

Post- Lowbrook Academy Expansion Project Timeline of Facts

18th April 2016

National Offer Day. Based on an intake of 30, and in-line with our former admissions procedure, as predicted and previously demonstrated to RBWM, zero catchment children were offered a place at Lowbrook Academy.

27th April 2016

Dave Rooney on behalf of Lowbrook Academy wrote to Alison Alexander (Managing Director, RBWM) to make her aware of the admissions situation and to ask for support from the Local Authority to expand our provision.

16th May 2016

Meeting took place with Dave Rooney and Kevin McDaniel (Head of Schools RBWM) whereby he requested Lowbrook Academy admit an additional 30 children for the 2016-17 academic year. He also requested Mr Rooney investigate how Lowbrook Academy could realise its vision of becoming a two form entry school.

23rd May 2016

Lowbrook Academy responded to the above-mentioned request with an outline proposal consisting of two phases (***please refer to letter posted on school website 'Lowbrook Academy Letter to RBWM - 23rd May 2016' for details.***)

27th May 2016

Response to Lowbrook Academy's proposal was received from Alison Alexander outlining an investment amount of £1.6m (***please refer to letter posted on school website 'Letter from RBWM – 27th May 2016' for details.***) The school recognised upon receipt of this letter that the amount would be insufficient.

2nd June 2016

Email from Councillor Dudley confirming: "We are supporting of 'quality' space and will share the downside risk of ultimate tender prices with you. I understand you will put ~£50,000 'at risk' with RBWM taking the balance of the competitive tender price risk **over and above the currently approved spending limit.**" (***please refer to email posted on school website 'Email from Cllr Dudley 2nd June 2016'***)

3rd June 2016

Meeting called by Theresa May with Dave Rooney, Kevin McDaniel and Pauline Reid (School Business Manager) present. Discussions took place regarding the Lowbrook Academy expansion project and the funding proposed by RBWM. It was made clear at this meeting that the proposed funding was insufficient for the scale of this project. The calculations used in Alison Alexander's letter of 23rd May 2016



used an approximate cost per place of £13,400 which falls below the national average cost per place for primary school expansion of £13,700 and does not allow for further expenses related to the expansion taking place on a land-locked site ***(please refer to letter posted on school website 'Lowbrook Academy Response to RBWM - 17th March 2017' for further details regarding per place expansion costs).***

August 2016

Completion of the remodelling of ICT Suite/Library into a temporary classroom over the summer holidays. This enabled Lowbrook Academy to accommodate the extra 30 reception pupils in September 2016.

30th September 2016

Meeting with Phil Grover and Andrew Watson (Thompson, Roddick & Laurie), Kevin McDaniel (RBWM), Dave Rooney, Pauline Reid & James Spiteri (School Governor). During this meeting Kevin McDaniel confirmed the hall location and agreed siting. He stated he would report the shortfall in funding to his team and acknowledged the hall was not excessive ***(please refer to 'Thomson, Roddick & Laurie (TRL) Meeting Minutes' on school website: point 4.4 of minutes dated 30.09.16; email from architect Phil Grover 'Thomson Roddick and Laurie Email 17th March 2017'; and witness statement 'Thomson Roddick and Laurie Witness Statement 25th April 2017')***

17th October 2016

Meeting with Phil Grover (Thompson, Roddick & Laurie), Kevin McDaniel (RBWM), Dave Rooney & Pauline Reid. During this meeting Kevin McDaniel advised that he had reported the funding shortfall back to his team who had raised questions regarding the hall and the style of the build. In response to all questions, Kevin McDaniel was in agreement with the school confirming the following:

'- Was an additional hall necessary? KM confirmed this was required.

- Was the new location appropriate? KM confirmed this was, noting also that his team recognised the previous location created complex issues for construction, building within an operating school and could not offer cost assurance.' ***(please refer to 'Thomson, Roddick & Laurie (TRL) Meeting Minutes' on school website: point 3.1 of minutes dated 17.10.16).***

Kevin McDaniel confirmed that although the funding shortfall had yet to be resolved, once the design had been agreed the scheme should be lodged for a Pre-Application discussion with RBWM Planners ***please refer to 'Thomson, Roddick & Laurie (TRL) Meeting Minutes' on school website: point 4.2 of minutes dated 17.10.16).***

October 2016	Building works commenced on the construction of a permanent classroom adjacent to the school car park and Year 5 classroom. Whilst this classroom was intended for completion in March 2017, some structural complications arose which have now been resolved and completion is due by the end of this academic year. This classroom will replace the temporary space created by the remodelling of ICT Suite/Library for academic year 2016-17.
8th December 2016	Councillor Simon Dudley visited Lowbrook Academy to again view the expansion plans. During this meeting he was made aware by Dave Rooney, Bianca Iasi (Head of School), Pauline Reid and Dominique Du Pre (Chair of Governors) about the funding shortfall. However he agreed it was a good scheme and was committed to, "make this happen."
14th December 2016	Councillor Natasha Airie (Lead Councillor for Children's Services) and Kevin McDaniel visited Lowbrook Academy so that Cllr Airie could view the expansion plans and discuss the project with Dave Rooney. At this meeting she commented on the outstanding provision Lowbrook Academy provides and approved of the expansion plans.
19th December 2017	A follow-up letter was sent by Lowbrook Academy to Cllr Dudley, again outlining Kevin McDaniel's involvement and providing actual costs for the remodelling of the temporary classroom and build of the permanent classroom, plus a QS Estimate Report for a 4-classroom block and hall (<i>please refer to letter posted on school website 'Lowbrook Academy Letter to Cllr Dudley – 19th December 2016'</i>).
6th January 2017	An email was received from Kevin McDaniel stating: "the internal budget group...have asked me to prepare public papers asking for formal approval for the financial commitment you have sought (this is good news). They are in support of the sports hall design and plan to say that in the paper." (<i>please refer to email posted on school website 'Email from RBWM - 6th January 2017'</i>).
30th January 2017	Ann Pfeiffer (Service Leader – School Places & Admissions, RBWM) asked TRL for a full project breakdown indicating a change of project leadership at RBWM.
27th February 2017	A letter was sent by Lowbrook Academy to Cllr Dudley requesting an update regarding the build and seeking financial reassurance. It was in this letter we highlighted that delivery milestones were becoming increasingly tight and advised Cllr Dudley that Ann Pfeiffer had issued the instruction to go to tender prior to receiving planning consent (<i>please refer to letter posted on school website 'Lowbrook Academy Letter to Cllr Dudley – 27th February 2017'</i>).

8th March 2017	A letter was received from Kevin McDaniel on behalf of the council in response to Lowbrook Academy's letter to Cllr Dudley on 27 th February 2017. The contents suggested that the "decision to provide a further £0.75m of capital funding from local resources is one that has to be taken to full council." <i>(please refer to letter posted on school website 'Letter from RBWM - 8th March 2017').</i>
10th March 2017	A response letter from Lowbrook Academy was subsequently sent to Kevin McDaniel, together with the original expansion brief to re-clarify the project phases. The school advised RBWM that they are not in a position to take 30 pupils in September 2017 while Phase II is at risk and that the school is not in a position to cover additional costs <i>(please refer to letter posted on school website 'Lowbrook Academy Response to RBWM – 10th March 2017')</i>
13th March 2017	Cllr Ross McWilliams contacted Dave Rooney by telephone to notify him that Cllr Dudley would be advising his members to take a conscience vote (free vote) at Cabinet on the additional funding for Lowbrook Academy rather than a whipped vote.
14th March 2017	An Extraordinary Governors Meeting took place at Lowbrook Academy with Cllr Ross McWilliams also present. The Governors were fully briefed regarding the situation with the conscience vote stance by Cllr Dudley. Cllr Ross McWilliams explained to Governors that a paper was being prepared for discussion at a Group Meeting being held on 20 th March. He advised that the paper would be circulated on the 17 th March to all group members therefore Lowbrook would receive a draft on the 15 th /16 th March in order to respond as an Appendix to the report <i>(please refer to minutes posted on school website 'Lowbrook Governors Extraordinary Meeting Minutes 14th March 2017')</i> .
16th March 2017	At 18:00hrs Lowbrook Academy received the paper via email by Kevin McDaniel and were requested to respond by the following day.
17th March 2017	Lowbrook Academy responded to the paper entitled 'Additional Capital for Lowbrook Academy', highlighting a number of factual inaccuracies <i>(please refer to letter posted on school website 'Lowbrook Academy Response to RBWM - 17th March 2017')</i> .
20th March 2017	Conservative Group Meeting took place.
21st March 2017	An Extraordinary Governors Meeting took place at Lowbrook Academy to update Governors following a telephone conversation between Cllr McWilliams and Dave Rooney regarding the Conservative Group Meeting the evening before.

Ross McWilliams had indicated that it appeared that the Council was extremely unlikely to agree the additional funding required for Phase II of the expansion scheme (***please refer to minutes posted on school website 'Lowbrook Governors Extraordinary Meeting Minutes 21st March 2017'***).

22nd March 2017

A meeting took place with Cllr Dudley and Dave Rooney whereby Cllr Dudley advised that due to the unlikelihood of members agreeing the additional funding he would be pulling the paper from the Cabinet Meeting and would instead like to propose to loan the Academy the additional funding of £0.75m repayable over 25 years.

A subsequent Extraordinary Governors Meeting took place at Lowbrook Academy that evening with Cllr Dudley in attendance to explain the loan proposal to the Full Governing Body, which was as follows:

- To increase the remaining RBWM contingency from £50k to £100K
- To add this to the school's contingency of £50k giving a total of £150k.
- To provide an interest free loan over 25 years on the remaining shortfall which was then likely to be in the region of £600k.

There was some dispute in this meeting regarding the contingency as Lowbrook maintained the original agreement with RBWM was a £200,000 contingency plus £50,000 school contingency. This was later clarified and reconfirmed in a subsequent email from Cllr Dudley dated 28th March 2017.

The meeting concluded with Governors unanimously deciding that the school is not in a position to take on borrowing of any amount nor did the Governors wish to reduce the size of the scheme or value engineer it in any way to compromise the education of the Academy's existing pupils. The Academy would also seek independent advice by their accountants Macintyre Hudson (***please refer to minutes posted on school website 'Lowbrook Governors Extraordinary Meeting Minutes 22nd March 2017'***).

28th March 2017

Following an affordability review from accountants MacIntyre Hudson, (***please refer to letter on school website 'MacIntyre Hudson Financial Statement 28th March 2017'***) Lowbrook Academy responded to decline Cllr Dudley's loan proposal (***please refer to letter on school website 'Letter to Cllr Dudley – 28th March 2017'***).

Rt Hon. Theresa May MP was also notified (*please refer to letter on school website 'Letter to Rt Hon Theresa May MP – 28th March 2017'*); support was also requested by our local councillors, Cllr Ross McWilliams and Cllr Paul Brimacombe (*please refer to letters on school website 'Letter to Cllr Ross McWilliams – 28th March 2017' and 'Letter to Cllr Paul Brimacombe – 28th March 2017'*); and the school parents were notified of the school's new position regarding expansion to two-form entry (*please refer to letter on school website 'Parent Letter 28th March 2017'*).

29th March 2017

Kevin McDaniel contacted the school requesting a short notice meeting which was attended by Dave Rooney, Margaret Brown and Pauline Reid at 10am. During this meeting, Kevin McDaniel stated that the Council believed that the initial capital funding commitment to support classrooms and an additional 167m2 of hall space was a viable school configuration. He therefore proposed RBWM would increase their contribution to the current scheme recognising the likely costs of the commitment to a 167m2 hall, leaving an estimated budget shortfall of £0.5m which he proposed take the form of a 25-year loan. The proposal put forward in this meeting was followed up by letter (*please refer to letter on school website 'Letter from RBWM - 29th March 2017'*).

31st March 2017

A Full Governing Body Meeting took place at Lowbrook Academy following RBWM's revised proposal. Also in attendance was Cllr Ross McWilliams, Cllr Paul Brimacombe, Anna Smith (Head of School, Holy Trinity CofE School Cookham), Yasmin Thorn-Davis (Chair of Governors, Holy Trinity CofE School Cookham). The Governors expressed their concern and disappointment that the additional funding required for the scheme had not been agreed by RBWM and that the school were instead being asked to take a loan for the shortfall, which it could not afford to do. The size of the 167m2 hall was discussed and how it fell below the government guidelines (250m2 +/-30m2). The governors unanimously agreed that they would not be prepared to accept a loan of any amount from RBWM due to the short and long term financial risks to the Academy as identified by McIntyre Hudson at the Finance, Sites and Buildings Committee meeting in November 2016 and again in their financial affordability review statement produced for the Governors in March 2017 (*please refer to minutes posted on school website 'Lowbrook Full Governors Meeting Minutes – 31st March 2017'*)

Following the Full Governing Body Meeting, Cllrs Ross McWilliams and Paul Brimacombe met with the school's

parents with siblings who would not be offered a place at Lowbrook Academy in 2017 with a PAN of 30.

A follow-up letter was sent to Kevin McDaniel from Lowbrook Academy's Chair of Governors to outline the school's position ***(please refer to letter on school website 'Lowbrook Academy Response to RBWM - 31st March 2017')***

3rd April 2017

Response received from Kevin McDaniel, RBWM stating that the council is prepared to work with the Academy to deliver the expansion including the hall as currently designed only if:

- they take overall responsibility of the scheme
- the school to agree to an increased and fixed financial contribution of £250,000.

This letter was placed by RBWM in the public domain at the same time as the school received it on the first day of the school's Easter holiday. Consequently, key members of staff and school Governors were on annual leave ***(please refer to letter on school website 'RBWM letter 3rd April 2017')***.

18th April 2017

An Extraordinary Governors Meeting took place at Lowbrook Academy to update Governors following RBWM's latest proposal. After in-depth discussions and analysis of financial risk, the Governors voted unanimously to decline the offer.

19th April 2017

A response letter was sent to Kevin McDaniel ***(please refer to letter on school website 'Lowbrook Academy Response to RBWM - 19th April 2017')***.

Call for Action

1. The expansion project is fully funded by either the local authority or the EFA.
2. The school has a hall large enough for 420 pupils plus staff to meet.
3. The development of the expansion will have a joint steering group ensuring unnecessary compromises are not made.
4. Due to having surpassed key- milestone dates for this expansion project, the Local Authority will agree to fund a solution for thirty year 6 pupils who will need to be educated off-site for an extended period of time until the expansion building work is completed