



School Premises Management Handbook

6. Managing capital projects



Property Consultant

It is not necessary to employ a Consultant for minor work such as the day-to-day repair jobs carried out by a caretaker as part of their normal duties. It is also not usually necessary to employ a Consultant for minor maintenance work carried out by a Contractor. However, minor work does need the advice of a consultant if there are health and safety implications (e.g. working at height, work affecting the means of escape, or work that disturbs the existing structure such as drilling holes in walls which could disturb asbestos). Some minor work may even require statutory approval or notification, such as Building Regulations or the Water Supply (Water Fittings) Regulations.

Schools are strongly advised to employ the services of a professional Property Consultant for all building or maintenance projects other than the works described in the preceding paragraph. A Property Consultant is a professionally qualified surveyor, architect, or engineer, depending on the nature of the project.

A Property Consultant should be engaged to:

- Ensure the appropriate technical specification for the project, which ensures the finished product/building will be compliant and fit for purpose
- Ensure procedural compliance in the delivery of the project – i.e. building regulations, planning permission, the Construction (Design and Management) Regulations (known as the CDM Regulations)
- Manage the development and delivery of the project, including leading the procurement and management of a suitable contractor (with the school being the client for the contractor)

The Property Consultant should be procured in accordance with the school financial procedures. When procuring and appointing, schools should confirm:

1. The Consultant has suitable experience and expertise, including:
 - a. the relevant technical knowledge, including membership of a professional body such as the Royal Institution of Chartered Surveyors (RICS), the Royal Institute of British Architects (RIBA) the Chartered Institute of Building (CIOB) or the Chartered Institute of Building Services Engineers (CIBSE)
 - b. suitable competence of the people directly involved in the project, not just more senior 'project directors'
 - c. knowledge of school environments, including any DfE guidance/Building Bulletins relevant to the project, and including any school specific information
 - d. relevant references for the school to independently verify (not just case studies provided by the consultant).
2. The Consultant has suitable capacity to complete the required work in the required timeframes
3. The Consultant holds relevant insurance (Professional Indemnity and Public Liability) at suitable levels
4. The scope of work for the project is agreed and understood, including who will undertake what actions in relation to contractor procurement/management, statutory approvals, and the 'client' obligations of the school under the CDM regulations will always apply in these cases

5. That the fee proposed by the Consultant (including payment schedule/approach and any final/after defects payment) is understood and acceptable
6. The Consultant is engaged on suitable terms and conditions, including accepting liability for acts or omissions in the design and management process
7. Ensuring in advance there is a budget for paying the Consultant's fees

Contractor

For the tender to procure and appoint a contractor, the school and Property Consultant will need to agree:

- ➔ The specification of the works, including what areas the contractor has discretion to propose alternative solutions
- ➔ The approach to costs (i.e. whether it is fixed cost) and proposed invoice/payment schedule (including any approach to defects/retention period)
- ➔ The responses required from the contractor
- ➔ The evaluation process/scoring matrix

Contractors should be vetted by the Property Consultant, including:

- ➔ Health and safety policy, practice and past performance
- ➔ Operational practices within a school setting
- ➔ Financial stability
- ➔ Membership of trade bodies, including SSIP (Safety Scheme in Procurement)
- ➔ Public Liability Insurance
- ➔ Technical competence (certification/registration)
- ➔ Capacity/competence/approach of key staff
- ➔ Supply chain (if appropriate).

Being an effective client

Being an effective client to the Property Consultant and to the contractor helps the school maximise the chances of the work being delivered on time and on budget and the outcome meeting their expectations. To be an effective client a school should:

1. Be clear about what it is trying to achieve – i.e. the problem it is trying to solve and the improvements it is expecting – and the rationale for this objective
2. Be clear about any constraints that affect the work – i.e. timeframes, operational implications or constraints, budget, etc



3. Provide clarity about decision making (who within school can make what decisions. If this involves Governing Body decisions this should include the dates of their meetings), who can give instructions to the Property Consultant and contractor, and who the day to day contact should be for queries
4. Put sufficient time into the design and scope of work with the Property Consultant to ensure the work meets the school's requirements and expectations, and so the scope (once signed off by the school) needs only minimal or no amendment once it commences, except in response to genuinely unforeseen circumstances
5. Make decisions in a timely manner and communicate them clearly to the Property Consultant and contractor
6. Proactively manage the Property Consultant and contractor within the approach that is agreed for the work, while allowing the Property Consultant and contractor to manage their work
7. Manage engagement and communication with staff, pupils, families, and other site users about the work (before, during and after the works begin on site)
8. Agree the building contract with the contractor seeking professional advice from the Property Consultant
9. Ensure there is a clear programme for delivery of the works and a date for completion
10. Be aware of consequences for the school if the works cannot be delivered in accordance with the programme of works

Delivering the project

The following should be agreed, and be proportionate to the size and complexity of the project:

- ➔ List of decisions that will be required from the school and when
- ➔ The regulations, standards and permissions required for the project, and who is responsible for obtaining them (see Section 7. Regulations, standards and permissions for capital projects)
- ➔ Clarity about reporting and meeting arrangements – both informally (i.e. catch up conversations at start or end of the day) and formally (progress reports and KPI review meetings)
- ➔ Information required with invoices to enable payment
- ➔ Handover and training requirements once the works are completed

Evaluating the project

The school should:

- ➔ Provide formal feedback to the Property Consultant and contractor about their performance
- ➔ Evaluate the project process, including the role of school as client and including feedback from the Property Consultant and contractor, and document any 'lessons learned' to inform future projects
- ➔ Evaluate the outcome when compared to the original scope and objective, both at initial occupation and after a period of time (perhaps a term or, for larger projects, a year) has elapsed



Additional Resources

Traded Services for Schools



www.tradedservices.haringey.gov.uk/contacts

Haringey Governors Online

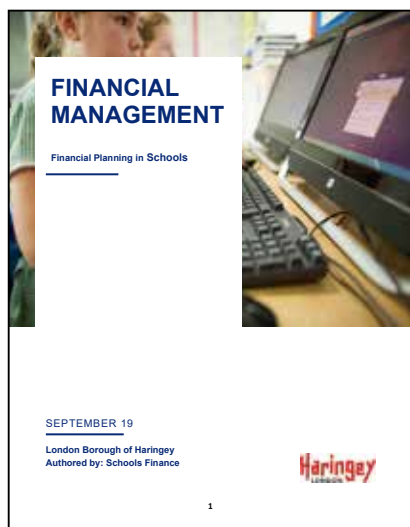


www.governors.haringey.gov.uk

School Financial Procedure Manual

This Manual contains operational guidance for schools' finance and related subjects.

Visit the school finance pages and download your copy at www.haringey.gov.uk



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Every effort has been made to ensure the accuracy of the content of this Handbook at time of publication.