|  |
| --- |
| Post-occupancy Evaluation Formfollowing a capital development including acquisition required as a condition of consent by the Chief Executive of Skills Funding (the Agency) |
|   |  |
| Date of issue | **October 2014** |
|  |  |
|  |  |

**Please complete this form in accordance with the Post Project Occupancy Evaluation Guide.**

The Agency is required to account for the public investment made in the further education estate and the impact it has made. Therefore, as a condition of capital grant, the Agency usually requires a post-occupancy evaluation. The minimum information required is requested in this form but if you have carried out a more detailed evaluation, please also supply that.

Please email a signed copy of the form and supporting information to propertyservices@sfa.bis.gov.uk.

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Organisation Details**

|  |  |
| --- | --- |
| **Organisation name** |  |
| **Organisation address** |  |
| **Contact name and job title** |  |
| **Contact telephone number(s)** |  |
| **Email address** |  |

**Project Details**

|  |  |
| --- | --- |
| **Agency project reference number** |  |
| **Project title** |  |
| **Date of the review** |  |
| **Date presented to governors** |  |
| **Project address and location** |  |
| **Description** | Summary of the intended achievements (please refer to the three specific, measurable, achievable, realistic and time framed (SMART)) objectives/outputs in the approved application) |

**Section 1: Project Costs**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Total project cost** | (Include fees, VAT and acquisition costs, if applicable.)**Table 1: Total Project Cost**

|  |  |
| --- | --- |
| **As at approved application (£)** | **Final outturn cost (£)** |
|  |  |

 |
| **Project cost breakdown**  | Complete the [elemental cost breakdown templates](https://www.gov.uk/government/publications/sfa-capital-funding-evaluation-and-use-of-capital-grant-forms) for both new build and/or refurbishment as applicable. Explain any significant variances from the tendered costs. |
| **Project development costs (professional fees)** | Briefly outline the professional fees involved in the project and how the expected fees compare with actual fees associated with the professional services on the project. (Refer to the RIBA Plan of Works 2013 publication.)**Table 2: Project development cost (professional fees)**

|  |  |  |
| --- | --- | --- |
| **Professional services (fees) associated to RIBA Plan of Works Stages** | **Expected – as at application approval stage** | **Actual** |
|  |  | **£** | **% of total project cost** | **£** | **% of total project cost** |
| **1** | **Preparation and Brief** |  |  |  |  |
| **2** | **Concept Design** |  |  |  |  |
| **3** | **Developed Design** |  |  |  |  |
| **4** | **Technical Design** |  |  |  |  |

 |
| **Contractor and consultants** | Provide a brief review of the performance of both contractor and consultants:  |

**Section 2: Gross Internal Area**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Gross Internal Area (GIA)**  | **Table 3: Gross Internal Area (GIA) affected by the project**

|  |  |  |
| --- | --- | --- |
| **GIA (m2) before project** | **GIA (m2) affected by project** | **GIA (m2) after project** |
| [ ]**m2** | **New build GIA:** | [ ]**m2**  | [ ]**m2** |
| **Acquired GIA:** | [ ]**m2**  |
| **Refurbished GIA:** | [ ]**m2**   |
| **Demolished GIA:** | [ ]**m2** |
| **Vacated GIA:** | [ ]**m2** |

If the areas differ from those at approval, please explain. |
| **Area improved by project** | Complete the table below to show the area of estate in condition A, B, C and D (using eMandate definitions) before, anticipated and actual after the project.**Table 4: Impact of Project on Condition of Estate (GIA)**

|  |  |  |
| --- | --- | --- |
| **Condition of estate BEFORE project** | **Anticipated condition of estate on completion** | **Condition of estate AFTER project** |
|  | **m2** | **%** |  | **m2** | % |  | **m2** | **%** |
| **A:** |  |  | **A:** |  |  | **A:** |  |  |
| **B:** |  |  | **B:** |  |  | **B:** |  |  |
| **C:** |  |  | **C:** |  |  | **C:** |  |  |
| **D:** |  |  | **D:** |  |  | **D:** |  |  |
| **Total** |  |  | **Total** |  |  | **Total** |  |  |

 |
| **Space utilisation** | How has the project impacted on space utilisation? |

**Section 3: Project Programme**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Programme** | **Table 5: Project programme**

|  |  |  |
| --- | --- | --- |
|  | **Planned as in approved application** | **Actual** |
| **Date contract let** |  |  |
| **Date started on site** |  |  |
| **Date of practical completion** |  |  |
| **Date of client occupation** |  |  |

Explain any significant variances and complete the Post Occupancy Evaluation monthly expenditure template: <https://www.gov.uk/government/publications/sfa-capital-funding-evaluation-and-use-of-capital-grant-forms>  |

**Section 4: BREEAM Assessment**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **BREEAM** | The expectation is that new build will achieve ‘Excellent’ and refurbishments will achieve ‘Very Good’. **Table 6: BREEAM rating**

|  |  |  |
| --- | --- | --- |
|  | **Target BREEAM rating as in approved application** | **Actual BREEAM rating achieved** |
| **New build** |  |  |
| **Refurbishment** |  |  |
| **Overall** |  |  |

Provide a copy of any assessment or certificate. If the BREEAM rating fell below that which was anticipated in the application, please provide an explanation. |

**Section 5: Sustainability**

|  |  |
| --- | --- |
| **Please provide details to compare before and after project.** | Confirm how the project has contributed to the organisation’s carbon reduction plan or footprint, as outlined in the application, and whether the college has been awarded any ISO 14001 or similar since submitting the application. |

**Section 6:**

**Benefits to learners, employers, local community and supporting economic growth - how the project has met the key criteria set out in Annex A of the** [**FE College Capital Investment Strategy**](http://www.bis.gov.uk/assets/biscore/further-education-skills/docs/F/12-1340-further-education-college-capital-investment-strategy-plan)**.**

**In the responses to the information requested in this section, it is important to refer to the learner number table and to include quantifiable measures, as appropriate, to assist with an objective assessment of your post occupancy evaluation.**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Impact on Growth:****Learner numbers** | Complete the table below to show the number of learners that will benefit from the project. **Table 7: Learner numbers**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Learner numbers before project** | **Projected learner numbers after project** | **Actual learner numbers post project** |
| **14 to 16** |  |  |  |
| **16 to 19 Education Funding Agency (EFA)** |  |  |  |
| **Adult Skills Classroom-based** |  |  |  |
| **16 to 19 Apprenticeships** |  |  |  |
| **Adult (19+) Apprenticeships** |  |  |  |
| **Adult Skills Workplace** |  |  |  |
| **Total** |  |  |  |

 |
| **Tackling unemployment and young people not in employment, education or training (NEETs):** | Brief outline of how the project has had a positive and measurable impact to tackle (200 words maximum): * 16 to 24 unemployment
* adult unemployment
* NEETs
* Skills shortages
* Working with Local Enterprise Partnerships (LEPs)
 |
| **Expanding and growing Apprenticeships and employer engagement:** | Brief outline of how the project has supported the expansion and growth of Apprenticeships and employer engagement, with particular reference to (200 words maximum): * how the project has had a positive and measurable impact on increasing and expanding 16 to 18 and 19 to 24 Apprenticeships
* how the project has supported the provision of enhanced progression routes to higher-level training, including higher-level Apprenticeships
* how the project has supported the business and skills requirements of employers, particularly small- and medium-sized enterprises (SMEs)
 |
| **Improving the quality of teaching and learner success:** | Brief outline of how the project has supported measurable improvements in (200 words maximum): * the quality of teaching and learning
* Ofsted – pre- and post-project
* Learner success rates – pre-and post-project
* the project’s curriculum areas
* the overall rates for the college
 |
| **Other relevant information**  | (100 words maximum) |

**Section 7: Financial Value for Money and Affordability**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Investment Appraisal and running costs:** | Re-run the investment appraisal at the 12-18 month review point using actual operating cost information and explain variations to the appraisal at approval stage. Complete the [investment appraisal template](https://www.gov.uk/government/publications/sfa-capital-funding-investment-appraisal-template)and submit with this form. Explain how the project has impacted on your organisation’s financial health (either positively or negatively), and how this compares to the forecast impact at the time of the project approval.Complete the table below to show a comparison between the forecasted and actual premises costs and savings over a 20-year-period for the project:**Table 8: Running cost and savings**

|  |  |  |
| --- | --- | --- |
|  | **Forecasted****Savings/Cost (£000)** | **Actual****Savings/Cost (£000)** |
| **Premises costs (A)** |  |  |
| **Premises savings (B)** |  |  |
| **Difference (A to B)** |  |  |

 |
| **Project Funding/ Finance:** | Complete the table below to show the comparison of project funding/financing between that expected at application approval stage and actual.**Table 9: Project funding and financing source**

|  |  |  |
| --- | --- | --- |
| **Project funding/financing** | **Expected – as at application approval stage (£)** | **Actual (£)** |
| **Requested Agency funding** |  |  |
| **Provider contribution (cash reserves)** |  |  |
| **Loan finance** |  |  |
| **Disposal proceeds** |  |  |
| **Other public sector grants** |  |  |
| **Other** |  |  |
| **Total** |  |  |

 |
| **Expenditure Profile:** | Complete the [monthly expenditure template](https://www.gov.uk/government/publications/sfa-capital-funding-evaluation-and-use-of-capital-grant-forms) to show how the project expenditure varied between the approved profile and actual expenditure profile. |

**Section 8: Lessons Learnt**

|  |  |
| --- | --- |
| **What would you do again?** |  |
| **What would you do differently or would not do if you were about to start the project again?** |  |
| **College management team:****What was it?****Did it work well?** **What would you change?** |  |
| **Finance – did the funding arrangements meet plans, draw down of funds, VAT liabilities?** |  |

**Section 9: Additional Information**

|  |  |
| --- | --- |
| **Copy of the project post-occupancy evaluation, as submitted to governors.**  | Please provide. |
| **Please indicate if you are prepared to share the post-occupancy evaluation?** **(Yes or No)**  | If yes, do you have any caveats? |
|  | The Agency may request that your organisation participate in supporting a case study of your project and supplying a more detailed evaluation. Please tick the box on the left if you do not wish to participate in a case study. |

**Section 10: Authorisation**

|  |  |
| --- | --- |
| **Organisation name**  |  |
| **Signature****(College Principal/Chief Executive)** |  |
| **Print name** |  |
| **Date** |  |