver the New School Requirements.			
F4	Please detail your company and management structure.			
F5	How many staff does your organisation employ (including consortia members or sub-contractors where appropriate) in total and how many work in areas relevant to this proposal?			
F6	Please provide details of up to three contracts with either the public or private sector that your organisation has held in the last three years that are relevant to the Authority’s requirement. (The customer contact should be prepared to speak to the Council if we wish to contact them). Please ensure the email address is provided, as references will be requested electronically			
		Contract 1	Contract 2	Contract 3
	Customer Organisation (name): Website (if available)			
	Customer contact name, phone number and email			
	Date contract awarded:			

	Date contract completed:			
	Brief description of contract (max 100 words)			
	Value:			
If you cannot provide at least one reference, please briefly explain why (100 words max)				

SECTION 4 – PROPOSER RESPONSES – WORKING METHODS

PART G – Proposed Working Methods

Proposers are required to respond to the questions below. You may expand the areas provided or provide your responses on clearly cross referenced sheets. Please make sure that whatever option is chosen, the responses are all submitted in a single Word file so that they may be printed off altogether.

G1	<p>Vision and educational experience</p> <ul style="list-style-type: none"> - Detail your education vision and ethos for the new Academy/Free School - Demonstrate how you will narrow the gap between vulnerable children and young people and their less vulnerable peers and enable as many children as possible to reach their full potential - Include your policy on inclusion and exclusion and detail your approach to behaviour management - Detail your approach to pupil well-being and attendance and how they link to your education vision - Demonstrate the quality of places offered - Detail the educational plan and proposed curriculum and explain how you will ensure it is broad and balanced - Your aspirations for the achievement of pupils and for the Academy/Free School as a whole
G2	<p>Capacity and capability</p> <ul style="list-style-type: none"> - Demonstrate your ability to successfully manage schools - Give details of your ability and experience of running an Academy/Free School - Give details of how you will ensure children and young people are safeguarded - Give reference to your leadership and management experience - Evidence your ability to financially manage Academies/Free Schools, including your financial expertise
G3	<p>Supporting partnership working in Lincolnshire to achieve the objectives of the Children and Young People’s Plan</p> <ul style="list-style-type: none"> - Fully explain how you will develop partnerships with the Council, other Schools and Academies and other relevant stakeholders - Explain how partnership working will help achieve the objectives of the Children and Young People’s Plan and in particular improve the educational experience to enable pupils to reach their full potential - How will partnership working help to ensure children and young people are safeguarded from harm?
G4	<p>Qualities and ideas that will impact on standards and school improvement</p> <ul style="list-style-type: none"> - Detail specific qualities and ideas regarding how the approach of the Academy/Free School will help to raise the standard of education in the area - How will this contribute to school improvement? - Set out details of the experience that pupils will have at the new school, including how you will evaluate the achievement and performance of pupils and the Academy/Free School - How will the Academy/Free School support the transition to secondary

	<p>education (where applicable)?</p> <ul style="list-style-type: none"> - How will the Academy/Free School support pupils into further education, employment or training (where applicable)?
G5	<p>Diversity, parental choice and community engagement</p> <ul style="list-style-type: none"> - How will your submission enhance diversity and promote parental choice in the area? - Outline your understanding of the local community - Describe your plans for community engagement, including how sports provision will be maintained and enhanced - How will you promote good community relations?
G6	<p>What will differentiate your proposal from those of other proposers?</p> <ul style="list-style-type: none"> - Explain how the Academy/Free School will be distinctive in its vision and ethos
G7	<p>Admissions arrangements</p> <ul style="list-style-type: none"> - Describe the proposed admission arrangements, including over-subscriptions criteria for the Academy/Free School - If the Academy/Free School is proposed to have a religious character, show the extent to which priority places is proposed to be given to children of the Academy's/Free School's religion or religious denomination - How will children of other religious or non-religious denominations be considered?
G8	<p>Staffing the Academy/Free School and recruiting the governing body</p> <ul style="list-style-type: none"> - Provide an indicative staffing structure - How will staff be recruited to the Academy/Free School as the number of children at the school builds? - How will the recruitment of governors to the school be managed?
G9	<p>Championing the needs of vulnerable children</p> <ul style="list-style-type: none"> - What additional services will be provided to parents, pupils and the local community, particularly for vulnerable children and their families? - How do you propose to make the Academy/Free School attractive to pupils of different backgrounds and abilities, including pupils from deprived or disadvantaged families?
G10	<p>Managing the opening of the new Academy/Free School</p> <ul style="list-style-type: none"> - Provide details of how you will work with other agencies to ensure that the necessary infrastructure and systems are in place for the opening of the new Academy/Free School - Give details of your experience of managing the opening and early operation of a new Academy/Free School

SECTION 5 – FORM OF PROPOSAL

Note: Refusal to give this declaration and undertaking means that your proposal will not be evaluated. All proposals will be sent to the DfE.

To Lincolnshire County Council

Having examined carefully and understood the New School Requirement and all other documentation issued by the Council in connection with the proposal for the Bourne Elsea Park Primary Academy

We:

Of:

hereby offer to operate the new school as set out in New School Requirement and other documents (if any).

I/We understand you will not pay any expenses incurred by us in connection with the preparation and submission of this proposal.

I/We declare that to the best of my/our knowledge the responses submitted in this proposal are correct and a true representation. I/We understand that the information will be used in the process to assess my/our organisation’s ability to deliver the requirement. I/We understand that the Authority may not evaluate this proposal if there is a failure to answer all relevant questions fully or if I provide false/misleading information. All proposals will be sent to the DfE.

Signature

Position held

Name and Address of Proposer

.....

.....

Dated

Note – Electronic signatures or typed names are acceptable. In the event that your organisation is chosen by the DfE you may be required to resign this form with an original signature.

SECTION 6 – FREEDOM OF INFORMATION DISCLOSURE FORM

Lincolnshire County Council

Freedom of Information Act 2000: Information Disclosure Form

The Council is committed to the principle of open government and may disclose, upon request, information that it considers to be in the public interest to disclose.

Please state below any information that you specifically do not wish the Council to disclose together with any timescale relating to this non-disclosure e.g. for first 6 months, lifetime of the contract etc.

Please note that the council may still need to disclose such information if necessary to comply with its obligations under the Act.

I agree that information relating to this proposal may be disclosed, save for the information specified below which we consider to be commercially confidential:

Signature

Position held

Name and Address of Proposer

.....

.....

Dated

Note – You may adjust the size of the text boxes to suit your response.

Signature	
Name	
Organisation	
Date	

Information not for Disclosure	Reason for Non-Disclosure	Timescale

Note – Electronic signatures or typed names are acceptable. In the event that your organisation is selected by the DfE you may be required to resign this form with an original signature.

SECTION 7 – PROPOSER CHECKLIST

Proposers should ensure that they have completed the following sections before returning their responses:

SECTION HEADING	COMPLETED?
Section 3 – Proposer Responses - Business Information (please include a copy of your Safeguarding Children/Child Protection Policy and Vulnerable Adults Policy)	<input type="checkbox"/>
Section 4 – Proposer Responses – Working Methods (please include a copy of your Inclusion/Exclusion Policy)	<input type="checkbox"/>
Section 5 – Form of Proposal	<input type="checkbox"/>
Section 6 – Freedom of Information Disclosure Form	<input type="checkbox"/>

It is important that all sections are completed as failure to do so may result in your proposals not being evaluated.

Proposers who do not wish to offer the requirement following submission of a proposal are requested to advise the Council's named contact as soon as possible.

SECTION 8 – APPENDIX ONE – EVALUATION MATRIX

Establishment of New Schools

Topic	Question	Percentage of Total Score (no interview)	Percentage of Total Score (with interview)
Topic 1			
	1	16.67	15.00
	2	16.67	15.00
	3	8.33	7.50
	4	8.33	7.50
	5	8.33	7.50
	6	8.33	7.50
	7	8.33	7.50
	8	8.33	7.50
	9	8.33	7.50
	10	8.33	7.50
	Interview (if required)	-	10.00
Overall Percentage Achieved		100	100

SECTION 9 – APPENDIX TWO– EVALUATION RECORD SHEET

Establishing a New Academy/Free School

EVALUATION RECORD SHEET

Name of Proposer:.....

Name of Evaluator:.....

Signature:.....

Date:.....

- A panel of officers will be evaluating how well the proposer has answered the questions in their submission
- Section B – is a pass/fail criteria
- Sections C, D, E and F – The information will be used to moderate the method statements
- Section G, Method Statements - Each officer will score each question on the basis of the response given, and will score on a scale of 0-5 (*0 being not answered, 1 being poor and 5 being excellent*).

BUSINESS INFORMATION

B	Professional Standing
Evaluator Comments (if any) 	

C	Financial Information
<p>Evaluator Comments (if any), please attach the credit rating report from Finance and ensure they comment on whether the proposer is assessed as financially viable, not financially viable or if the information provided has meant financial viability is unable to be determined</p> <p>.....</p> <p>.....</p> <p>.....</p>	

D	Operating Performance
<p>Evaluator Comments (if any)</p> <p>.....</p> <p>.....</p> <p>.....</p>	

E	Safeguarding
<p>Evaluator Comments (if any)</p> <p>.....</p> <p>.....</p> <p>.....</p>	

F	Experience of the Company and References
Evaluator Comments (if any) 	

METHOD STATEMENTS

HOW WELL HAS THE SUPPLIER RESPONDED TO THE FOLLOWING QUESTIONS (0-5)?

G1	Vision and educational experience
Evaluator Comments (if any) 	
SCORE:	

G2	Capacity and Capability
Evaluator Comments (if any) 	
SCORE:	

G3	Supporting partnership working in Lincolnshire to achieve the objectives of the Children and Young People's Plan
Evaluator Comments (if any)	
SCORE:	

Q4	Qualities and ideas that will impact on standards and school improvement
Evaluator Comments (if any)	
SCORE:	

G5	Diversity, Parental Choice and community engagement
Evaluator Comments (if any)	
SCORE:	

G6	What will differentiate your proposal from those of other proposers?
<p>Evaluator Comments (if any)</p> <p>.....</p> <p>.....</p> <p>.....</p>	
SCORE:	

G7	Admissions arrangements
<p>Evaluator Comments (if any)</p> <p>.....</p> <p>.....</p> <p>.....</p>	
SCORE:	

G8	Staffing the Academy/Free School and recruiting the governing body
<p>Evaluator Comments (if any)</p> <p>.....</p> <p>.....</p> <p>.....</p>	
SCORE:	

G9	Championing the needs of vulnerable children
Evaluator Comments (if any) 	
SCORE:	

G10	Managing the opening of the new Academy/Free School
Evaluator Comments (if any) 	
SCORE:	

APPENDIX F

SCORING MECHANISM

Each criterion G1 to G10 must be scored from 0 to 5 using the scale in the table below with G1 and G2 then being weighted x 2 as being the most important of the criteria :-

0	Completely unsatisfactory response – Nil response to question
1	Completely unsatisfactory response – Limited information or proposer would not have ability in delivering the required standard
2	Unacceptable response – Proposer would only meet some of the requirements of the New School Requirement document some of the time.
3	Acceptable response – Proposer would be likely to meet basic standards but further work may be required to ensure standards are met consistently
4	Good response – clearly indicating proposer has fully understood and can consistently apply and deliver all the requirements
5	Excellent response – Comprehensive understanding of the requirements and demonstrates that they are likely to exceed the required standards.

1. Vision and educational experience (weighted by 2)
2. Capacity and capability (weighted by 2)
3. Supporting partnership working in Lincolnshire to achieve the objectives of the Children and Young People's Plan
4. Qualities and ideas that will impact on standards and school improvement
5. Diversity, parental choice and community engagement
6. What will differentiate your proposal from those of other proposers?
7. Admissions arrangements
8. Staffing the Academy/Free School and recruiting the governing body
9. Championing the needs of vulnerable children
10. Managing the opening of the new Academy/Free School

APPENDIX H

Topic	Questions	Percentage of Total Score	Applicant A	Bourne Abbey
Method Statements				
	1	15	9.6	10.5
	2	15	7.2	9.9
	3	7.5	3.2	3.5
	4	7.5	2.7	5.1
	5	7.5	4.4	6.3
	6	7.5	4.5	5.1
	7	7.5	4.5	4.5
	8	7.5	3.2	5.3
	9	7.5	4.5	5.3
	10	7.5	4.7	4.7
		Sub-Total	48.5	60.2
	11	3.333333333	3.0	3.1
	12	1.333333333	1.0	0.9
	13	1.333333333	0.8	1.0
	14	1.333333333	0.9	1.1
	15	1.333333333	1.1	0.7
	16	1.333333333	1.1	1.0
		Sub-Total	7.9	7.8
Overall Percentage Achieved (not including price)			56.4	68.0

APPENDIX I

Process to select an operator for a new Primary Academy in Bourne - Presentations and Questions on January 9th

Title of presentation

"If we visited the Academy in five years time please explain to us what would make the Academy special and stand out from other schools/Academies?"

Questions to ask applicants

QUESTIONS 1 - 5
1. What evidence do you have to demonstrate that children will achieve their maximum potential in terms of attainment?
2. Please detail your understanding of 'vulnerable children' and how you will support them?
3. Please can you provide evidence of partnership and community working and expand on how you would operate in Bourne and engage with the local community?
4. What would you consider to be the weakest element of your application and how would you like to improve in that area?
5. What evidence can you give to assure the panel that you will be able to manage and open the school to admit pupils in September 2014?

Impact Analysis to Enable Informed Decisions						
Background Information						
Directorate	Assistant Director area	Service area	Lead officer	Person / people completing analysis	Date of workshop / meeting	Version
Please select	Children's Services	Property and Technology Management	Michelle Andrews	Linda Duffield	n/a	1
<p>Title of the policy / project / service being considered</p> <p>Proposal for a new primary academy (4-11) in Bourne</p>						
<p>General overview and description of the Proposal for a new primary academy (4-11) in Bourne</p> <p>The decision being considered is regarding the selection of the preferred operator for the new Academy</p>						
<p>The status of Proposal for a new primary academy (4-11) in Bourne</p> <p>New</p>						
<p>Timescales for implementation</p> <p>Consultation on the proposal for a new Academy commenced in October 2012 when a letter was sent to a wide range of potential interested parties including all mainstream operators of education in Lincolnshire. The deadline for applications was 16 November 2012 and a panel has subsequently evaluated and scored the applications to identify a suitable operator. Once the Executive Councillor has taken the decision regarding the assessment of the applications the final decision will be referred to the Secretary of State. The confirmed decision is anticipated in June 2013 to enable the opening of the Academy in September 2014.</p>						
Analysis						
<p>1. What is the current situation?</p> <p>The LA has a statutory duty to provide sufficient school places for all Lincolnshire children. Due to increased birth rate and new housing developments placing increased pressure on school capacity there is a need for a new primary school to meet demand. The LA has secured an appropriate site in Bourne and allocated capital funding so that the next step is to identify a suitable operator</p>						

<p>2. What are the drivers for change?</p>	<p>Political, social and economic - to ensure a suitable operator is identified in order to offer the highest quality of educational provision at the new academy, ensure as many children as possible achieve their full potential and enhance sustainability of provision within the local area.</p>
<p>3. What difference will we make?</p>	<p>To provide the highest quality of educational provision at the new academy and ensure as many children as possible achieve their full potential and enhance sustainability of provision for the local community in response to demographic pressures.</p>
<p>4. What are the assumptions about the benefits?</p>	<p>That a suitable operator for the new Academy will give the best opportunity to enhance the quality of provision at the new academy</p>
<p>5. How are you testing your assumptions about the benefits?</p>	<p>The selection of an operator for a new Primary Academy in Lincolnshire was first undertaken last year. Following this, a "lessons learned" process together with input from scrutiny and guidance published by the Department for Education enabled the process to be reviewed and revised. We believe that a robust and rigorous assessment process has been employed to enable optimum selection for the selection process in Bourne. The years that follow the opening of a new school will allow standards to be monitored and reviewed to ensure the expected quality of provision is in place.</p>
<p>6. What are the assumptions about any adverse impacts? Could it have a negative effect on anyone?</p>	<p>No A thorough and robust process has been followed to select an operator. The Bourne Abbey Church of England Academy application met all of the appropriate criteria and it was unanimously agreed by all panel members to recommend Bourne Abbey Church of England Primary Academy as the preferred operator. The final selection by the Secretary of State will be one from a suitable organisation with proven background in educational provision to the highest standard and also having sound financial backing with well resourced and experienced support teams.</p>
<p>6.1 Which groups/individuals could it have a negative impact on?</p>	

APPENDIX J

<p>6.2 How could it have a negative impact on these groups/individuals? Please refer to the list of protected characteristics to assist your answer</p>	
<p>7. How are you testing your assumptions about adverse impacts?</p>	<p>Not applicable</p>
<p>7.1 What further evidence do you need to gather?</p>	<p>Not applicable</p>
<p>8. Who are the stakeholders and how will they be affected?</p>	<p>Primary (those directly affected, either positively or negatively by the organisation's actions)</p> <p>Parents/carers and their children - see points 2 and 3 above in this Analysis section. Staff and Governors at the new Academy will also benefit from the support, knowledge, experience and expertise of the chosen operator</p>
<p>9. How are you assessing the risks and minimising adverse impacts?</p>	<p>Secondary (intermediaries, people or organisations who are indirectly affected by the organisation's actions)</p> <p>Local community - the selection of the best operator will also help to maximise the positive impact on the community.</p>
<p>10. What changes will the Council need to make as a result of introducing the policy / project / service etc?</p>	<p>Not applicable</p>
<p>10. What changes will the Council need to make as a result of introducing the policy / project / service etc?</p>	<p>There will be no changes to any LCC policy or procedures.</p>

<p>11. How will you undertake evaluation once the changes have been implemented?</p>	<p>Not applicable</p>		
<p>Further Details</p>			
<p>Are you handling personal data?</p>	<p>No</p>	<p>If yes, please give details</p>	
<p>How was this analysis undertaken? Facilitated workshop? Who attended?</p>	<p>An evaluation panel was set up which comprised the Assistant Director for Children's Services, a Lincolnshire County Councillor, a representative from the Children and Young People Scrutiny Committee, and 2 Headteachers from LA maintained Lincolnshire Primary schools. The panel was also supported by an independent advisor from Children's Commissioning and LA officers from Children's Services. Applications were scored by the panel at an assessment day in December 2012 and then further scored in January 2013 following the use of presentations and questions. The scores from this 2 stage process were then compiled to produce an overall score.</p>		
<p>Are you confident that everyone who should have been involved in producing this version of the Impact Analysis has been?</p>	<p>Yes</p>	<p>If No, who needs to be involved?</p>	
<p>If this is new, or requires a decision by Councillors to revise, has this impact analysis been included with the committee report?</p>	<p>Yes</p>	<p>If No, why?</p>	
<p>Actions required Including any actions that have been identified in this analysis for monitoring in the service area workplan?</p>	<p>No</p>	<p>Action Not applicable</p>	<p>Lead Officer Not applicable</p> <p>Timescale Not applicable</p>
<p>Signed off by</p>	<p>Michelle Andrews</p>		<p>Date 17-Apr-13</p>