



Borough of Poole

Draft Full Business Case

Hillbourne Masterplan

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2. DOCUMENT VERSION CONTROL

Version	Date	Amended By	Summary Of Change
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V.06	01.10.2018	Jason Moors	Amendments to planning feedback, amendments to key risks, minor amendments based on feedback from Strategic Programme Board.

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4. EXECUTIVE SUMMARY

4.1 Brief

The objective of the Hillbourne Masterplan is to accommodate Hillbourne Primary School in a single, fit for purpose building in order to improve educational outcomes for young people and address the serious condition issues identified in the existing buildings and mitigate the management issues that arise from this. Facilitating this solution enables the release of land for housing in line with the local plan.

4.2 Background and purpose of Full Business Case (FBC)

An Outline Business Case (OBC) for the Hillbourne Masterplan was agreed by the Strategic Programme Board in January 2018; this was agreed by Council as part of the Children's Services Capital Programme in March 2018.

The Strategic Programme Board concluded that there were a number of risks associated with doing nothing (the possibility of having to close the school due to condition issues; maintenance costs that exceed the condition allocation available; the risks of losing the land if the school is forced to convert to academy status) and discounted this option. It was agreed that the option of constructing a new build modular building in the middle of the site provided the best value for money and presented the least disruption to the school. It was also recommended that a bespoke 30 place pre-school be included in the proposed scheme to replace the accommodation for Twin Oaks Nursery that would be lost with the demolition of Waterloo Youth Centre. It was proposed that the remainder of the site will be disposed of under a Section 77 application to the Secretary of State to facilitate residential development. The receipts arising from this sale/development will be used to fund the construction of the new school. This recommendation was included in the OBC. A funding gap of about £2.5m was identified for this project at the OBC stage

The FBC was commissioned in order to investigate the recommended option for building a new 2FE Primary School and pre-school in more detail, including a developed design and accurate costings. As well as this, it was agreed that the document would look at plans for the layout of the housing plots on either side of the proposed new build school and provide a more accurate estimate as to the receipts that could be generated from the disposal of this land.

4.3 Summary of constraints

The site is subject to a number of constraints that have been taken into account during the design process. These include:

- Waterloo Youth Centre is situated on the site. A voluntary group provides youth activities from this building one evening a week during term time. It is proposed that a plan is developed with Hillbourne Primary School to deliver positive youth activities from the school premises after the demolition of Waterloo Youth Club.
- Twin Oaks Pre-school operates a 40 place early years provision from Waterloo Youth Club. It is proposed that this provision is relocated to a purpose built pre-school as part of the design.
- A substation is located on the site. It is proposed that this be relocated and upgraded in order to accommodate the configuration of the external spaces and the increased electricity needs of the housing development.

- A foul sewer runs through the site and strategic sewer runs across the eastern boundary. It is proposed that the foul sewer be redirected and the designs take the strategic sewer into account.
- There are a number of legal covenants, including a restriction to use the site for educational purposes. There are proposals to overturn these covenants, including submitting Section 77 approval to the Secretary of State for disposal of the surplus playing field land.
- There are a large number of mature trees on the site, which have a significant impact on the proposed residential areas. The designs have been drawn up to have minimal impact on these.
- A number of surveys were carried out on site to determine the archaeology, ecology, flood risk, ground conditions and topography. The results of these surveys have informed the designs.

4.4 Summary of school design

Cube Design, architects with significant experience of designing schools, were appointed to develop the school design. The proposed site area identified for Hillbourne Primary School is 16,250m². The guidelines set down by the DfE for the creation of a 2 form entry school identifies 2,072m² of accommodation. This is in line with “Building Schools of the Future” and PSBP2 design guidelines and toolkits. The proposals for the new build school give a floor area of 2,128 m², which also includes a pre-school for 34 children with an overall area of 147.5 m².

The Masterplan proposals incorporate car parking for the school with a total of 32 spaces, this includes 28 for the school itself and 4 visitor spaces, including 2 disabled spaces. There will be 2 additional spaces for the Pre-School parking, making a total of 34 spaces.

The design has been developed in consultation with the school to enable the best outcomes for pupils. The design is at RIBA stage 2 and contains details of materials, structure, M&E design, furniture, and sanitary ware. The areas are totally secure – the perimeter fence provides the first line of defence to the school for security.

4.5 Summary of housing design

Housing and Community worked with Poole Housing Partnership to appoint Kendall Kingscott to develop a design for the residential developments proposed on the surplus playing field land. After the submission of planning pre-application, it was indicated that design SK05 would be most acceptable to planning, although further discussions regarding the urban design of the scheme are needed before the formal submission of the planning application.

The scheme is for a mix of 41no. 2 bed 4 person units and 37no. 3 bed 5 person units. A sheltered accommodation block of apartments is also proposed. This will be a 3 storey block providing 25no. 1 bed flats. A shared lounge, office and utility space will be provided within this block. The residential units are a combination of terrace and semi detached dwellings to optimise density yet still retain amenity space for each dwelling. Parking is located adjacent to the units.

A decision is required regarding which housing model is used as it will have an affect on the number of affordable housing units and the amount of receipt generated. A table sets out the advantages and disadvantages of each option below. More details of the options can be found in **Appendix A3**.

Option	Advantage	Disadvantage
Option 1a	- Large amount of affordable housing provided	- Lower receipt generated

	- Would work in partnership with the strong social housing management presence already on the estate that could help with community cohesion	
Option 1b	- Large amount of affordable housing provided - Already has a strong social housing management presence on the estate that could help with community cohesion	- Lowest receipt generated
Option 2a	- Higher receipt generated	- Smaller number of affordable housing units
Option 2b	- Highest receipt generated	- Smaller number of affordable housing units

4.6 Affordability

Borough of Poole commissioned Gleeds Cost Management to use the survey information, architectural and technical design information to determine the costs for a new build Primary School and pre-school. The majority of the school is of modular construction, with the double height spaces (e.g. the hall) of traditional construction.

These costs for developing the school are estimated at £9,300,000. These costs have increased from the £8,589,000 presented at the Outline Business Case stage due a number of additional items that have been added based on the results of the extensive site surveys and design. For full cost details for the school please see **Appendix A1**.

The amount of receipts generated by the disposal of the surplus playing field land is affected by the housing model that Council choose to adopt. Full details of this are available at **Appendix A3**

A funding strategy has been developed in discussion with accountancy and can be found at **Appendix A2**.

4.7 Recommendations

Following the conclusions of the Full Business Case, recommendations have been included in the 30th October 2018 report to Cabinet.

4.8 Proposed Next Steps

If the Hillbourne Masterplan is approved, the following next steps will be undertaken:

1. A Section 77 application will be made to the secretary of state for the disposal of school playing field land.
2. Estates to make contact with the representatives of the Wimborne Estate in order to overturn the education covenant on the surplus playing field land.
3. Hold a community engagement event in consultation with Corporate Communications for parents and carers of pupils at Hillbourne Primary School and the local community to discuss the Masterplan.

4. Work in consultation with Strategic Procurement to draw up a procurement strategy for the Masterplan project.
5. Work with strategic planning on the urban design of the residential developments and submit a planning application.

5. BRIEF AND BACKGROUND

5.1 Brief

The objective of the Hillbourne Masterplan is to accommodate Hillbourne Primary School in a single, fit for purpose building in order to improve educational outcomes for young people and address the serious condition issues identified in the existing buildings and mitigate the management issues that arise from this. Facilitating this solution enables the release of land for housing in line with the local plan.

5.2 Background

In response to the findings of the 2015 condition survey and Hillbourne Primary School's ongoing aspiration to be accommodated in a single building, the Borough of Poole commissioned an initial feasibility study to decide which of the existing buildings would be most suitable to accommodate the school. The solutions recommended by the feasibility study required substantially more funding than was allocated to School Condition.

As the result of a free school application from the Delta Trust, a site wide masterplan was commissioned in January 2017 to consider how the school could be accommodated in a single building, with the proposed free school located on the site and any surplus land sold for housing in order to help fund the scheme.

In September 2017 the DfE confirmed that they no longer wanted to situate the Harbour Free School on the Hillbourne site. As a consequence of this decision, the Borough was released from its obligation in respect of the Free School and was able to revisit the Masterplan for the site, focussing on how surplus land could be disposed of in order to fund the amalgamation of Hillbourne Primary School in a single building and include a 30 place bespoke pre-school provision on the site.

An Outline Business Case (OBC) for the Hillbourne Masterplan was agreed by the Strategic Programme Board in January 2018; this was agreed by Council as part of the Children's Services Capital Programme in March 2018. This OBC put forward two options: refurbishing the Oaks Building (as it is the larger of the two and requires less work to be undertaken) and a New Build Option in the middle of the site (as the whole life costings for this proposal offer improved value for money for the project). It was proposed that the remainder of the site will be disposed of under a Section 77 application to the Secretary of State to facilitate residential development. The receipts arising from this sale/development will be used to fund the construction of the new school.

The Strategic Programme Board concluded that there were a number of risks associated with doing nothing (the possibility of having to close the school due to condition issues; maintenance costs that exceed the condition allocation available; the risks of losing the land if the school is forced to convert to academy status) and discounted this option. It was agreed that the option of constructing a new build modular building in the middle of the site provided the best value for money and presented the least disruption to the school. It was also recommended that a bespoke 30 place pre-school be included in the proposed scheme to replace the accommodation for Twin Oaks Nursery that would be lost with the demolition of Waterloo Youth Centre. This recommendation was included in the OBC. A funding gap of about £2.5m was identified for this project at the OBC stage.

Up to £400k has been allocated to compile a Full Business Case (FBC), taking into account the use of the whole site and a financial strategy to meet the identified funding gap.

5.3 Purpose of Full Business Case

The OBC identified a funding gap of around £2.5m between the estimated funding sources available and the recommended option of building a new 2FE Primary School on the centre of the Hillbourne site. The FBC was commissioned in order to investigate the recommended option for building a new 2FE Primary School and pre-school in more detail, including a developed design and accurate costings. As well as this, it was agreed that the document would look at plans for the layout of the housing plots on either side of the proposed new build school and provide a more accurate estimate as to the receipts that could be generated from the disposal of this land.

The FBC was compiled with a wide range of consultants with appropriate skills and experience, who were asked to undertake a detailed feasibility analysis of the site to identify a suitable scheme and understand its costs and risks. The feasibility analysis was specified to be at RIBA work stage 2 with an accompanying RICS Formal Cost Plan 1. The site wide surveys that were necessary to produce RICS Formal Cost Plan 1 were relevant to the designs of the Primary School and the residential development. The designs developed during this process were used to submit a pre-application to Planning and feedback has been received that will inform the final planning application.

The Strategic Housing team engaged Poole Housing Partnership to help with the outline design and costings for the housing plots. Poole Housing Partnership appointed consultants to complete outline designs and costings for the housing plots, considering different build types and methods of delivery to maximise the land values.

A project manager coordinated the two work streams and used the technical outputs to compile the FBC and update the Strategic Programme Board.

6. STRATEGIC FIT

The masterplan proposals for the Hillbourne Primary School site address a number of areas where the council has a statutory duty:

- The Council has a statutory duty to ensure that all children are educated in high quality premises which do not put the health and safety of children at risk.
- The Childcare Act 2006 which requires local authorities to improve the outcomes for all young children, reduce inequalities, and to ensure that there is sufficient high quality integrated early years provision and childcare for parents locally.
- The Council has a statutory duty to secure sufficient and suitable school places for Poole resident children of statutory school age.
- The Council has a duty to meet its “objectively assessed housing need” set out by a formulae from central Govt. That supply need for Poole is 710 new homes per annum through to 2033. The Council’s policy outside of the town centre is to achieve 40% affordable housing on housing schemes that are 10 or more units.
- It is the statutory duty of the LA to ensure that young people can access a suitable range of positive activities.
- The Council has a duty to achieve value for money for taxpayers.

6.1 Business Need

In 2015 the LA commissioned a condition survey to be undertaken on Hillbourne Primary School, which showed that, despite investment in both buildings, their overall condition of the is below average with a number of areas in a poor state of repair and the services approaching the end of their expected life.

The cost of addressing the high priority condition items was estimated at £1.4m, a figure which would rise to £2.7m by 2020 as items identified as lower priority deteriorated. Even if all of the identified conditions in Oaks building are addressed, the estimated 25 year life cycle costs for maintenance of the building are over £2m more than those of a new build school; this estimate does not take into account the 25 year life cycle costs of the Acorns and Little Acorns buildings.

The Borough of Poole has a housing register which has approx. 950 households with need for affordable housing. The need is for all types of housing, both general needs family accommodation and sheltered housing that is fit for purposes and enables occupant to remain independent in their own homes. There are also over 300 households registered with Help to Buy South West with a need for low cost home ownership such as Shared Ownership.

Redevelopment of Hillbourne school presents a significant opportunity to not only address the school’s needs but also provide a mixed tenure development of new homes that would contribute all round to the areas housing needs requirements.

6.2 Contribution to strategy and key objectives

The project supports the key Children, Young People and Learning objective of ensuring that every child and young person attends a school which is Good or Outstanding and is able to achieve their full potential. The school operating in two buildings with poor condition issues is hampering their ability to make the required rapid improvements to pupil outcomes.

The school has difficulty in maintaining the staffing required to ensure improvements in teaching and learning as money is instead spent on maintaining additional office staff for the two Reception areas; additional dinner staff to provide cover for the two lunch halls (as neither building can support lunch provision for all pupils); additional capacity in SLT to ensure that a presence is possible in both buildings and the increased maintenance and utilities costs required to maintain the condition of the school buildings.

Along with the Council's Local Plan and housing targets it is clearly set out in the 2018-2020 Housing Strategy Refresh that the Council will continue with its commitment to utilise land and assets to help the supply of more new homes.

Waterloo Youth Centre is currently utilised by a third sector organisation to deliver a minimum of one night/week of positive activities for young people. The provision of positive activities for young people is a fundamental building block within Poole's Early Help Strategy. Through Children, Young People & Learning, the Borough is working closely with the third sector to ensure a vibrant provision of positive activities for children and young people across the entire town. Whilst the Local Authority's employed and qualified Youth Work Team delivers from a number of centres across the town, the strategy also involves support for the wide range of organisations involved in this agenda who deliver a diverse range of activities from a large number of venues. The proposals of the Masterplan would remove the financial liability of the Waterloo Youth Centre building whilst still maintaining youth provision in the Hillbourne area by third sector organisation delivering services from the new 2FE Primary School.

Twin Oaks pre-school is currently located in Waterloo Youth Centre, a building which is also in poor condition and inadequate to its needs. Hillbourne has no other childcare provider in its immediate area and Twin Oaks Pre-school is a popular choice for disadvantaged 2, 3 and 4 year olds. It is important that a 30+ place pre-school, with improved facilities and opportunities for expansion, is maintained in the Hillbourne area so that the Council can continue to meet its statutory duty in relation to high quality early years provision.

6.3 Stakeholders

The project involves a range of stakeholders who have been engaged throughout the development of the FBC:

External stakeholders include:

- The Department for Education
- The Education and Skills Funding Agency
- Poole Housing Partnership
- The Planning Authority
- The Transportation Authority
- The management of Twin Oaks Nursery
- Utility companies with apparatus on or supplying the Hillbourne Primary School site

Internal Stakeholders include:

- Children, Young People and Learning
- Hillbourne Primary School
- Housing and Community Services
- Youth Centre Management
- Corporate Procurement
- Legal and Democratic Services
- Financial Services – Estates
- Transportation Services – Property Management
- Council and Council Members
- Ward Councillors
- Commissioning and Improvement Services

If the Masterplan is approved, a communication strategy will be developed in partnership with Corporate Communications in order to engage with stakeholders who have yet to be included in the process, such as:

- The Health and Safety Executive
- Contaminated Land Authorities
- The Environment Agency
- Residents Associations
- The users and voluntary groups at Waterloo Youth Centre
- Local Media
- Current and future pupils and parents of Hillbourne Primary School
- Current and future residents of Waterloo Estate
- Potential development contractors

6.4 Options considered at OBC

A number of options were explored and dismissed at the OBC stage as they would not lead to a cost effective solution or meet the objective of accommodating the school in a single fit for purpose building. The options considered were as follows:

Option 1 – Do nothing: leave the school in the existing buildings address the high priority condition issues as and when they arise.

Attempting to address the condition issues currently assessed as high priority would expend the entire existing capital contingency, with a proportion of these condition issues remaining unresolved. This would mean that disproportionately large sums of money from the school budget will be required to maintain the current buildings, with the council unable to provide adequate financial support through the significantly reduced condition allocation received from the Education and Skills Funding Agency. Without the necessary levels of investment, it is likely that parts of the school would need to be closed to ensure the health and safety of the pupils within. Closure of parts of the school will make the delivery of education impractical within the remaining spaces and this will affect the outcomes of the children currently educated there.

With a disproportionate amount of the school budget being spent on addressing the building condition issues, the school will be unable to use this funding to invest in teaching and learning and this will be an impediment to improving pupil outcomes. If the school outcomes do not improve and the school is given a compulsory order to convert to academy status, the Borough of Poole will no longer have the option of developing any surplus land on the site that is made available by accommodating the school in a single building. This option was not recommended and would present significant difficulties for the

school and Borough of Poole in the short to medium term and ultimately result in the closure of the school.

Option 2 – Refurbishment and extension of the Oaks Building

This option would see Hillbourne Primary School provided within a remodelled, refurbished and extended Oaks building, which is suitable to accommodate a 2FE primary school; this building would be above the standard area recommended by BB103. The Acorns, Little Acorns and Waterloo Youth Centre buildings would be demolished. This option would also see the development of a 30 place pre-school provision within the refurbished school building.

This option was not recommended on a value for money basis because the costs exceed that of a new build modular school, with the estimated 25 year life cycle costs over 50% larger than the costs of a new modular or traditional building. These figures also do not take into account the risk factor of refurbishment and extension of an existing building, which is likely to be extensive. The construction works involved in this option would also be extremely disruptive for the existing pupils, which is likely to have a significant negative affect on the school's improvement journey, and a large amount of temporary accommodation would be required in order to maintain the operation of the school during the project.

Option 3 – Traditional new build school constructed on the centre of the site

This option would see a BB103 compliant new build school and pre-school constructed on the centre of the Hillbourne site, with the current Oaks, Acorns and Little Acorns and Waterloo Youth Centre buildings being demolished and the north and south of the site disposed of for residential development.

The construction of the school and pre-school in the centre of the site would allow the existing buildings to remain in operation and minimise the disruption to pupils.

This option was not recommended because the cost of a traditional new build school is higher than the cost of a modular new build school and the difference in 25 year life cycle costs is not enough to make this the best value for money option.

Option 4 – Modular new build school constructed on the centre of the site

This option would see a BB103 compliant new build school and pre-school constructed on the centre of the Hillbourne site, with the current Oaks, Acorns and Little Acorns and Waterloo Youth Centre buildings being demolished and the north and south of the site disposed of for residential development.

The construction of the school and pre-school in the centre of the site would allow the existing buildings to remain in operation and minimise the disruption to pupils. A modular building would also present a shorter construction programme than a traditional new build, further reducing the disruption to existing pupils.

This option was recommended to be taken forward to Full Business Case stage because the cost of constructing this building and the anticipated 25 year life cycle costs present the best value for money for taxpayers, the least disruption to the school and the best solution to the problems presented by the existing buildings.

7. SITE OVERVIEW

7.1 Site context

The Hillbourne site sits on Kitchener Crescent and has an overall area of 46,154 m² (11.405 acres / 4.615 Ha) and has four main buildings, three comprising Hillbourne Primary School, (Oaks, Acorns, and Little Acorns) and Waterloo Youth Centre at the northeast of the site.

The gross internal floor area (GIFA) for each building as follows:

- **Oaks**
 - Ground floor 1468m²
 - First floor 602m²
 - Second floor 19m²
 - Total area 2089m²
- **Acorns**
 - Ground floor 1249m²
 - First floor 6m²
 - Total area 1255m²
- **Little Acorns**
 - Total area 372m²
- **Youth Centre**
 - Total area 250m²

The site is accessed from Kitchener Crescent by four vehicular access points, and four pedestrian access points. There is also a pedestrian access point that leads from Hillbourne Road to the northeast of the site but this has been blocked off for a number of years. Waterloo Youth Centre does not have a separate vehicular access and the staff makes use the car park for the Oaks building.

The site is contained along its boundaries by mature landscape. Mature trees are predominantly along the western boundary with a significant and dense band running through the site parallel to this boundary. The contours and gradients vary across the site: adjacent to Kitchener Crescent, there is a low plateau, which rises to the northern boundary with transition in levels of over 10 metres. The centre of the site has a large amount of informal hard play. There is one soft pitch located adjacent to the Acorns building but this is not in compliance with Sport England's requirements as the gradients across the pitch are significant. The condition of the pitch is poor, water logged and rendered inoperable for the majority of the playing year. All other soft play areas suffer significant gradients, which render the soft play difficult to utilise for any ball games or formalised sport activity.

The security of the school is paramount for child protection. Due to numerous entry points, both vehicular and pedestrian, considerable lengths of fencing and boundary treatments have been required along the entire Kitchener Crescent boundary to ensure the safety of the children.

7.2 Site constraints

The site is subject to a number of practical and legal constraints that have informed the design of the school and the housing.

7.2.1 Other site users

Waterloo Youth Centre

Waterloo Youth Centre is situated in the northeast corner of the site. Waterloo Youth Centre is currently utilised by a third sector organisation to deliver a minimum of one night/week of positive activities for young people during the school term.

The Senior Manager for the 5 - 19 Team has met with the Headteacher of Hillbourne Primary School to discuss future provision of positive activities for young people on the Hillbourne Site. The school have agreed in principle to allow youth activities to take place using their facilities, but there are some logistical issues that will have to be overcome before a formal agreement is put in place.

Twin Oaks Pre-school

Twin Oaks Pre-school operates a 40 place early years provision for 2,3 and 4 year olds out the Waterloo Youth Club building. This provision is open on weekdays during the school term between 9.00am and 3.00pm.

A meeting has taken place with the leader of Twin Oaks Pre-School and they are broadly supportive of the proposals. A further meeting regarding the design of the pre-school will take place during the next stage of the project.

7.2.2 Existing Services

There is a public foul sewer bisecting the Property. This runs from Southbrook Farm on Wetherby Close to Kitchener Crescent. There is also a strategic sewer running along the length of the eastern boundary of the Property. It is not permitted to build over an adopted sewer without the consent of Wessex Water, who may impose conditions within the agreement. In the case of the 'strategic sewer' the minimum clearance distance stated is 6m and no build over will be permitted. All other services are located within the surrounding highways network.

There are a number of telegraph poles running along the eastern boundary of the school site, with wires extending from the school to the telegraph poles and the residential properties on Kitchener Crescent.

There is an existing sub-station located adjacent to the plant room at the north end of the Acorns building. This sub-station is subject to a 99 year lease, which has a further forty four years to run. The lease includes a right of way for vehicles and cables, which runs from Kitchener Crescent to the leased site. Within the lease there is a clause that requires the electricity board to reposition the substation to another site provided by the Council if the adjoining land of the Council is being redeveloped.

7.2.3 Legal Constraints

The roads around the Property are adopted highway. Footpath 106 runs from Hillbourne Road to the northern boundary of the school.

Tree Preservation Order TPO/25/1963 is shown as affecting the Property although the tree is stated to be located at 11 Wetherby Close.

The conveyance of the land to DCC in 1952 contains a number of provisions which burden the land:

- i) The vendor reserved the passage and running of water and soil to the land. This right includes the right to lay and repair pipes, drains and watercourses in and through the Property. Whilst the adjacent areas appears to be fully developed now so it is unlikely that there will be any requests for new drains to be laid, there is still a right for those whose land does drain into the Property to enter the site to maintain existing pipework.
- ii) There is a restriction against building and restricting use of the unbuilt on land within the Property except for educational purposes. Whilst the current buildings within the Property would fall within this category any redevelopment proposals may be a breach of this covenant.
- iii) There is an obligation on the buyer to construct and maintain a fence along the western boundary.

In addition to the covenant contained within the transfer of 1952, part of the Property will be covered by the restrictions on disposal/change of use contained within Section 77 of the School Standards and Framework Act 1998 as they will constitute a school playing field. It will therefore be necessary to have Secretary of State Consent to any proposals to redevelop the Property.

A full title search is available upon request.

7.2.4 Habitat and Environmental Constraints

There are a large number of mature trees on the site, which have been identified in the arboricultural survey.

The Hillbourne site also has an existing Urban Green Space designation identified in the current adopted Local Plan. It is proposed in the emerging Poole Local Plan that this designation will be removed and replaced with an allocation for the site to deliver a new school and housing. The emerging Poole Local Plan is expected to be adopted in autumn 2018 subject the receipt of the Local Plan Examiner's final report.

7.2.5 Site Surveys

Hydrock Consultants Ltd has undertaken surveys to build a thorough understanding of the base conditions on site, in order to inform the designs of the school and housing so that accurate costings can be produced for the Masterplan. As part of this process, the following surveys have been undertaken:

- Acoustic
- Air quality
- Arboricultural
- Archaeological
- Buried services
- Drainage
- Ecological
- Flood risk

- Ground conditions, inc. Geotechnical, soakage testing and contamination
- Topographic
- Transportation
- Utilities

A summary of the findings of these surveys is included at Appendix C. Full copies of the surveys are available on request.

7.2.6 Planning Pre-application and engagement with Transportation

Planning considerations

The Poole local plan draft July 2017 has been used as a reference point for the planning policies related to the site with the following mitigations:

- *PP25: Sports, Recreation and Community facilities - to protect existing facilities, including school playing fields* – the existing play spaces are not flat, liable to flooding and of poor quality. The design incorporates Building Bulletin 103 and Sport England compliant formal pitch, hard play and informal play spaces. It is also proposed that these spaces will be available for some community use.
- *PP26: Design - improve standard design and development proposals* - the new build accommodation would be a significant enhancement over that of the existing structure.
- *PP32: Biodiversity and Geodiversity – development and biodiversity* - it is proposed that the information gathered from the surveys will be used to maintain the biodiversity and ecology of the site.
- *PP33 Transport strategy - deliver a safe, connected and accessible transport network across south east Dorset* - There will be no increase in terms of the numbers of trip generation to the school site and a transport report will be produced as part of the masterplan.

The Hillbourne Primary site is designated for educational use in the local plan and would retain this, albeit it would not be the predominant use. It is proposed that the educational use is an enabler and a primary land use, which requires the support of the housing development to facilitate the construction of a new school. The draft local plan already allocates part of the site for housing.

Other elements regarding design and principals of design would be observed as part of the planning application. There are no particular flood risk assessments or heathland buffers which are relevant to the particular site.

Initial meeting with Borough of Poole Planning and Transportation

A meeting was held on the 4th June 2018 with a Senior Planning Officer, Arboricultural Officer and Biodiversity Officer from Poole Borough Council. Design principles for the site were discussed at this meeting and incorporated into the designs. The environmental and biodiversity implications on the site were addressed and surveys to determine the biodiversity of the site will be developed accordingly. Wherever possible, Cube Design's proposals are retaining the maximum number of trees on site a number of options have been produced for the housing plots that retain a varying number of trees.

A meeting took place on the 8th June 2018 with a Strategic Highways Officer. The Officer saw no major issues with the site proposals and recommended that access to the site be gained from existing entrances and that the pathway from the northwest to Hillbourne Road be reopened for better pedestrian access.

Engagement with the EFSA

As part of the development of the FBC contact was made with the EFSA to reiterate the engagement that has already been made regarding the Hillbourne site when they were proposing to use the site for a free school and ask questions regarding the timescales and processes involved in the Section 77 application. To date a reply has to this correspondence has not been received.

Engagement with Sport England

The area provided as part of this proposal complies with the Building Bulletin 103 and the recommended provision of sports accommodation on site. Cube Design have been in consultation with Sport England and issued them with documentation regarding the proposals.

Sport England was not supportive of the initial proposals. Cube Design submitted further proposals with explanation as to why the proposed provision is an improvement on the school's current provision.

Following this, Sport England has said that they consider the proposal to broadly meet their planning policy exceptions E3 and E4 and therefore we are likely to support the application for planning permission subject to certain conditions. Furthermore, they have recommended a community use agreement be put in place on a block booking basis and also that the MUGA be floodlit, not just for the benefit of community use, but also for the school and extended school use.

The full response from Sport England is attached in Appendix G.

8. SCHOOL DESIGN

8.1 Educational context

The school opened in 2006 following the amalgamation of Hillbourne First School and Hillbourne Middle School. The school is accommodated in the former First School buildings within Acorns and Little Acorns and the former Middle School building within Oaks.

Hillbourne Primary School has a published admission number (PAN) of 60 pupils, which represents 2 forms of entry. This gives a total capacity of 420 pupils, in 7 year groups, (Year R to Year 6).

In 2017, the school was judged by Ofsted as 'Requires Improvement' and the school needs to raise standards and improve outcomes for pupils. The school not being accommodated in a single building means that there are significant challenges in delivering a joined up curriculum in order to improve outcomes for pupils.

Twin Oaks Pre-School is currently located in the Waterloo Youth Centre. The number of children accessing free early education at Twin Oaks Preschool has declined in the past three years, from 38 in autumn 2014 to 25 in autumn 2017.

8.2 Issues that informed the school design

Cube Design considered the following issues that need to be addressed when drawing up the school design:

- The poor state of repair and condition of the existing school buildings - fabric and structure
- The Reception classes are located in Little Acorns block which is a temporary building that is past its reasonable lifespan.
- External and internal level changes that are not DDA compliant.
- The play areas are segregated and particularly difficult to supervise, which limits the space the children can safely utilise.
- The security of the site needs to be rationalised and the protection of the children carefully considered.
- The main entrance to both Oaks and Acorns is difficult to find and does not provide a sense of arrival with controlled access.
- The separate school buildings create issues with staffing, child protection and provides an obstacle to forming a coherent school community.
- The financial problems associated with running two separate school buildings with significant condition issues.
- Classrooms in both buildings vary in size and are generally below standard.
- Circulation throughout the school buildings is not rational.
- The thermal and acoustic performances of the buildings are below standard. There are few windows that can be opened for natural ventilation.

In addition to this, the new school building has been designed with a 30 place pre-school because and the current accommodation for Twin Oaks Pre-School is very poor for the needs of the provider and it is proposed that this building be demolished as part of the masterplan. Although the number of children

accessing Twin Oaks Pre-School has declined in the past three years, there are no other childcare providers in the Hillbourne area and Twin Oaks Pre-school remains a popular choice for disadvantaged 2, 3 and 4 year olds.

8.3 School compliance to BB103

Building Bulletin 103 established by the DfE identifies a minimum site area for a 2 form entry Primary school of 15,986m². The proposed site area identified for Hillbourne Primary School is 16,250m². The guidelines set down by the DfE for the creation of a 2 form entry school identifies 2,072m² of accommodation. This is in line with “Building Schools of the Future” and PSBP2 design guidelines and toolkits.

The proposals identified are 2,128 m² due to the configuration on site, but also include a pre-school for 34 children with an overall area of 147.5 m².

8.4 School and pre-school design principles

The basis of the design is to accommodate the school in one building in the most economical and least disruptive solution that proves the most effective for delivering the curriculum education. At the heart of the masterplan is the 2FE primary school, Building Bulletin compliant, with associated external play and support areas.

Following the analysis of the previous feasibility studies, the central area of the site was determined to be the best location for the development of the 2 form entry Primary school as it provides a level site with limited gradients, the opportunity to connect to existing services, a site clear of existing buildings and allows the existing buildings to remain in occupation while the works are undertaken.

Due to a shortfall in the funding available to the Borough of Poole to provide a new 2FE Primary School, it is essential to secure the disposal of the surplus site areas for potential residential use to support the re-building and provision of the new 2FE school. This would not only, in planning and urban design terms, create a community school and appropriate land use adjacent to the educational facility but would also assist with bridging the capital expenditure gap to delivery the 2FE primary school.

In consultation with the school, Cube Design have created a design that has evolved around the principle of creating a school that is community facing, engaging with the community and has a street frontage. The design was based on the following principles:

- A two storey structure to provide an economic footprint, and an improvement to the street frontage onto Kitchener Crescent.
- A clear identification of the entrance to the building and a focal point.
- External landscape will provide a plaza feature to the frontage of the building.
- The main entrance will be single storey with a two storey configuration for the teaching wing and a similar two storey volume for the main hall and large spaces.
- The main hall and studios are community engaging, opening up and creating a sense of place.
- Car parking is located to one side of the facility and is embraced into the existing landscape. It is a soft urban landscape response to car parking.
- Deliveries and servicing are provided off the car parking areas.
- The sub-station to service the building is moved to the landscape edge.
- The overall massing and form is complimentary to the properties which exist on Kitchener Crescent.

- It is proposed for the building to be contemporary, utilising soft materials namely brickwork at low level with timber cladding and a contemporary feel to the overall façade treatment. This would be developed as part of the planning application to be submitted in due course.
- The roofs will be gently pitched, enabling light to extend into the depth of the corridor spaces and into the volume of the main building.
- Security to the perimeter of the site will be incorporated into the landscape; boundary fencing will be a maximum of 1.8 metres. Wherever possible, the boundary would be incorporated into landscape hedges and to soft boundary treatments.
- The pre-school maintains a separate entrance from the school and is located next to the Reception Classrooms
- It is intended to create a modular building for the two-storey element and a traditional construction for the single storey.

8.5 Proposed Schedule of accommodation

Through the design phase of the project, a schedule of accommodation itemising individual spaces has been prepared. This has been based on BB103 with minor adaptations to suit the requirements of the school:

- 6 Reception and Infant Classrooms are 62 m², with 8 junior classrooms being the standard 56 / 57 m²
- The kitchen area has been reduced from 60 to 37 m² because meals are not heated or prepared on site (with hot meals being delivered) so a large scale industrial kitchen is not needed. This space has been used in other areas, including classrooms and caretaker facilities.
- A facility for caretakers and a storage area.
- Additional space for circulation with link corridors
- Additional staff showers
- The pre-school accommodation is 147.5 m²

On this basis, the total proposed floor area for the Primary School has been agreed at 2128m² and 2275.5 m² with the pre-school is included.

The full schedule of accommodation is attached as Appendix D

8.6 School design details

The school is located facing on to Kitchener Crescent, with a clearly defined main entrance to the reception area. A clearly defined entrance is also provided to the pre-school.

The hall faces the community and offers the benefit of a large space that could be utilised for community or youth centre use. A series of landscape spaces have been created to the frontage of the school – squares – which will enable the external use of these spaces, particularly bearing in mind the significant mature trees and landscape.

All pupil access is through the main entrance area with a secondary access being provided to the staircase link to the two-storey building. The classroom accommodation is located within a two-storey building, which incorporates the 14 classrooms, support areas, WCs, staff room and pastoral care. Staircase and lift access is provided to the two-storey building.

The single storey main entrance is a focal building with a central access to a feature landscaped garden, linking through into the library, ICT and pastoral care spaces. The link to the left-hand side of the main entrance is the main hall and studio. This has large glazed areas facing on to Kitchener Crescent and a seating area for the students to utilise for lunch breaks and outside school activities.

The areas are totally secure – the perimeter fence provides the first line of defence to the school for security. Low level landscape, fencing and hedging will provide defined security to the particular activity spaces. There are low-level seating areas to the dining, main hall and entrance square. Similar features apply to the pre-school and entrance areas in these locations.

The architectural treatment of the building is to create a light and airy form with significant daylighting to the building being afforded through clerestory lights, and the roof pitch formation.

A mixture of colour and texture is incorporated into the external façade. This includes the use of timber, colour panels and the soft texture of the metal cladding. The metal cladding is provided in panels. Polycarbonate units are also incorporated to ensure the maximum amount of daylight reaches into the internal spaces.

The schedule of accommodation is in line with BB103. The baseline figure is 2,072m². Enhancements have been made to this figure to allow for staff showers and adjustment of the classroom facilities. The kitchen has been reduced from the standard schedule size of 60m² to 37m² on the basis of the discussions with the school and the expected uses of the dining areas.

The form and style of the building ensures maximum daylight, flexibility and adaptability. The building is designed for the school to utilise specific sections (e.g. hall and studio) and to zone the accommodation accordingly.

The 30-place pre-school has been designed with the ability to expand and contract accordingly. The pre-school provides an opportunity for a through-school theme and has immense benefits for the Hillbourne Primary School.

The design is environmentally sensitive and is aspiring to BREEAM Excellent.

Car Parking

There are approximately 36 car parking spaces on site. There are only 24 spaces defined and marked out; the rest of the parking occurs on an informal basis. There is no provision for moped parking. Existing cycle racks are provided with a total of 10 spaces.

The Masterplan proposals incorporate car parking for the school with a total of 32 spaces, this includes 28 for the school itself and 4 visitor spaces, including 2 disabled spaces. There will be 2 additional spaces for the Pre-School parking, making a total of 34 spaces.

A full specification has been provided in respect of the proposals for the scheme. It is intended to create a modular building for the two-storey element of the building to reduce the time periods involved in construction and provide a cost effective solution. Traditional construction will be used for the single store element of the building because modular construction is less suitable for double height spaces.

8.7 School and pre-school proposed plans

The masterplan and floor plans for the school are available at Appendix B.

8.8 FFE and ICT strategy

The strategy includes the school using some legacy ICT equipment that was purchased using Capital Maintenance funding.

8.9 Section 77 Application

As part of the school construction and design process a Section 77 application for disposal of school playing field land needs to be made to the Secretary of State for Education in order to facilitate the development of the residential land.

This application process has the potential to significantly impact the programme for developing the new build school if a decision is not forthcoming.

9. RESIDENTIAL DESIGN

With a new build school being developed using BB103 guidelines on an area of 16250m² in the centre of the site, this leaves two plots of land surplus land at the north and south of the site which can be developed for housing.

- Plot 1 (North of the site) – 20870m²
- Plot 2 (South of the site) – 9034m²

Housing and Community Services commissioned Poole Housing Partnership to work on the design and valuation of the housing land. Kendall Kingscott was commissioned to draw up the design for the residential development.

9.1 Housing Mix

The Borough of Poole's arm's-length management organisation and development partner, Poole Housing Partnership (PHP), have produced site design proposals detailing the optimum density of housing for consideration based on the following general development options:

Mix of house types across both sites:

- General needs accommodation comprising of two bedroom 4 person houses.
- General needs accommodation comprising of three bedroom 5 person houses.

Mix of house types across both sites with sheltered accommodation:

- General needs accommodation comprising of two bedroom 4 person houses.
- General needs accommodation comprising of three bedroom 5 person houses.
- Sheltered accommodation comprising of one bedroom 2 person flats.

Sheltered housing has been included in this development because the current standard of much of the local sheltered housing does not meet current requirements on space standards and accessibility. A block of fit for purpose sheltered housing that facilitates community needs as identified locally has been included in the scheme.

The development will comply with the DCLG – National Space Standards. The sheltered housing will be designed with HAPPI principles, where practical.

The scheme will also be Secure by Design compliant.

9.2 Development constraints and opportunities

A 10m level difference in the site - from the top of the site to Kitchener Crescent - has meant that the units will be subject to further review once detailed surveys have been undertaken.

A large band of mature trees runs through the centre of the site. It is proposed to maximise the development area based on the early engagement with Planning through the pre-application process.

An opportunity to create pedestrian permeability though the sites would be developed to ensure a link from Hillbourne Road into Plot One would be established to the bus route.

A storm water drain runs along the boundary for the site to Kitchener Crescent. No units will be built over this. An easement/"no dig zone" is to be confirmed.

9.3 Design principles

Both proposed residential plots have a single vehicular access point into them from Kitchener Crescent.

It is proposed to reintroduce the pedestrian route from Hillbourne Road into the northwest of the site.

The parking provision has been calculated, in conjunction with Hydrock, using the Borough of Poole car parking guidance which is based on optimum numbers (with no maximum or minimum figures defined). Kendall Kingscott are of the opinion there is some flexibility depending on whether the spaces are allocated or unallocated, but working on the basis that the spaces will be largely allocated (which is typical for residential developments with on plot parking such as this), the following has been calculated:

	Total Units	Allocated Parking	Visitors Parking
Plot 1	68	126	14
Plot 2	35	68	5

For the purpose of the proposal, Kendall Kingscott has considered parking requirements for each site individually.

The parking guidance suggests that car parking spaces within new developments should be designed to 2.5 x 4.8 metres and that where car parking is adjacent to homes then at least one parking space should be capable of enlargement to attain 3.3m, which would assist with disabled access to a vehicle. The proposals have been designed to meet these criteria.

The road width within the site is 5.5m with pavements 2.5m wide either side with a 500mm easement. It is proposed the roads through the sites will be adopted by the Local Authority.

It is proposed the section of highway along Kitchener Crescent will be reviewed and remodelled to facilitate the proposals. The residential vehicular access strategy would require amendments to the existing traffic calming on Kitchener Crescent. Appropriate traffic calming measures have been proposed and agreed with highway officers. There would be no requirement to extend the 20mph speed limit.

9.4 Design Options

Kendall Kingscott, in consultation with Housing and Community Services and Poole Housing Partnership, developed a number of options for the residential design. These options attempted to show a balance between meeting the objectives of the project, i.e. delivering the largest number of housing units on the site, and satisfying the planning principles established during the initial consultation with BoP Planning and Transportation.

Five designs for the residential developments were drawn up by Kendall Kingscott, with options SK01 and SK02 being dismissed at an early stage as they would not be financially viable in the context of the Masterplan.

Three options were submitted as part of the pre-application and advice was sought as to which option would be most likely to gain planning approval:

Option - SK03

This layout provides a mix of 61no. 2 bed 4 person units and 45no. 3 bed 5 person units.

The residential units are a combination of terrace and semi detached dwellings to optimise density yet still retain amenity space for each dwelling. Parking is located adjacent to the units.

Landscaping will be introduced within the parking areas to soften the key routes around the site and there is potential for a green space link between the plots-subject to review.

A plan of this option has been included at Appendix H.

Option - SK04

This layout provides a mix of 55no. 2 bed 4 person units and 45no. 3 bed 5 person units. A sheltered accommodation block of apartments is also proposed. This will be a 3 storey block providing 25no. 1 bed flats. A shared lounge, office and utility space will be provided within this block.

The residential units are a combination of terrace and semi detached dwellings to optimise density yet still retain amenity space for each dwelling. Parking is located adjacent to the units.

Landscaping will be introduced within the parking areas to soften the key routes around the site.

A plan of this option has been included at Appendix H.

Option - SK05

This layout provides an alternative location for the sheltered accommodation block which would be screened by the existing tree belt and retain a number of the mature trees at the west of the site. Urban green space would also be provided for use by all.

A mix of 41no. 2 bed 4 person units and 37no. 3 bed 5 person units. A sheltered accommodation block of apartments is also proposed. This will be a 3 storey block providing 25no. 1 bed flats. A shared lounge, office and utility space will be provided within this block.

The residential units are a combination of terrace and semi detached dwellings to optimise density yet still retain amenity space for each dwelling. Parking is located adjacent to the units.

Landscaping will be introduced within the parking areas to soften the key routes around the site.

Feedback from the pre-application indicates that this proposal is most acceptable to Planning and therefore a plan has been included below.

This plan is available at Appendix B.

10. PRE-APPLICATION FEEDBACK

A pre-application was submitted to BoP Planning in July 2018.

10.1 Conclusions of pre-application feedback

The feedback from this pre-application presented the following conclusion:

The emerging Poole Local Plan includes a policy supporting the principle of the use of the site for residential development. Irrespective of that policy the principle of the scheme has significant social benefits, by providing a large number of family homes and a new school and significant environmental benefits of delivering such development in the existing urban area and the benefits its design could make for the character and appearance of the area. Minor economic benefits would exist during construction.

However the options presented at this time do not deliver design solutions that could be supported, advice and guidance is given herein and we would be keen to meet with you to discuss alternatives prior to any application or public consultation exercise being undertaken. The absolute numbers may have to be reduced in order to achieve an acceptable design and layout.

The views of Sport England regarding the development on the existing sports pitches, could materially alter the acceptability of the scheme. Whilst it would be for the decision maker to apply weight to any objection of Sport England, any outstanding objection could require referral to the Secretary of State for their review, which would have implications for the decision making timescale.

The feedback report suggests that the proposals for the new build 2FE Primary School are broadly acceptable to planning. The proposals for the residential developments are supported in principle but there are concerns about the proposed indicative urban design options that have been developed to date. However, the feedback suggests that the amendments to the design of the residential scheme will not have a significant impact on the number of units that can be accommodated on the site. Discussions are now ongoing with planning and urban design officers in respect of the residential design to ensure that an appropriate design solution can be achieved. In this regard, these discussions indicate that the preferred option presented in this report has potential in design terms to be supported by the local planning authority.

Further consultation regarding the designs will need to take place with planning to ensure that the residential developments are acceptable without reducing the number of housing units.

Full feedback for the pre-application is available at Appendix I.

11. AFFORDABILITY

11.1 Outline Business Case costs – December 2017

A high level cost analysis of the proposed options was undertaken for the Outline Business Case. These costs were set against the possible funding sources available to the Council, including a high level analysis of the funding that could be generated by the receipts from the housing land. The cost analysis for the recommended option (new build modular school) is set out below:

Option	Costs	Income		Construction Shortfall	25 year life-cycle cost	Overall total
		School Condition Grant	100% Affordable Housing Land Offer			
New Build Modular School	£8,589,000	£1,500,000	£4,647,000	£-2,442,000	£4,001,000	£12,590,000

This cost analysis assumed that 80 housing units will be developed on the site and that making them 100% affordable will provide the highest capital receipt as detailed in the high level costings provided by Sovereign Housing. The cost of the Primary School includes £150,000 of internal fees for the Building Capital Team.

11.2 Costs

Funding for the development of the Full Business Case was approved in Cabinet in February 2018 through the Capital Strategy Report appended to the Medium Term Financial Plan.

The purpose of the FBC is to interrogate the accuracy of these initial costings by adding more detail to the designs of both the school and housing, and to try and find ways to reduce the shortfall between sources of funding and the cost of a new build school.

Facilitating works

In order to facilitate the construction of the new build 2FE primary school and housing, the existing buildings - Little Acorns, Acorns, Oaks, Waterloo Youth Centre - need to be demolished and the hard paving associated with these buildings need to be broken up (see phasing plan for details).

In addition to this, some amendments need to be made to the traffic calming along Kitchener Crescent in order to facilitate the access to the housing plots and the electrical substation needs to be moved and upgraded in order to accommodate the design of the external areas for the new school and have the capacity for the new housing.

It is proposed that the demolition works are procured as part of the school construction contract as it is estimated that approximately 7% uplift will be added to the demolition costs by a contractor, compared to a likely 20% uplift from a housing developer.

The costs total costs for these works are estimated as £633,677 of which £202,677 is related to the school construction and £431,000 is to enable the development of the proposed residential plots.

A key decision needs to be made by Council as to whether to allocate £431,000 of Section 106 money to facilitate the construction of the residential plots of land on the basis that they would deliver 66 affordable housing units.

School Costs

Borough of Poole commissioned Gleeds Cost Management to use the survey information, architectural and technical design information to determine the costs for a new build Primary School and pre-school. The majority of the school is of modular construction, with the double height spaces (e.g. the hall) of traditional construction.

These costs for developing the school are estimated at £9,300,000. These costs have increased from the £8,589,000 presented at the Outline Business Case stage. This is due to the following factors:

- Deeper foundations are required for the school at the cost of approx. £300k
- Surface water attenuation is required for the school at the cost of approx. £200k
- The footprint of the latest design has increased by circa 58m².
- The fixed cost for demolition was previously £199k – however, having been out to the market, we have received a quotation for these works of £240k, resulting in £41k uplift.
- The diversion and upgrade of the substation at £137k
- Temporary car park access at £10k.
- The area of the external tensile canopies has increased to 160m² – the previous allowance was @40m².
- 2nr Pergolas have also been incorporated to the East elevation, not apparent within the previous scheme/design.
- Allowance for floodlighting to the MUGA at approx. £30k
- Building Capital Team project management fees at £150k
- Estimated payment to Wimborne Estate in order to overturn the educational use restriction covenant on the land at £75k

The details of this estimate may be found in Appendix A1.

11.3 Sources of funding

Housing Receipts

In order to determine the receipts generated by developing the surplus playing field land for housing, Kendall Kingscott used the site survey information to estimate a cost per m² for constructing each housing unit. This figure was then used to determine the land value based on the grant that can be obtained from the Homes and Communities Agency and the Negative Net Present Value (NPV) of the project.

On this basis, Housing and Community looked at a number of different models for disposing of the surplus playing field land. All of these options are based on residential design SK05 (see page 23 for details and page ... for the plan), the design that Planning indicated would most acceptable in the pre-application feedback (a mix of 41no. 2 bed 4 person units, 37no. 3 bed 5 person units, and a 3 storey block of 25no. 1 bed sheltered accommodation flats).

Option 1a - Housing Association

This option is based on disposing of the surplus playing field land to a housing association with the housing units being a mix of affordable rented properties (80% of market rent), shared ownership (SO) properties and sheltered accommodation.

Option 1b – Housing Revenue Account

This option is based on transferring the land into the HRA to be managed by the Borough of Poole's arms length management organisation, Poole Housing Partnership. The housing units would be a mix of affordable rented properties (80% of market rent), shared ownership (SO) properties and sheltered accommodation.

Option 2a – Market housing with 40% affordable requirement split across both housing plots

This option is based on disposing of some of the surplus playing field land for market housing. A valuation report was commissioned by Poole Housing Partnership and drawn up on the basis of taking into account the local planning requirement of 40% affordable housing on any new scheme, with these properties made up of a combination of sheltered accommodation, shared ownership properties and affordable rented properties.

This option assumes that the 40% requirement for affordable housing would be split across both Plot 1 and Plot 2.

Option 2b – Market housing with 40% affordable requirement confined to the northern housing plot

This option is based on disposing of some of the surplus playing field land for market housing. A valuation report was commissioned by Poole Housing Partnership and drawn up on the basis of taking into account the local planning requirement of 40% affordable housing on any new scheme, with these properties made up of a combination of sheltered accommodation, shared ownership properties and affordable rented properties.

This option assumes that the 40% requirement for affordable housing units would only be located on Housing Plot 1, with all 35 housing units on Housing Plot 2 being given over to private housing.

Summary of housing models

The different disposal models for the residential land present different advantages and disadvantages, which are set out in the table below:

Option	Advantage	Disadvantage
Option 1a	<ul style="list-style-type: none">- Large amount of affordable housing provided- Would work in partnership with the strong social housing management presence already on the estate that could help with community cohesion	<ul style="list-style-type: none">- Lower receipt generated
Option 1b	<ul style="list-style-type: none">- Large amount of affordable housing	<ul style="list-style-type: none">- Lowest receipt generated

	provided - Already has a strong social housing management presence on the estate that could help with community cohesion	
Option 2a	- Higher receipt generated	- Smaller number of affordable housing units
Option 2b	- Highest receipt generated	- Smaller number of affordable housing units

A key decision needs to be made regarding which housing disposal model is adopted. Details of the estimated receipts can be found at Appendix A3, with the impact of this on the funding strategy detailed at Appendix A2.

Other Funding Sources

Additional funding sources have been identified, a summary of which can be found in the Financial Strategy at Appendix A2

11.4 Cost summary

A summary of the available funding and a proposed financial strategy is set out in Appendix A2.

A key decision needs to be made as to whether to adopt the recommended Financial Strategy included at Appendix A2 to fund a new build 2FE Hillbourne Primary School.

12. PROGRAMME AND PHASING

12.1 Project phasing

One of the key drivers for developing the new build primary school in the centre of the site is to ensure that the existing buildings are able to remain in operation during the construction period so that the disruption to education can be minimised, reducing the costs needed for temporary accommodation during construction, and shortening the construction period through the use of a modular building. An indicative phasing plan has been developed to detail how this will work in practice, as well as indicating the timescales and order in which the existing buildings can be demolished and the sites that they sit on released for the development of the residential plots.

The indicative phases are as follows:

1. Re-provide existing car park within the retained Acorns site, using Tufftrak Trackway
2. Establish contractor's site compound on the location of the existing car park
3. Establish new MUGA, which can be utilised by the school during the construction of the new building
4. Establish protected walkway between the two schools with Heras fencing, with manned crossing points as required
5. Construct new school
6. Decant into new school
7. Demolish Acorns and Little Acorns buildings
8. Residential Plot 2 is available for disposal
9. Construct new car park and formal soft play – school to use the northwest of the site as a playing field while the formal soft play establishes
9. Demolish the Oaks Building and Waterloo Youth Centre
10. Residential Plot 1 available for disposal

A phasing diagram is included at appendix B.

12.2 Indicative programme

An indicative programme has been produced.

An August 2019 start on site date is dependent on the approval for the Masterplan being granted by Cabinet on 31st October 2018, by Council 30th November 2018, and Section 77 approval is granted by the DfE by April 2019.

- **April 2019** Planning approval granted
- **July 2019** Appointment of contractors
- **August 2019** Start on site
- **August 2020** Complete new build Primary School
- **August 2020** Demolish Acorns Building
- **October 2020** Handover Residential Plot 2
- **October 2020** Demolish Oaks Building and Waterloo Youth Centre
- **November 2020** Handover Residential Plot 1A (Northeast of the site)
- **October 2021** Handover Residential Plot 1B (Northwest of the site)

A full indicative programme is available at Appendix E

12.3 Project risks

A project risk register has been included at Appendix F

A number of technical and construction risks have been identified, along with their probability, potential impact on cost, potential impact on time, and potential impact on performance.

Along with the construction and technical risks (which will be further developed during the detailed and technical design stages should the project be approved) there are a number of key strategic project risks that could have a significant impact on the project timeline. These risks are:

Risk	Mitigation
Planning – not able to get planning approval	Pre-application submitted to planning, with options presented based on initial engagement with planning and transportation. A meeting has been scheduled with Strategic Planning in order to discuss the residential design from an urban planning perspective. Representation from Strategic Planning on the Strategic Programme Board.
Stakeholder objections – objections to the proposals from external stakeholders	Meetings have been held with a number of stakeholders, including Youth Services, Twin Oaks Nursery, Ward Councillors and the School in order to discuss the proposals and try to incorporate their suggestions into the design. Should the Master Plan be approved, a Community engagement event will be organised for parents and carers of pupils at Hillbourne Primary School and local neighbours.
Section 77 approval – the Secretary of State does not grant Section 77 approval for disposal of the school land or the decision delays the programme	The Education and Skills Funding Agency have previously been engaged on this project when there was a proposal to locate a free school on the site, during which time they gave indications that they would be open to a Section 77 application for the site. Correspondence has been sent to the DfE making enquiries as to the timescales involved in this process.
ESFA – the ESFA get involved in the project at a late stage by providing funding and ask for full feasibility study.	The design team have worked on the basis of preparing these proposals in line with ESFA guidelines for feasibility reporting; this includes standard format, outline specification, and development proposal.
Unrealistic design and procurement programme – short design and procurement timescales mean that programme is unable to meet summer 2018 start on site	Consideration will be given to retaining the design team through the current framework to expedite the quickest design solution, thus minimising the investment needed in the existing buildings.
Delayed approvals – delays in expected Council decision timescales lead to delays in proposed programme	Meetings have been scheduled with Portfolio holder and ward members to present Master Plan proposals. Members have previously approved the outline business case.
Covenants on land – legal covenants lead to delays in disposal or an increase in costs	A full title search has been completed. Borough of Poole has previously changed the use of land belonging to the Wimborne Estate that used similar covenants so has experience in dealing with these matters. A budget estimate for these costs has been included in the risk register.
Housing receipts – the surplus playing field land disposed of for housing does	A line has been included in the financial strategy to demonstrate that a 20% fall in land prices would still leave all four proposed housing schemes as financially viable. The cost estimates have been prepared by trusted external valuers who

not generate the anticipated level of receipt.	have experience in providing this service to the Borough of Poole on previous schemes.
Sprinklers – a sprinkler assessment shows that a sprinkler system is required for the new build primary school.	An allowance for a sprinkler system has been allowed in the budget as detailed in the school costs at Appendix A1. All four housing schemes are still financially viable if this cost is included in the budget.
Local Plan – the emergent local plan is not adopted, which means that the urban green space designation is not lifted from the land.	If the Local Plan is not adopted and the urban greenspace designation remains in place, a planning strategy would need to be developed to ensure the scheme can proceed within the scope of current planning policy provisions. The existing policy position for urban greenspace requires that where such land is proposed to be lost, replacement greenspace of equivalent or greater area and value would need to be provided in the locality to the development site. It should be recognised that to bring forward replacement greenspace within Poole will be challenging given the borough's compact nature although a feasibility study would need to be undertaken to see if any opportunities exist. If there are no deliverable opportunities for replacement greenspace, then the local planning authority would consider the proposal as contrary to policy and any subsequent planning permission be taken as a departure from adopted planning policy. To ensure that the local planning authority would be prepared to grant a departure from adopted policy will require a clear justification as to the overriding benefits that would arise from the proposed development to demonstrate that there are material considerations that weigh in favour of granting planning permission. It is recommended that this justification is agreed with the local planning authority prior to the submission of a planning application. It will also be essential to secure Sport England's support for the proposed development (whether the emerging Local Plan is adopted or not) to avoid the proposal being called in for decision by Secretary of State.

12.4 Procurement Strategy

In order to achieve the dates detailed in the indicative programme it is assumed that a Modular Building Framework will be used to procure the new build school and an Off-Site construction method will be used. Therefore it is recommended that a design and build solution is procured in collaboration with the Strategic Procurement Team.

A more detailed review of the procurement strategy will be undertaken following member approval to proceed with the project.

13. COUNCIL RESOURCES

This project will require resources from a number of different service units in order to achieve successful outcomes. The project will be delivered by BCP and therefore resourcing needs to be considered within the wider context of the organisational and personnel changes that may arise as part of Local Government Reorganisation.

13.1 Legal and Democratic Services

- Entering into consultant and contractor contracts following the completion of the procurement. Support will be required at stages of the procurement and contracting process and possibly post contract if any legal issues arise.
- Legal advice will be required in how ensure that the covenants on the land are not an impediment to the development of the new build Primary School or residential development.
- Legal advice will be required in drafting the new lease for the pre-school.
- Legal advice will be required during the process of disposal of the surplus playing field land for residential development.

13.2 Financial Services

- Building Capital Team – Project Management and Project Support for the school build will be required from the Building Capital Team. Oversight of the project management will be provided by Principal Asset Planning and Development Manager.
- Corporate Estates – this project will require the support of Estates in the disposal of the surplus playing field land, creating new property records and drawing new boundaries. Advice will be needed in drawing up a new lease for the pre-school.
- Strategic Procurement – a procurement strategy will need to be developed and support will be needed for the procurement of the consultants and the contractor.
- Accountancy – Capital Project Programme boards will be supported with budget monitoring undertaken throughout the building phase. Treasury management support will be required in arranging short and long term finance for the capital scheme. A cash flow plan will have to be drawn up in conjunction with Housing and Community to determine how the capital receipts for the residential plots will be used to fund the capital project.

13.3 Housing and Community

- The Head of Housing and Community will be the Senior Responsible Officer for the housing project.
- Housing and Community will manage the disposal of the residential land to a housing association, Poole Housing Partnership or to the market.

13.4 Children, Young People and Learning

- The Head of Children, Young People and Learning will be the Senior Responsible Officer for the school build project.

13.5 Corporate Communications

- A communications plan will have to be drawn up if the project is approved by Council and proceeds to the next stage.

14. EQUALITIES STATEMENT

An equalities impact statement is included as Appendix J.

15. CONCLUSION

15.1 Summary

Following the approval of the Outline Business Case by Council in February 2018, a Full Business Case was undertaken in order to further investigate the costs and possible funding sources for Masterplan.

A range of site surveys were undertaken and a planning pre-application submitted for the Hillbourne site Masterplan. A concept design has been developed for the school and pre-school, taking the information from the surveys and the feedback from the pre-application into account. A detailed schedule of costs for the facilitating works and new build school has been prepared.

A number of designs for the residential developments proposed on the surplus playing field land were worked up based on the information provided by the surveys. Pre-application feedback has indicated residential option SK05 would be acceptable to Planning and an estimate of the level of receipts that this development would generate has been prepared. The level of receipt generated is dependent on the housing model that is agreed.

A funding strategy has been drawn up in Appendix A2, showing how the cost of a new build Primary School and pre-school could be met by the funding sources available to the Council.

If the Hillbourne Masterplan is approved a Section 77 application would need to be made to Secretary of State for Education for disposal of the school playing field land.

15.2 Recommendations

Following the conclusions of the Full Business Case, recommendations have been included in the 30th October 2018 report to Cabinet.

15.3 Proposed Next Steps

If the Hillbourne Masterplan is approved, the following next steps will be undertaken:

1. A Section 77 application will be made to the secretary of state for the disposal of school playing field land.
2. Estates to make contact with the representatives of the Wimborne Estate in order to overturn the education covenant on the surplus playing field land.
3. Hold a community engagement event in consultation with Corporate Communications for parents and carers of pupils at Hillbourne Primary School and the local community to discuss the Masterplan.
4. Work in consultation with Strategic Procurement to draw up a procurement strategy for the Masterplan project.

5. Work with strategic planning on the urban design of the residential developments and submit a planning application.