



# Project Planning Guidance (including Project Initiation Document (PID) guidance)

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<b>Title</b>	<b>Project Planning Guidance (including Project Initiation Document guidance)</b>
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Abstract	
<p>This Project Planning guidance is provided to assist local authorities when compiling their Project Initiation Document (PID).</p> <p>This guidance replaces the previous Project Initiation Document Template document used by local authorities in Waves 1 to 3.</p>	

Date	Version	Status	Reason for change
July 2007	New	Final	Revised Issue of Document to reflect Readiness to Deliver, Strategy for Change, Memorandum of Understanding and Remit for Change

This Project Planning Guidance is provided to assist local authorities when compiling their project planning documentation for BSF including their Project Initiation Document. However, this Guidance does not purport to be a comprehensive assessment of all issues that might be raised/be of concern, and local authorities should ensure that they take appropriate professional advice when preparing their Project Initiation Document and other BSF related project planning documentation.

PfS and its advisers accept no liability whatsoever for any expense, liability, loss, claim or proceedings arising from reliance placed upon this Guidance.

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## Introduction

This Building Schools for the Future (BSF) Project Planning Guidance replaces the previous Project Initiation Document (PID) Template document used by local authorities in Waves 1 - 3.

By using this guidance as the basis for their project planning, local authorities will be able to provide the Project Board and other parties with the information they need to establish the project team, monitor progress, make sound decisions and drive the project forward. Further support is available for local authorities from their PfS Project Director and the PfS website ([www.partnershipsforschools.org.uk](http://www.partnershipsforschools.org.uk)), and from the 4ps, local government's project delivery specialists ([www.4ps.gov.uk](http://www.4ps.gov.uk)).

This new guidance is intended to support local authorities in putting place a project planning approach which:

- reflects the new framework for wave 4-6 local authorities, including the Readiness to Deliver (RTD) submission, the Memorandum of Understanding, Remit meeting, and development of the local authority's Strategy for Change (SfC);
- will help local authorities to develop their project management/governance arrangements for inclusion in their RTD submissions, and subsequently address any issues relating to these areas raised in their Remit meeting;
- is relevant to each local authority's individual circumstances; and
- sets out the specific BSF project arrangements for the local authority.

In order to ensure effective corporate ownership, local authorities are encouraged to use existing corporate structures and frameworks to support their BSF programme; for example, corporate approaches to risk, project and budget management.

Wave 4-6 local authorities are expected to have put in place a PID and detailed project plan during the SfC Part 1 stage. It should encompass all of the following:

- a project plan, including key milestones. This should also be available as a separate document to enable effective monitoring, updating at appropriate stages, and regular reporting to the authority's Project Board (examples of such project plans are available from Partnerships for Schools);
- a project management and governance framework with appropriate terms of reference and which includes processes for regular reporting and decision making, and which establishes an appropriate level of delegated authority;
- workstream plans, linked to the overall project plan. These can be included in the PID but should also be capable of being used as standalone documents;
- a risk register which identifies the key risks associated with the project and shows the actions that will mitigate and manage these, together with the named postholder responsible for overseeing each risk. This should be included in the PID, and be maintained throughout the project so that the Project Board can monitor and manage risk going forward;
- a communications plan which identifies the methods of engagement with key stakeholders, including articulation of the 'student voice'. This should be included within the PID, but also be capable of being used as a standalone document;

- a resource/budget plan which sets out the resources required to deliver the project. This must be included in the PID but should also act as a standalone document against which budget/staffing resources can be monitored.

## **Project Initiation Document - Overview**

A local authority's PID should, therefore, bring together in a single document the local authority's project plan, governance and management arrangements, terms of reference, risk management strategy, communications plan and budget/resource plan. It is a key planning document that provides the structure and framework for delivery of the project.

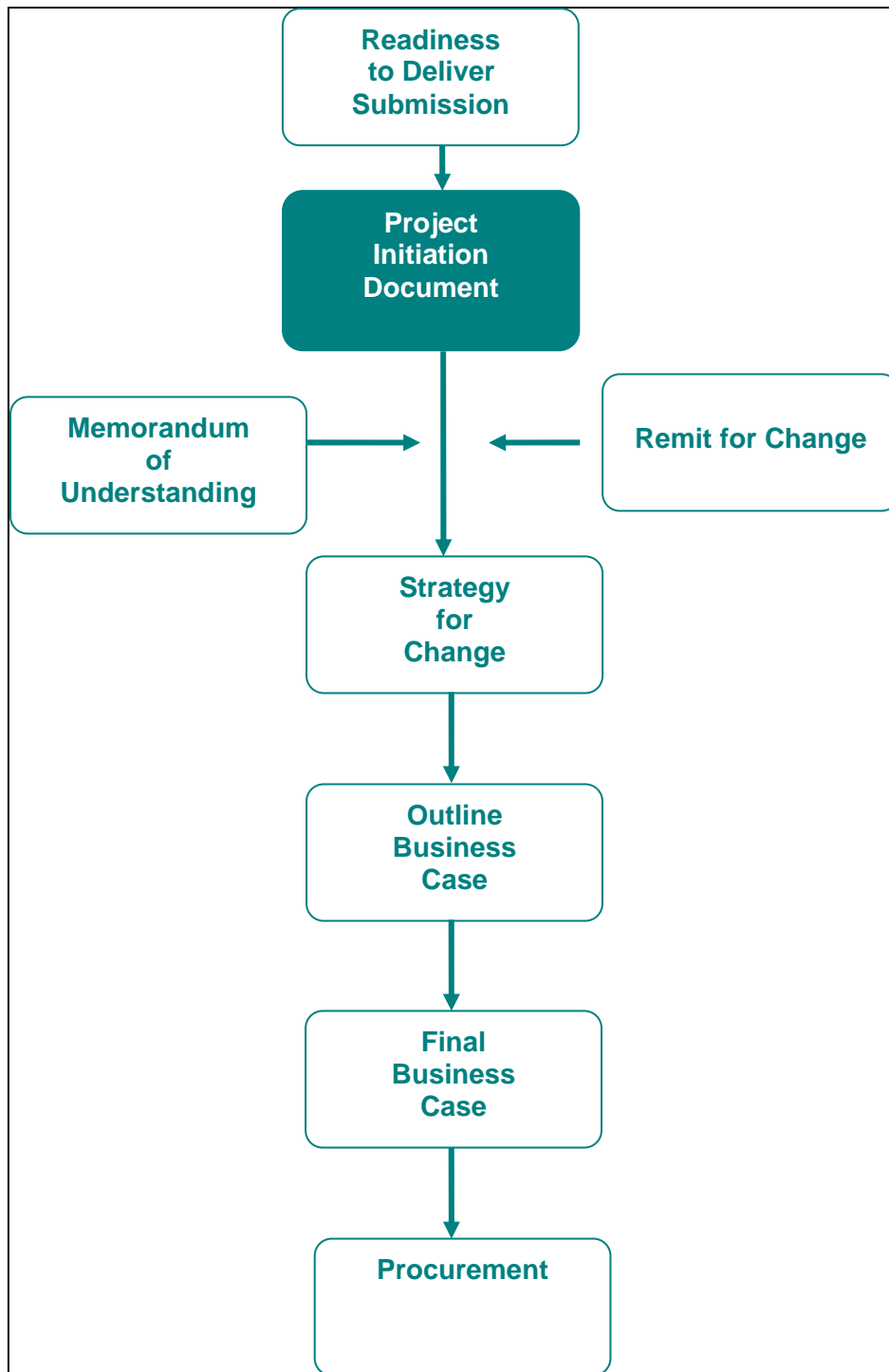
The PID should define the overall purpose and form of the local authority's BSF Project and form the basis for the project's management and assessment, to ensure that:

- the objectives and deliverable outcomes of the project are clearly defined and reflect the key objectives set out in the local authority's 'Strategy for Change' (SfC), including the remit agreed with the DCSF;
- the project reflects the agreement between PfS and the local authority in terms of their respective roles and responsibilities, as described in the Memorandum of Understanding;
- the costs and benefits of the overall project are set out in sufficient detail to enable a high degree of confidence in the deliverability of the project and ensure the Project Board understands the key issues that must be addressed before making a major commitment to the project; and
- the appropriate project governance, management processes, and external advisors are in place to ensure the success of the authority's BSF programme.

The PID should act as the baseline against which the Project Board, Project Sponsor, Project Director and Project Manager and wider stakeholders can assess progress, change management and ongoing viability. It should be treated as a 'live' document that is updated and reviewed regularly.

In particular, local authorities should review the PID at each key milestone (i.e. at commencement/completion of Strategy for Change Part 2, Outline Business Case, Final Business Case) in the project to ensure that it still reflects the appropriate framework, structure, project management and governance to secure the efficient and value for money delivery of the authority's BSF proposals.

The diagram below illustrates the relationship between the PID and the other elements of the BSF planning framework.



The PID should be approved at the earliest possible stage in the project's existence, and certainly by the end of the SfC Part 1 stage, to ensure there is full ownership of the project and its effective delivery, and that the Project Board is given appropriate levels of delegated authority to manage it effectively. This approval of the PID, together with authorisation to proceed with the project, should be sought from the Council's Cabinet/Executive, or the BSF Project Board once it is set up (assuming the Executive has already given it delegated authority to do so). For Wave 4 local authorities this approval may be given after the Remit for Change meeting, but for local authorities in later waves this should be gained before formally entering the BSF programme.

## Project Initiation Document – Detail

The following sections provide guidance on the format and the content to be covered in the PID:

- Section 1: Project Definition
- Section 2: Project Objectives
- Section 3: Project Scope
- Section 4: Project Deliverables
- Section 5: Constraints
- Section 6: Interfaces
- Section 7: Assumptions (can be provided as an appendix)
- Section 8: Project management and governance, project controls and project budget
- Section 9: Project Plan
- Section 10: Communications Plan
- Section 11: Risk register and issues log

Appendices:

- Appendix 1: Project Director Job Description
- Appendix 2: Project Manager Job Description
- Appendix 3: Terms of reference for Project Board and Project Team
- Appendix 4: Memorandum of Understanding
- Appendix 5: Remit for Change
- Appendix 6: Readiness to Deliver submission
- Appendix 7: Process plan

### Section 1: Project Definition

This section should include:

- the high-level strategic objectives set out in the local authority's Strategy for Change;
- how the local authority will address its Remit for Change; and
- the key elements of the Memorandum of Understanding.

### Section 2: Project Objectives

The overall objective of BSF is to transform the educational opportunities of secondary age pupils, through the provision of improved learning environments. The local authority may have other objectives it wishes to deliver through or alongside its BSF programme, such as those relating to its Remit for Change, improvements in integrated children's services, regeneration plans and corporate, local and regional developments. In relation to each of these objectives, it is important to address the following questions:

- What is the local authority seeking to achieve through its BSF programme?
- Why is it important to achieve these objectives?
- How will the outcomes of BSF be measured to confirm they have been successfully delivered?

The local authority should ensure that it sets out in the PID how it will deliver:

- its Strategy for Change, parts 1 & 2, including the key elements of the Remit for Change;
- its Outline Business Case (OBC);
- its procurement to select a private sector partner and establish its Local Education Partnership (LEP) (or, exceptionally, an alternative procurement route that might be agreed by PfS following a period of rigorous examination);
- 'financial close' on the first phase of projects and its Final Business Case (FBC); and
- the internal resources to support the strategic partnering framework in which future phases will be developed (for more detail, see the procurement guidance available at [www.partnershipsforschools.org.uk/guidance.htm](http://www.partnershipsforschools.org.uk/guidance.htm) ).

### **Section 3: Project Scope**

This section of the PID should identify: the schools/educational establishments (including further education providers where appropriate) included in the local authority's first BSF wave; the geographical area covered; and other linked capital investment such as Academies being delivered outside of BSF (if applicable), further and higher education, health, sports, and regeneration and housing projects.

Local authorities should clearly identify those elements of their capital investment plans that are in the scope of the project and those that are outside it. For example, the BSF programme is focussed on secondary schools and the further education sector. However it is possible that, over time, the remit of the Local Education Partnership (LEP), and therefore the overall local BSF programme, may expand to incorporate other educational establishments and services, such as primary schools, children's services, leisure and sports facilities. The local authority's OJEU notice must, in due course, be checked against the local scope to ensure it includes all the services the local authority may wish to deliver via the LEP, as agreed with PfS. Changes in scope may occur as the project progresses and, if so, the changes need be addressed in revisions to the PID.

The Strategy for Change parts 1 and 2 will identify school organisation issues, such as expansions, closures, new schools, consultation and competition arrangements. But as the PID should be a public document, consideration should be given to the timing of specific references in the PID to any school organisation issues likely to require consultation. The appropriate timing and process for such any consultations should be shown in the communications plan.

The Project Scope should set out the local authority's plans for supporting schools with change management that will ensure that transformation in provision and outcomes is delivered. Assumptions regarding the funding available to the project for change management should also be clearly set out.

## **Section 4: Project Deliverables**

This section should identify the outcomes, deliverables and key milestones for the development phase of the project. These deliverables should reflect the key elements of the Remit for Change and the Memorandum of Understanding.

## **Section 5: Constraints**

As with any project there will be constraints and limitations that affect its delivery. In the BSF context these may include funding, resources, time, legal issues (e.g. site ownership), and/or political issues. Any such issues should be identified and described in detail in the Strategy for Change part 2, and be highlighted in this section of the PID. For example:

- Local Learning and Skills Council (LSC) initiatives for post-16 provision that could impact on the plans for BSF, but are not yet fully developed;
- opposition (and its source and rationale) to some of the local proposals, strategies or plans;
- political constraints (and their focus and cause) that need to be overcome;
- existing partnering agreements that the local authority has for the delivery of services or assets, such as strategic and business transformation partnerships, that might limit its ability to deliver its entire BSF programme via the LEP;
- existing contracts with service providers, e.g. ICT, catering, property and asset management, facilities maintenance; and
- intervention arrangements, where some of the local authority's functions have been outsourced.

## **Section 6: Interfaces**

This section should show that the local authority's BSF programme is grounded within the local authority's other initiatives, and that its key partners understand the BSF project's remit and implications. In particular, this section should identify the key interfaces between BSF and other major initiatives locally, and should show how the local authority will deal with these interfaces, ensuring these initiatives support (or at least do not hamper delivery of) their BSF programme:

- strategic partnerships – what parties are involved, what services are being delivered, and what implications this is seen to have for the procurement of the local authority's LEP partner;
- major regeneration and development initiatives, strategies and plans within the locality (housing, universities, etc);
- PE and sports developments;
- any NHS LIFT and other health reconfiguration projects, and their potential synergies with BSF;

- PFI projects;
- cross-border issues with neighbouring local authorities, especially where they may also be in a current BSF wave; and
- opportunities with neighbouring local authorities for joined-up working, partnerships and/or joint LEP developments.

## **Section 7: Assumptions**

Not all of the necessary information or approvals will be available at the beginning of the project, and so this section should log all the assumptions made. For example:

- that educational, technical, financial and legal advisers will be appointed on time (stating when this is expected to take place); and
- that approvals, e.g. school organisation, funding, planning etc, will be given on time and in accordance with the critical path set out in the project plan.

The assumptions log must be appended to the PID and should be regularly reviewed by the Project Board as a standing agenda item.

## **Section 8: Project Management and Governance, project controls and project budget**

This section should describe the project's management and governance structure, project controls and processes, and project budget. It should make reference to the corporate structures and guidance that the local authority has in place for the management of significant projects and programmes.

Further information is available in the 4ps publication *4ps Guidance on Project Governance and Management Structures for BSF Projects*, available at [www.4ps.gov.uk](http://www.4ps.gov.uk).

The project management structure and governance should be agreed by the Council for inclusion in the local authority's Readiness to Deliver (RTD) / Strategy for Change submission, ensuring that:

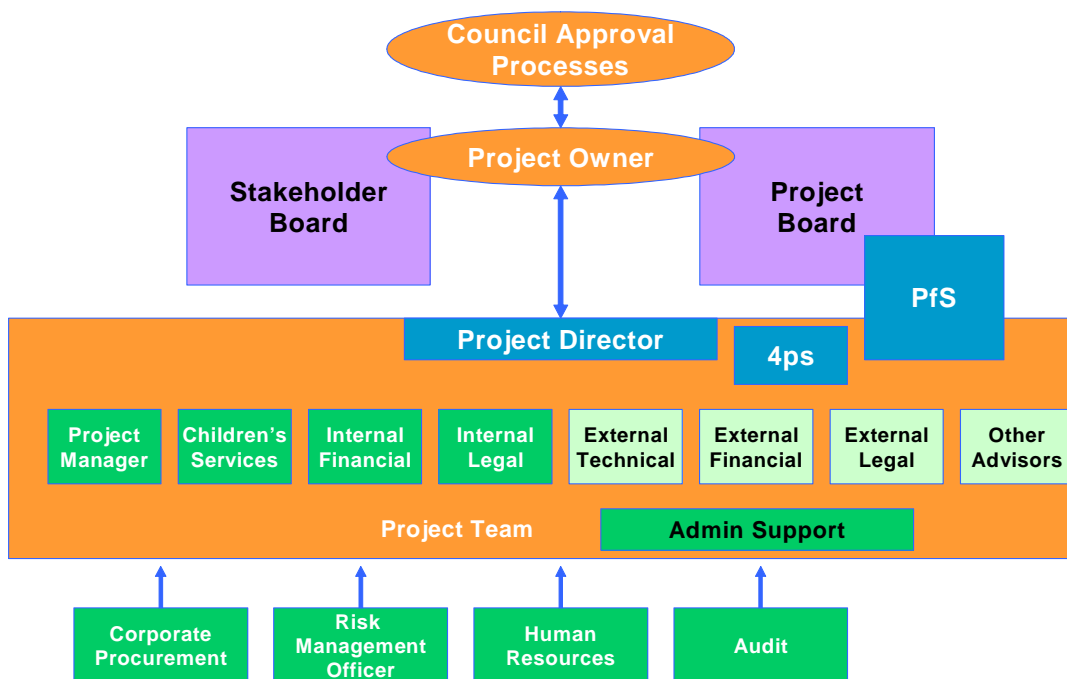
- the levels of delegated authority given to the Project Board and Project Team are appropriate and sufficient to enable effective and timely delivery of the BSF project; and that
- the Project Board and Project Team are appropriately resourced to deliver the local authority's objectives.

Local authorities should identify a Project Sponsor/Owner, who:

- is a key senior leader or manager within the local authority (such as the Director of Children's Services or the Chief Executive), with ultimate responsibility for the successful delivery of the project;

- has the authority to put in place any corporate actions needed to secure the success of the project;
- can effectively act as a broker for cross-directorate support; and
- will support the Project Director and be responsible for promoting the project with elected members, stakeholders and other external bodies.

The PID should clearly articulate the corporate ownership of the project, and set out the project's organisational structure, including the Project Board and Project Team arrangements. Local authorities should seek advice and support from their PfS Project Director to ensure that their project management and governance arrangements are appropriate.



## **Project management**

### **The Project Board**

The PID should set out the membership of the Project Board and each individual's role within the programme. The Board's Terms of Reference should be appended to the PID and formally approved by the local authority. These terms of reference should give the Board appropriate levels of delegation.

The Board should be established by the time the local authority has its Remit meeting. Its responsibilities should include:

- setting out the key objectives of the project;
- ratifying the Project Team's decisions at key stages;
- managing the interface with members and making recommendations to Cabinet on key decisions, including the latter's approval of the SfC (Parts 1 and 2), Outline Business Case and Final Business Case;
- monitoring key risks and actions to mitigate them as part of an overall risk management strategy;
- addressing the key interfaces, as set out in the PID document;
- approving the procurement arrangements, including signing off all contractual documentation before its submission to PfS for formal approval; and
- selecting the shortlist and choosing the Selected Bidder.

The suggested *minimum* membership of the Project Board is as follows:

- Chief Executive;
- Director of Children's Services;
- Project Sponsor/Owner (if not one of the other individuals listed);
- BSF Project Director;
- BSF Project Manager;
- Director of Finance or equivalent;
- Director of Legal/Corporate affairs;
- PfS Project Director;
- representative/s from Schools and Stakeholders;
- Lead member for Children's Services;
- Lead member for Regeneration;
- Design Champion (if not one of the above);
- 4ps representative (if applicable)

Local authorities may wish to include other interested parties as members of the Project Board, such as Diocesan and LSC representatives, as considered appropriate.

## Project Team

The PID must clearly set out the structure and composition of the local authority's BSF Project Team. The Project Team should include, as a minimum, staff from children's services, and internal technical, financial, procurement and legal officers. Additional appointments, including appropriate external advisers, should be made to complement the skills and experience of the in-house staff. The local authority should review its Project Team membership at appropriate times to ensure that it continues to meet its needs.

The role of the Project Team is to support the Project Director to develop and deliver the local BSF programme, including producing the SfC; Outline and Final Business Cases; the procurement of the private sector partner; and ultimately the establishment of the LEP. Terms of reference for the Project Team should be appended to the PID and formally approved by the Project Board.

For the stages up to and including Outline Business Case, the Project Team is likely to include:

- Project Director and Project Manager
- Education and ICT Advisers
- Project Officer/Assistants
- External legal, technical, financial and design advisers
- Commercial Manager
- Workstream Managers for the following areas:
  - Education visioning
  - ICT
  - Design/technical issues
  - Financial issues
  - Legal issues
- Schools representation
- Administrative support
- Communications officer

Each member of the Project Team should have a job description clearly setting out their key roles and responsibilities. The job descriptions for full time staff, e.g. the Project Director and Project Manager, should be appended to the PID (see example job descriptions in appendices to this guidance).

**Project Director:** the Project Board should delegate day-to-day operational management of the project to the Project Director, who will also be responsible for monitoring the Risk Management Plan and alerting the Project Sponsor/Owner and Board to any areas of concern. The Project Director post must be full time and should run until at least Financial Close.

**Project Manager:** the Project Manager provides key support to the Project Director, manages the Project Team and is responsible for maintaining the project plan and monitoring progress against its key milestones. The project manager post must also be full time and should run until at least Financial Close.

**Workstream Managers:** the membership of the Project Team should reflect the key workstreams, which should in turn reflect the key priorities identified in the local authority's Remit and SfC.

The PID must explain how the managers for each workstream will achieve their objectives against the key milestones for each workstream. The workstreams should interface coherently with the overarching project plan, showing relevant links/overlaps across the whole programme. Workstream plans should be available as separate standalone documents, but be included in the overarching programme plan, and the local authority should put in place effective monitoring for each. The table below shows suggested workstreams for a BSF Project:

<b>Workstream</b>	<b>To include</b>
Education Strategy	<ul style="list-style-type: none"> <li>• Pupil Place Planning and school organisation, including any relocation/co-location of schools</li> <li>• Education/Children’s Services strategies</li> <li>• Change Management and KPIs</li> <li>• Links with Academies, Diocesan and other Trust/Foundation bodies, and Further Education establishments</li> <li>• Ensuring diversity in the school estate</li> <li>• Managing external advisers, where appropriate</li> </ul>
Technical (Estates) Planning	<ul style="list-style-type: none"> <li>• Planning and surveying (including land surveys, asbestos, ground conditions)</li> <li>• Asset Management Planning</li> <li>• Space planning and school design</li> <li>• Links with Academies and Further Education provision, including the LSC</li> <li>• Options appraisal methodology</li> <li>• Managing external advisers</li> </ul>
Financial Planning	<ul style="list-style-type: none"> <li>• Cost modelling and revenue projections</li> <li>• Affordability analysis</li> <li>• Joined-up funding/links with other funding streams</li> <li>• Confirming value for money</li> <li>• Managing external advisers</li> </ul>
ICT Planning	<ul style="list-style-type: none"> <li>• ICT strategy, including the management of information</li> <li>• Infrastructure proposals – software and hardware</li> <li>• Development of ICT managed service and learning platform vision</li> <li>• Managing external advisers</li> </ul>
Legal	<ul style="list-style-type: none"> <li>• Property issues including establishing land title</li> <li>• Local Education Partnership contractual issues</li> <li>• General procurement issues, including providing cabinet reports.</li> <li>• Managing external advisers</li> <li>• Insurance</li> </ul>
Human Resources	<ul style="list-style-type: none"> <li>• TUPE issues</li> <li>• Recruitment and retention</li> <li>• Pensions</li> </ul>
Communications	<ul style="list-style-type: none"> <li>• Stakeholder engagement (including schools) and ensuring the ‘student voice’ is represented in the project</li> <li>• Media relations</li> </ul>
Community Use	<ul style="list-style-type: none"> <li>• Extended Schools including out-of hours child care</li> <li>• Sport and PE, Arts, and Libraries, etc.</li> </ul>

Workstream	To include
	<ul style="list-style-type: none"> <li>• Integrated Children’s Services, including exploring potential opportunities for links with Health projects/other agencies/voluntary organisations, etc.</li> </ul>
Design	<ul style="list-style-type: none"> <li>• Sustainability</li> <li>• Design integration and designing-in transformation</li> <li>• Managing the Design Quality Indicator process</li> <li>• Liaising with CABE</li> <li>• Managing external advisers</li> </ul>
Regeneration/ Corporate developments	<ul style="list-style-type: none"> <li>• Links to corporate developments, housing and regeneration schemes, etc.</li> <li>• Ensuring BSF compliments delivery of wider Council objectives</li> </ul>
Sports and Leisure	<ul style="list-style-type: none"> <li>• Liaising with County Sports Partnerships, Sport England, Youth Sports Trust and other sports stakeholders</li> </ul>

### Project Directory

A Project Directory should be included in the PID, giving details of all key members of the project including the Project Board, Project Team and Stakeholder Groups.

### External support

A Project Director from PfS and a 4ps consultant will be allocated to each local authority. The DCSF also allocates a Project Adviser to each local authority, whose key role is to give advice and guidance on DCSF policy, monitor progress on the project, escalate difficult issues within the Department, facilitate the delivery of ‘joined-up’ initiatives within central government, and manage the various project approval processes for the Department and Government Ministers. Local authorities should also procure external advisory support to supplement its internal capacity in specialist areas. These are likely to include (but not exclusively) financial, legal, technical (i.e. quantity surveying and other technical disciplines), design, education and ICT.

### Stakeholder and Service User Groups

The PID should clearly define the local authority’s arrangements for engaging with stakeholders, ensuring that existing local consultation mechanisms are fully exploited and new processes put in place where these are deemed insufficient to ensure stakeholders are appropriately consulted and represented within the project. A list of possible stakeholders is included in the Communications section below.

Local authorities should consider:

- establishing a specific stakeholder group for the BSF project;
- how stakeholders will be involved in the development of individual school projects;
- how to involve children and young people in the BSF project, both at the overall project and individual school levels; and
- how the PE and Sport Stakeholder Group will be engaged as stakeholders and integral partners (further information is available from Sport England at [www.sportengland.org.uk](http://www.sportengland.org.uk)).

Local authorities should also ensure that consultation on school organisation issues is planned and managed effectively, taking into account the role of organisations such as the local Learning and Skills Council and Diocesan bodies, ensuring that these bodies are fully engaged (in addition to teachers and governing bodies) where appropriate.

### **Project Management Budget**

As part of their Readiness to Deliver submission, local authorities must commit to secure adequate resources for the delivery of the BSF project.

This is distinct from the budget and funding arrangements for the overall BSF project, and covers:

- staffing costs
- internal recharging for specific advisory support, e.g. legal support to the Project Team
- external advisory support
- communications
- accommodation
- printing
- IT requirements, e.g. a suitable document management system
- travelling expenses, etc.

The budget should be set out in the PID, together evidence of the approvals and authority to spend. The PID must show who is responsible for the management of these resources at a day to day level (usually the Project Director), and identify these responsibilities in the appropriate job descriptions.

Given the level of resources required, the Project Board should, as part of its formal approval of the PID, be fully satisfied with the project management budget, and the arrangements for its management and monitoring. The Project Director's regular report to the Project Board should include spend against the project management budget – this should conform to the local authority's corporate arrangements for budget management and reporting.

### **Budget Profile**

The local authority should set out in the PID a clear project spending profile, phase by phase, in order to enable the project management and governance to be properly resourced and for the project to progress.

### **Project Controls**

The PID must set out the processes that will be used to control project progress and spend. This will include appropriate reporting mechanisms and should, as a minimum, include a regular monthly report by the Project Director to the Project Board. This report should be a standing agenda item and should include an analysis of current key risks from the risk register and the actions being taken to mitigate these.

In addition, local authorities should ensure that an effective process is in place for reporting at the end of each key stage in the BSF process, so that the Project Board can assess that the project has delivered the key milestones for each stage to enable it to progress to the next.

The Project Board may require further reports, but it is recommended that a full formal report be produced at the end of each of the following stages:

<b>STAGE</b>	<b>REPORT ON:</b>
Pre-engagement stage	Readiness to Deliver (for authorities in Wave 7 onwards)
Stage 1	Project Initiation Document
Stage 2	Strategy for Change Part 1
Stage 3	Strategy for Change Part 2
Stage 4	Outline Business Case
Stage 5	Final Business Case
Stage 6	Procurement Planning
Stage 7	Completion of PQQ
Stage 8	Completion of ITPD
Stage 9	Completion of ITCD
Stage 10	Appointment of Selected Bidder
Stage 11	Construction
Stage 12	Schools opening

### **Approvals**

The Terms of Reference, appended to the PID, for the Project Board and the Project Team should clearly set out the levels of delegation in place to ensure that the project progresses effectively and efficiently. The Project Board should satisfy itself that such arrangements are robust, as part of its formal approval of the PID.

The table below indicates the areas where it might be appropriate to seek Cabinet approval and those areas where the Cabinet may delegate decisions to the Project Board.

<b>WHO DECIDES</b>	<b>DECISIONS</b>
Cabinet	As part of the Readiness to Deliver submission, approval to commit resources to the project and to use the standard LEP model
Cabinet	Establishment of the Project Board and levels of delegated authority
Cabinet	Approval of Strategy for Change Parts 1 and 2, as recommended by the Project Board
Cabinet	Approval to submit the OBC to PfS/DCSF and subsequently to publish the OJEU notice, as recommended by the Project Board
Project Board	Appoint the selected partner
Project Board	Pre-qualify, longlist and shortlist bidders
Project Board	Approve the Procurement arrangements
Project Board	Commence each phase
Project Board	Appoint external advisers
Cabinet	Approval to submit the FBC to PfS/DCSF and to commit contractually, as recommended by Project Board

### **Appointment and Control of External Advisers**

The Memorandum of Understanding sets out PfS' expectations for, and the local authority's commitment to, funding and managing external advisers. The project planning process make specific reference to the appointment of external advisers and ensure these are in place at an early stage. PfS has procured national frameworks of

external advisors for local authorities engaged in the BSF programme, details of which are available on the PfS website.

### **Changes to the PID**

Local authorities should set out in the PID the process for updating it throughout the life of the project. This should state clearly how often the PID will be reviewed, especially in the procurement stage.

### **Gateway Reviews**

The PID should set out how the local authority intends to engage in the 4ps Gateway Review process, clearly identifying the stages at which specific gateway reviews will be conducted. Local authorities must undertake Gateway Reviews 1 and 3 at the appropriate stage. Gateway Review 0 is also strongly recommended and Gateway 2 should also be considered.

### **Impact assessment**

The SfC (Part 2) will set out the priorities and criteria for determining the scope of any investment in building works and overall expenditure on individual school projects, and the OBC will set out the options appraisals considered for each site. The Project Board will need to refer to these when deciding project approvals.

## **Section 9: Project Plan**

The local authority must develop a detailed project plan for the delivery of its BSF project and include it in the PID. The Project Plan should identify the key milestones and deliverables to be achieved, and should form the basis of the regular report to the Project Board.

Local authorities should make sure that the management of the project plan is identified as a key element of the Project Manager's job description and that the Project Manager has access to the appropriate training to enable them to use project management tools such as MS Project to create and manage the plan.

The Project Plan should be regularly reviewed to ensure all workstream plans remain aligned with the ultimate delivery of the programme. The evaluation of progress on the Project Plan should be a standing item on the agenda of the Project Team and the Project Board.

### **Reporting on the Project Plan**

Local authorities should agree the format of their regular progress reports against the project plan with their PfS Project Director. These reports should be shared with PfS each month.

### **Master Files**

Local authorities must determine at the outset how they will manage 'master files', to protect the data from loss and ensure confidentiality, and detail this in the PID. These master files are essential in establishing clear audit trails for Executive decisions, for example, and in securing sign off from external bodies such as District Audit.

Local authorities must consider the most appropriate systems to enable them to administer their BSF project, including effective version control and the management of document changes.

## Section 10: Communications Plan

Local authorities must develop an effective Communications Plan for the effective management of information within the council, to stakeholders, external agencies, the local media, etc. The Communications Plan must be appended to the PID and formally approved by the Project Board. A suitably qualified officer within the Project Team should be responsible for the production and management of the Plan, which should:

- set out the key milestones in the Project Plan and ensure that communication and consultation is effective and timely against these;
- set out the arrangements for communicating with all of the potential stakeholders in the BSF programme; and
- reflect the methods appropriate for each audience.

Stakeholders will include as a minimum:

<ul style="list-style-type: none"><li>• Pupils and parents</li><li>• Headteachers, school staff and governors</li><li>• Trade unions and professional associations</li><li>• Further and Higher Education Colleges and local Universities</li><li>• Local Learning and Skills Council</li><li>• Dioceses and other voluntary aided bodies</li><li>• Schools Forum and Admission Forums</li><li>• Potential Academy and Trust sponsors</li><li>• Representatives from Academies and Trust/Foundation schools</li><li>• PE and other sports stakeholder groups</li><li>• Local strategic partnerships</li></ul>	<ul style="list-style-type: none"><li>• Children's Services</li><li>• Other local authority departments e.g. Leisure, highways, property</li><li>• Local health organisations</li><li>• DDA (Disability Discrimination Act) representatives</li><li>• Regional providers of special education</li><li>• Neighbouring local authorities</li><li>• Voluntary and community groups</li><li>• Local businesses and the Chamber of Commerce</li><li>• Regeneration co-ordinators</li><li>• DCSF</li><li>• Partnerships for Schools</li><li>• The local media</li></ul>
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## Section 11: Risk Register and Issues Log

The local authority will have identified its approach to risk management as part of its Readiness to Deliver statement. Its approach should take account of existing corporate risk management processes, although these should be reviewed and adjusted accordingly (if appropriate) to take account of the scale and complexity of the BSF programme.

Risk management consists of six major activities:

- Risk Analysis
- Risk Identification
- Risk Prioritisation
- Risk Management and Mitigation Planning
- Risk Resolution
- Risk Monitoring

The local authority should ensure that it has a robust process for the early and ongoing identification of all key risks, including those associated with school improvement (such as the impact of educational blight). The PID must explain how the local authority intends to manage and mitigate these risks throughout the duration of its BSF project, and identify who is responsible for the maintenance of the risk register and action plan.

The Terms of Reference for the Project Team and Project Board should identify who is responsible for the management and mitigation of risk overall, and the Project Board should receive monthly updates on key risks. The project plan in the PID should show the process for regular risk and issues assessments.

The Risk Register itself must clearly show who owns, and who is involved in mitigating, each risk.

## **Appendices**

The PID should include the following information in its appendices:

- Project Director and Project Manager job descriptions;
- Project directory and other job descriptions where appropriate;
- Terms of reference for the Project Board and Project Team;
- a copy of the Memorandum of Understanding and the Remit
- a copy of the Readiness to Deliver submission;
- Project plan;
- Risk register;
- Communications plan; and
- Project management budget and profile

Further advice and support is available from Partnerships for Schools ([www.partnershipsforschools.org.uk](http://www.partnershipsforschools.org.uk)) and 4ps ([www.4ps.gov.uk](http://www.4ps.gov.uk)).

## Appendix 1

### Glossary

#### **4ps**

4ps is local government's project delivery specialist. 4ps works in partnership with all local authorities to secure funding and accelerate the development, procurement and implementation of PFI schemes, public private partnerships, complex projects and programmes. [www.4ps.gov.uk](http://www.4ps.gov.uk)

#### **AMP**

Asset Management Plan

#### **AP**

Alternative Provision

#### **BECTA**

British Educational Communications and Technology Agency. A UK agency that supports the DCSF in its strategic ICT developments. Their ICT self-review framework is a useful self-assessment tool for schools. [www.becta.org.uk](http://www.becta.org.uk)

#### **British Research Establishment Environmental Assessment Record (BREEAM)**

BREEAM assesses the performance of buildings in the following areas – management, energy use, health and well-being, pollution, transport, land use, materials, and water. Schools in BSF are required to meet or exceed the BREEAM 'very good' standard. [www.bre.org.uk](http://www.bre.org.uk)

#### **Building Schools for the Future (BSF)**

The Government's strategic capital investment programme that aims to transform education in England. It will see every single state secondary school rebuilt or renewed over the next 15 – 20 years, alongside unprecedented investment in ICT, creating schools truly fit for the 21<sup>st</sup> Century. Partnerships for Schools was established in 2004 to deliver and manager the national BSF programme.

#### **CLC**

City Learning Centre

#### **CPD**

Continuous Professional Development

#### **CYPP**

Children and Young People's (or Person's) Plan

#### **DCSF**

The Department for Children, Schools and Families. Formerly called the Department for Educations and Skills (DfES). [www.dcsf.gov.uk](http://www.dcsf.gov.uk)

Each local authority is allocated a BSF Project Adviser at the DCSF. The Project Adviser will work closely with their project team and provide access to policy advisors at the DCSF. The Project Adviser will also manage the various project approvals for the DCSF, including representing projects at the Project Review Group, if necessary.

#### **DDA**

Disability Discrimination Act

**ECM**

Every Child Matters [www.everychildmatters.gov.uk](http://www.everychildmatters.gov.uk)

**Exemplar Designs**

The DCSF produced a '[compendium](#)' of exemplar designs for new secondary schools, the result of a design competition held during 2003, which resulted in teams of architects being chosen to produce model schemes for primary, secondary and 'all-through' schools on different types of site.

**FAM**

Funding Allocation Model

**FBC**

Final Business Case

**FE**

Further Education

**ICT**

Information and Communication Technology

**Local Education Partnership (LEP)**

The standard delivery vehicle for a local BSF programme within a defined geographical area, consisting of a joint venture company, formed by a local authority, Building Schools for the Future Investment LLP (BSFI) and a Private Sector Partner (PSP).

**LSC**

Learning & Skills Council [www.lsc.gov.uk](http://www.lsc.gov.uk)

**Memorandum of Understanding (MoU)**

This is an agreement, signed by the Chief Executives of a local authority and of PfS, that confirms mutual obligations and the respective roles and responsibilities in delivering BSF both nationally and locally. This is signed before the local authority formally enters the BSF programme.

**National College for School Leadership (NCSL)**

A Non-Departmental Public Body of the DCSF, responsible for developing programmes to support leadership in schools; specifically contracted by DCSF to run the BSF Leadership programme for projects as they enter the BSF programme.  
[www.ncsl.org.uk](http://www.ncsl.org.uk)

**Office of Schools Commissioner (OSC)**

The Schools Commissioner is appointed by the Secretary of State for Children, Schools and Families, and has a national role to promote local choice for parents. This will involve encouraging the development of new Academies and trust schools. The Schools Commissioner works with a range of national and local organisations, including parents' organisations, local authorities and other stakeholders.

**OJEU**

Official Journal of the European Union: According to EU legislation, all contracts from the public sector which are valued above a certain threshold must be published in the Official Journal of the European Union (formerly the OJEC).

**PBC**

Procurement Business Case

**PCT**

Primary Care Trust

**PESSCL**

Physical Education School Sports and Club Links

**PID**

Project Initiation Document

**PPA**

Planning, Preparation and Assessment

**PPP**

Pupil Place Planning OR Public Private Partnership

**PRU**

Pupil Referral Unit

**PSA**

Public Service Agreement

**PUK**

Partnerships UK [www.partnershipsuk.org.uk](http://www.partnershipsuk.org.uk)

**Readiness To Deliver (RTD)**

A document submitted by local authorities prior to entry to the BSF programme which is used by PfS/DCFS to assess which Wave local authorities should be allocated to. The RTD covers (in summary form) the education strategy, the procurement strategy and the project governance.

**Remit meeting**

First formal meeting with a local authority as it begins BSF, carried out to clarify the expectations of DCFS and Ministers for the project

**SEN**

Special Educational Needs

**Strategy for Change (SfC)**

The first formal component of the BSF approvals process (after a local authority has proved its 'readiness to deliver'). It is designed to capture both the local authority's strategy for secondary education and the requirements that the strategy places upon the physical school estate.

**Wave**

All BSF local authorities are grouped in one of 15 'Waves', which are launched on approximately an annual basis. The grouping was initially based on a deprivation score (GCSE attainment and free school meal uptake), with the local authorities and schools most in need being prioritised for BSF funding. From Wave 4, local authorities have also had to demonstrate their readiness to deliver BSF. A local authority may appear in several Waves, depending on the scale and condition of their schools estate.

## Appendix 2

### Example job descriptions

1. **Director of Building Schools for the Future**
2. **Assistant Project Director/ Project Manager**
3. **BSF Project Officer**
4. **Education Adviser**

### Director of Building Schools for the Future

This is a high-profile position within the Council and the post holder will be representing the Council at national as well as local level, therefore the post holder must be able to operate within a complex political and strategic context.

The post holder will regularly deal with a range of complex and contentious matters, which will have substantial implications for the Council and/or Council and its resources. The post holder will have overall responsibility for the strategic direction of the Building Schools for the Future (BSF) programme in line with the local authority's Children and Young People's Plan (CYPP) and the *Every Child Matters* (ECM) agenda.

He/she will be an enthusiastic and effective ambassador for the local authority with a strong commitment to the successful delivery of the BSF project. His/her decisions will lead to the successful delivery of the BSF project, which directly affect the provision and services to children and young people. Such decisions will include changes to staffing levels, capital investment and working with partners in the delivery of services.

The activities of this post will be subject to constant change and realignment of priorities. The post holder will therefore deal with challenging, complex and often uncertain circumstances and will have to frequently manage conflicting priorities in order to meet corporate and project deadlines. The work will also be subject to interruption and it is necessary to be responsive, flexible and adaptable to a fast-paced, ambitious agenda. The post holder must act quickly and decisively with appropriate risk management techniques to meet the Council's aspirations for raising standards in secondary education.

The post holder will need to be able to provide constructive challenge and to deliver hard messages with tact and diplomacy. There will be some contact with members of the public during consultation meetings which may involve dealing with complex and contentious issues.

The work is, on the whole, office-based with visits to schools in accordance with the project plan and future requirements.

- The post holder will promote and safeguard the welfare of children and young people in accordance with Safeguarding Children in Education under the provisions of the Education Act 2002 section 175.
- The post holder must carry out his / her duties with full regard to the Council's Equal Opportunities policy.

- The post holder must carry out his / her duties with full regard to the Department's Health and Safety Procedures.
- The duties and responsibilities in this job description are not restrictive and the post holder may be required to undertake any other duties which may be required from time to time. Any such duties should not however substantially change the general character of the post.

**Responsible to:** Director of Children's Services

**Main purpose:**

The BSF programme is a major, Council-wide priority that seeks to transform education within the local authority by investing heavily in the secondary schools estate and ICT infrastructure. It entails a £Xm procurement programme. The Council will take the vanguard role with other partners to drive this transformational programme. In addition, the Director will guide the Council's Academy programme, which currently comprises X Academies.

**Main responsibilities:**

- Support the Director of Children's Services in managing the political interface on the BSF programme, at both Council and school level
- Direct the BSF and Academy programmes to the required national standards and ensure that the two programmes have complementary outcomes
- Ensure effective liaison with Partnerships for Schools (PfS), Department for Children, Schools and Families (DCSF) and 4ps in order to understand central government requirements and to communicate these clearly and effectively to the BSF Project Team, other council staff and key stakeholders
- Direct the development and implementation of a robust communications strategy, including Stakeholder Reference Group meetings, ensuring that all key stakeholders are consulted and engaged throughout the programme, and support the authority's Business Cases
- Direct the production of a Strategy for Change for submission to PfS and DCSF, ensuring that it will deliver education transformation and leverage in the innovative power of ICT infrastructure and tools
- Ensure that the pupil place planning and school organisation plans are robust and will address the choice, diversity and access agenda, and that consultations on any changes will be completed in line with BSF timescales
- Ensure BSF plans support the Council's CYPP and will help meet the five ECM outcomes and extended schools agenda, including the identification of additional funding streams beyond central government and Council support, ensuring co-ordination between all partners and that the disparate initiatives are combined into a coherent whole
- Ensure appropriate challenge and support to schools in developing their individual Strategies for Change
- Ensure a change management programme to support the transformation agenda, including through workforce reform
- Be responsible for the management of all resources and the identification and reduction of risk
- Evaluate and challenge performance on the BSF programme, identifying key areas of strength and weakness, and reviewing local progress towards delivery
- Be responsible for the preparation and leadership of the Gateway reviews
- Responsible for developing the programme of PFI and conventional procurement to deliver the programme and the production of a robust Outline Business Case that will provide value for money, be underpinned by a thorough review of the various estate options,

including ensuring service transformation, an innovative modernisation agenda in terms of design, and that design work will meet the programme's requirements

- Promote the authority's BSF programme with the private sector
- Direct the production of the Final Business Case for submission to PfS
- Ensure that the Local Education Partnership (LEP)/an appropriate procurement vehicle approved by PfS, is established and that procurement process is efficient and responsive to stakeholder needs
- Lead negotiations with the preferred bidder
- Work with prospective Academy sponsors to submit Expressions of Interest to the DCSF that will deliver Academies that will complement and enhance the educational offer within the authority; and during the Feasibility Phase to ensure that the interests of students always remain the sponsor's top priority and facilitate the process towards a signed Funding Agreement; and during the Implementation Phase to ensure that the interests of students always remain the sponsor's top priority and facilitate the process towards successful and timely Academy openings
- Development of the performance management arrangements for the team and for the programme as a whole.

### **Person specification**

- A degree level or equivalent qualification, and preferably Project Management Qualification/relevant postgraduate qualification
- Detailed understanding of the legislative and statutory frameworks relating to education and children's services, including knowledge of BSF, PFI, LEPS, and the role of PfS and the impact these have on school organisation and school buildings
- Significant leadership and management experience gained at a senior level, preferably within context of local government/education sector (leading a programme focused on transforming educational outcomes) and a commitment to high standards of practice
- Successful track record in managing and delivering complex projects/programmes, experience of strategic development, significant budget management of large capital and revenue resources, leading multi-disciplinary teams and delivering within budget and time constraints
- Proven track record in procurement, and management of PPP programmes within the public sector, or in a leading role within the private sector
- Ability to manage and be creative in the interpretation of change in relevant corporate policies, legislation and government advice to ensure policies and procedures meet corporate and statutory requirements and protect against litigation
- High levels of creativity both in problem solving, idea generation and seeking out and disseminating successful practice, in order to effectively deal with diverse, complex and highly sensitive situations.
- A significant level of creativity and ability for appropriate risk taking to secure the long term aims of the BSF programme

- High level of communication skills both oral and written / must be able to use these to influence and achieve results with a wide and diverse range of different audiences including central government, elected members, headteachers and children and young people and in the compilation and delivery of reports that adequately translate complex issues into concise and understandable language
- Ability to promote a culture of equality of opportunity, achievement, responsibility and personal growth, and build, lead and motivate individuals and teams to address complex and changing challenges so that imaginative, and effective solutions to delivery are developed
- Ability to establish a high level of trust and credibility, a consultative, collaborative and supportive style and able to influence and inspire people without having direct leadership and control, and to provide constructive challenge and deliver hard messages with tact and diplomacy to steer partners through decision-making process and to facilitate good outcomes
- Ability to communicate and negotiate effectively with trade union officers, officers from other councils as a representative of the Council, and third parties including schools, Diocesan boards, elected members, members of Parliament, Secretaries of State, and senior officers of external organisations such as DCSF, PfS, contractors and consultants
- Ability to establish effective communication networks with contractors, and to liaise and negotiate effectively with contractors to guarantee contracts are delivered to high standards, on time and within budget
- Experience of leading and managing staff including experience of performance management and disciplinary, grievance, capability and dignity at work.
- A commitment to continuous professional development in order to extend their own abilities and develop those of others.

## **Assistant Project Director/ Project Manager**

### **Main purpose:**

To support the Director of Building Schools for the Future (BSF) in the construction of the Business Cases and successful procurement for BSF, having regard at all times to ensuring that the BSF programme will deliver education transformation and value for money.

It is essential for the post holder to operate as an effective member of the BSF project team and to operate at all times in a way that enhances corporate working with Children's Services, schools and the corporate Council.

### **Main responsibilities:**

- To complete the Project Initiation Document to the standard required by Partnerships for Schools (PfS)
- To build and maintain a viable, accurate and up to date BSF project plan, ensuring that all relevant activities are included and effectively programmed in order to meet the timetable and national standards required by PfS, and prepare monthly progress reports for the Project Board
- Seek to integrate the BSF programme into wider Council strategies
- Build and maintain an up to date risk register, identify blockages to the success of the BSF project plan with proposals for solutions, and prepare monthly reports for the Project Board on key risks and mitigation
- Manage delivery of the communications plan, supporting the Project Director in updating this at appropriate stages within the BSF programme
- Support the Project Director in preparing for and managing meetings of the Project Team, Project Board and Stakeholder Reference Group meetings, including ensuring regular reports on the different workstreams
- Identify options for best value for the Council at every stage in the project
- Promote the BSF programme and the work of the Council generally to parents and the wider public
- Write the tender brief and arrange the tender process for the Technical Services, Financial and Legal Advisors
- Manage the work of the Project Team, including contract management of consultants and external support for the BSF programme, ensuring that all internal and external staff and other persons such as stakeholders are aware of their roles within the project plan and meet their deadlines and that all external consultants' programmes are compatible with the main project plan
- Arrange the development of the ICT education strategy into a series of flexed output specifications capable of being costed within the Outline Business Case
- Demographic projections and pupil place planning/school organisation plans for BSF, ensuring that any school organisation changes will be appropriately consulted upon in time with BSF timelines; that reviews of Special Educational Needs and the Pupil Referral Units are compatible with the main project plan; and that pupil data is agreed with PfS so as to inform the Funding Allocation Model (FAM)
- Asset management relating to secondary, including post-16 and related SEN provision
- Planning department liaison across the project
- Property liaison across the project

- Work with CABE and Design Advisers to ensure a thorough review of the various estate options, including ensuring service transformation, an innovative modernisation agenda in terms of design, and that design work will meet the programme's requirements
- Monitor the progress of design work in achieving BSF requirements, including the preparation of feasibility studies, practical aspects of the developing designs, in particular aspects of the build ability and construction logistics, checking that consultants review build ability and technical design proposals with specialist contractors, suppliers and schools as appropriate, and with the consultants, ensure development and appraisal of phasing options and transitional arrangements during demolition and construction so as to ensure that schools can continue to operate through the programme are met
- Draft relevant sections of the Business Cases in the above areas and support the drafting of the relevant sections for the procurement arrangements
- Support the Project Director in promoting the authority's BSF programme with the private sector, including organising Bidders' Day(s)
- Manage the Council's responsibilities in respect of the existing and future Academies programme, representing the Council on external working groups and other forums where required, including Academy Project Team meetings
- Promote the Council's policies at all times in respect of health and safety, equal opportunities and customer care

#### **Person specification**

- Good Honours degree or equivalent, and preferably a Project Management Qualification

Proven ability in:

- influencing and gaining commitment from people whilst retaining goodwill and motivation of team
- establishing effective teamwork practices

Experience of:

- directing/managing a similarly large project
- establishing effective communication, including liaising and negotiating effectively with contractors to guarantee contracts are delivered to high standards, on time and within budget.
- A positive attitude to change and a commitment to improving own skills, knowledge and performance
- IT proficient

## **BSF Project Officer**

**Responsible to:** Project Manager

### **Main purpose:**

To support the Director of Building Schools for the Future (BSF), Project Manager and project team members in the development, monitoring and implementation of the BSF project, including the BSF Project Board, and separate Academy Project Managers and project teams

### **Main responsibilities:**

- Contribute to the development of the BSF project plan
- Provide support in maintaining and updating the project plan and workstreams
- Provide support with controlling the day to day aspects of the plan, whilst ensuring the project is properly operational (specifically that there are coherent and achievable plans, and that there are suitable mechanisms for dealing with cross-programme risks issues, decisions and assumptions)
- Assist with monitoring and reviewing progress against detailed plans for the different workstreams and budgets, liaising with the workstream leaders to track progress, alerting the Project Manager to any timescales at risk
- Provide a flexible troubleshooting resource for the project team as required
- Prepare, manage and monitor the BSF budget, providing monthly tracking reports to the Project Director, and making recommendations for major expenditure items within the budget, as required
- Set up and maintain a project calendar and diary
- Represent the Council on external working groups and other forums where required, including Academy Project Team meetings
- Set up and minute key meetings, including the BSF Project Board, Project Team and Stakeholder Reference Group meetings, following through actions as required
- Draft reports for a range of audiences, including Chief Executive, Council Committees, individual Council Members, and key stakeholders including schools, Partnerships for Schools (PfS) and the Department for Children, Schools and Families (DCSF)
- Keep BSF documents up to date and distributed, and update information on the BSF web portal at regular intervals
- Manage the information flow between key stakeholders, project team members, and Members of the Council
- Help co-ordinate conferences, consultations and other events promoting BSF
- Maintain the office in an orderly and tidy condition, ensuring Health and Safety requirements are met
- Maintain filing systems, ensuring that databases and indexes are amended accordingly
- Manage and maintain the office 'library' (including publications and overheads) keeping it up to date, ordering publications on behalf of other staff, ensuring any items on loan are returned promptly, and removing out of date publications
- Manage administrative support post/s for the BSF project
- Manage sickness and absence records for the Project team

## Education Adviser

Support the Council in developing a clear and coherent Strategy for Change, consistent with the requirements of the DCSF approval framework:

An assessment of the current situation, including:

- pupil place planning and school organisation, including sixth form provision
- standards of pupil attainment
- strength of leadership at school level
- underperformance at school level/by pupil groups
- curriculum strengths and weaknesses, and specialisms
- 14-19
- SEN, inclusion and equality issues
- extended schooling and integrated children's services
- provision of ICT
- condition and suitability of school buildings

Development and articulation of key policies relating to school improvement and raising achievement, including:

- delivery of the authority's remit
- contribution to local education and corporate/regeneration strategies, including the Children & Young People's Plan (CYPP) and achieving the five Every Child Matters (ECM) outcomes
- confirming pupil numbers and place requirements
- improving choice, diversity and access and tackling underperformance at school level
- personalised learning, including improving performance by underachieving/vulnerable groups
- ICT
- 14-19 Agenda
- SEN, inclusion and equality, including pupil behaviour and attendance
- extended schooling and integrated children's services
- key performance indicators (KPIs)
- change management, including school workforce remodelling
- design of teaching spaces with flexibility/adaptability for a changing curriculum
- integration of ICT and school design
- characteristics of inclusive schools and design of social spaces contributing to improved behaviour

Provide support on education matters relevant to procurement including:

- development of Outline Business Case and collective partnership targets
- identification of education-related evaluation criteria
- evaluating education component of bids
- participate in competitive dialogue process

Provide advice support on education matters ancillary to the above.