



Wandsworth Schools of the Future

Descriptive Document



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1. Introduction and Background

1.1 Building Schools for the Future

Building Schools for the Future (BSF) is a long-term programme of investment and change in England that will help transform education for secondary age students by providing 21st century learning environments that engage and inspire young people, their teachers and the wider community.

BSF was launched by the Department for Children Schools and Families (“DCSF”), (formerly the Department for Education and Skills) in February 2003.

Partnerships for Schools is the government agency tasked with delivering BSF.

BSF is not simply a building programme. BSF creates an important opportunity to transform the way secondary schools function, developing buildings for the 21st century with teaching and learning to match. Alongside this, Ministers expect local authorities to use BSF to deliver a step change in attainment levels by increasing school diversity and enhancing parental choice in their areas. BSF goes hand in hand with other major initiatives aimed at improving the quality of education. In order to have the optimum effect on teaching and learning (and attainment) at the beginning of the BSF programme, funding was primarily targeted at areas with the lowest attainment (at GCSE level) and highest levels of deprivation (measured by eligibility for free school meals). Local authorities must also be able to demonstrate that they are ready to establish a long-term strategy based upon BSF.

An integral component, which links buildings with teaching and learning is Information and Communications Technology (ICT). BSF aims to provide:

- a step change in the level of ICT provision in secondary schools in England;
- buildings designed to maximise the use of ICT;
- managed ICT services which guarantee availability;
- incentives to develop the use of ICT in teaching and learning.

In addition, secondary schools provide a major resource for local communities, and as such, the new and refurbished facilities delivered by BSF are being designed for shared community use wherever appropriate. In line with the “Every Child Matters” agenda, every BSF school will be an extended school, offering additional or

dual use facilities, such as sport halls, libraries, nurseries and ICT resources. BSF offers a great opportunity to integrate schools into wider regeneration projects, repositioning our schools at the heart of communities.

All of this requires learning environments in which ambitious education outcomes can be delivered, inspiring teachers to innovate and young people to engage. BSF schools - whether rebuilt or refurbished - must be designed not only for the needs of this decade and the next, but with sustainability, flexibility and adaptability in mind too. In light of this, good quality, thoughtful design is key to the success of the programme. The Government wants to put in place robust arrangements to make sure that new and refurbished buildings are well-maintained so that the benefits of the investment do not diminish.

BSF will ultimately reach every part of the English maintained secondary school system, including:

- 11-18 and upper schools;
- middle schools deemed secondary, and secondary and all-age special schools;
- all categories of secondary schools – community, voluntary controlled, voluntary aided, foundation, Trust and Academies.

Local authority funding for BSF is managed through a series of waves, the first of which was launched in 2004.

Primary schools are not included in the BSF programme, but the Primary Capital programme will provide funding through the DCSF over a 15 year period to rebuild or refurbish half the primary school estate nationally.

To maximise both the impact of BSF investment and the value for money achieved, large sums of money are allocated to local authorities within each wave. Wandsworth has been given sufficient funding to address all the secondary schools within their estate and is therefore a single wave authority.

The challenges of this approach include:

- securing consistently high quality of design and finished buildings;
- integrating ICT for both curriculum and management, within and between schools;
- ensuring value for money;
- ensuring that the local construction market and the suppliers of services can respond to the volume of work;

- providing the opportunity to integrate school developments into wider social and community regeneration projects;
- partnership working with all types of schools, partners and stakeholders;
- strategic management of the investment over several years;
- delivering a wide-ranging change management programme to ensure school staff are prepared and committed to implementing new ways of teaching, with standards continuing to rise during the building programme.

Given the complexity, some aspects of the BSF process require special project management approaches. Wandsworth is seeking to put in place arrangements to make the most of this unprecedented capital investment to deliver education transformation. Every project will need:

- a project board to steer the project through its different stages;
- a project team with sufficient expertise and resources to navigate the various project stages without delays. This team should include staff with education experience and will need some specialist external advisers (e.g. financial, ICT, legal and technical);
- a means of ensuring that stakeholders – especially schools, faith bodies (such as Dioceses), trustees and the local Learning and Skills Council – are fully involved through engagement and participation so that they fully “own” the project as it progresses.

Managing large-scale investment in a local area, over an extended period, requires a new approach to procurement. The ‘old’ way of putting individual school building projects out to tender is unlikely to produce value for money or secure a flow of well-designed and constructed buildings given the scale and complexity of the programme.

Wandsworth is aiming to set up a Local Education Partnership (LEP). This is a new concept developed for BSF.

A LEP is a public private partnership bringing together three organisations:

- the local authority;
- a private sector partner (PSP) (usually a consortium of private companies including the building contractor);
- Building Schools for the Future Investments LLP.

A LEP is a joint venture company, with the public and private sectors working together with common aims, sharing certain risks and rewards. The LEP model is explained in more detail in Appendix A, Part 1 Summary of the LEP Model.

1.2 Partnerships for Schools (PFS)

BSF is supported by PFS. PFS is the body which is jointly managed by DCSF and Partnerships UK (PUK) to take forward and implement BSF.

PFS, with its advisers, has developed a detailed approach that should be followed for the procurement and implementation of BSF schemes. An extensive suite of documentation exists, comprising:

- documents that will be used during the procurement process for a LEP, such as an exemplar OJEU Notice and an Invitation to Participate in Dialogue;
- standardised agreements that will be entered into in delivering a relevant project under a LEP, including those to establish the local strategic partnership and in relation to individual premises or services; and
- guidance on specific issues that will need to be addressed in BSF schemes, including the powers of the public sector bodies involved, tax and accounting issues.

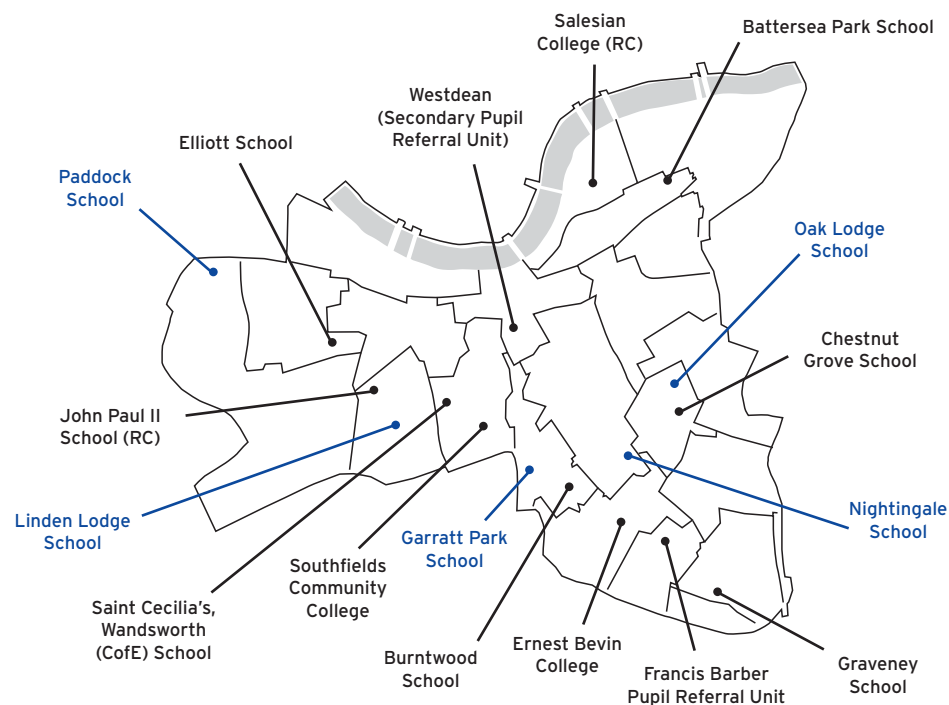
A key aspect of BSF is that local schemes, designed to deliver locally driven educational needs and requirements, are intended to be delivered by adopting a common approach, using standard documentation. Local schemes and prospective private sector partners will not be expected to amend the standard documentation other than where there are genuine project specific aspects of a scheme that require a different approach. The purpose of such standardisation is to minimise the time and cost, for both local authorities and for prospective PSPs, of procuring and establishing LEPs. This approach will then help to ensure that the core outputs, namely better facilities and services and better educational provision, will be delivered as quickly and efficiently as possible.

Partnering and Partnering Services together with the contractual structure and standard documentation is explained in more detail in Parts 2 and 3 of Appendix A.

1.3 Building Schools for the Future Investments LLP (BSFI)

BSFI is a Limited Liability Partnership jointly funded by the DCSF and PUK, in parallel with PFS. BSFI undertakes and manages the central investment in LEPs, taking a minority stake in each one established, along with the local authority and their chosen private sector partner. Once a LEP has been established, BSFI sits on the LEP to help facilitate the partnership between the public and private sectors. BSFI plays a pivotal role alongside the local authority in ensuring that the LEP establishes itself on a proper footing and that the BSF programme objectives are achieved.

1.4 Introduction to Wandsworth ("the Local Authority")



Special schools appear in blue, except Bradstow School which is located in Broadstairs, Kent.

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Wandsworth is the largest inner London borough, stretching from central London at Vauxhall out to the edge of Richmond Park in the west. It comprises 20 wards. The Borough includes a diverse range of communities. There are five town centres: Clapham Junction, Balham, Tooting, Wandsworth, Putney and smaller district centres at Earlsfield, Southfields, and Roehampton. These are focal points and help to give identity to the communities that make up the borough.

A third of the borough's land area is occupied by residential properties, many within one of the forty five conservation areas. A quarter of the borough's land is open space, much of this in the form of large areas of heath and common. The quality of much of the townscape, easy access to open space together with the proximity to central London, make Wandsworth an attractive place to live.

In 2006, the resident population was estimated to be 279,000, which represents an increase of 6.4% on 1991. Wandsworth has a mobile population with high levels of residents moving both into and within the Borough. The age structure of residents differs significantly from both the national and Greater London average. The 20-39 year age group represents 48% of the population compared to 28% nationally and 36% in Greater London. The skills structure of Wandsworth also varies from the national picture with 50% of the working age population in Wandsworth qualified to NVQ Level 4 or above. This is twice the national average. However, 13% of the working age population have no qualifications, which is the same as the national average. The 2005 ONS mid-year estimates showed that residents from ethnic minorities account for one in five of the Wandsworth population and one in three of the under 16s. Wandsworth's non-white population is therefore below the Greater London average of 30%. A large number of faiths are practised in Wandsworth.

The Greater London Authority population estimates forecast that the population of Wandsworth will increase 4% by 2016, however the projected increase is not evenly spread across the Borough. The population of Queenstown ward is estimated to increase by over 25% by 2016, with the populations of St Mary's Park and Thamesfield wards are estimated to grow by around 15%. This reflects the longer term impact of riverside residential developments. However, there are decreases in population forecast in Roehampton, Shaftesbury and Furzedown.

Wandsworth is an attractive place to live with a generally prosperous community, but parts of the Borough show significant levels of deprivation. According to a study conducted by Local Futures Wandsworth ranked 128th out of 408 local authorities in terms of deprivation and 10th in terms of prosperity but this masks substantial variations across the Borough. The most recent analysis identified that the wards of Latchmere, Queenstown, Roehampton and Tooting all exhibit significant deprivation across most, if not all dimensions of deprivation. The least deprived wards are Thamesfield, Wandsworth Common and East Putney.

The Council has developed a reputation nationally for good organisation, value for money and meaningful collaboration and consultation with all stakeholders. This has enabled the project to develop with a clear viable strategic vision and specific educational drivers for each school, which has led to the proposals for investment and change. All the Borough's schools are committed to the BSF programme and to developing a relationship with a private sector partner who will work with the schools and the Council to deliver the BSF transformation programme.

The Wandsworth LEP will benefit from the expertise of Council officers who have an in-depth knowledge of the Council, its aspirations, working practices and the needs of the various schools and stakeholders. Leadership in BSF schools amongst headteachers, their senior management team and governors will also be key to success. This will enable the Private Sector Partner (PSP) to meaningfully engage with all stakeholders and to deliver the projects in the required timescales.

1.5 Key Issues Facing the Local Authority

The key driver for developing BSF in Wandsworth is a commitment from all schools to collaborate to raise the achievements and aspirations of all young people in the Borough. The Council's objective is to provide a first class education delivered in high performing and self-evaluating schools, focused on the personalised needs of all learners. BSF investment is an opportunity for all schools to set transformational targets for attainment. Schools will review the delivery of their teaching and learning pedagogy and their curriculum, enabling every school to perform highly.

At the core of the Wandsworth BSF philosophy is a collaborative vision for outstanding achievement for all learners, who will feel safe, enjoy the time they spend at school, have high self esteem, develop life skills and progress confidently into further or higher education or employment. Furthermore, every school will become a centre of excellence in key specialisms, offering collaboration across schools for all learners, through the use of ICT and flexible, well-serviced teaching spaces. Schools will differ in specialist status, character, denominational affiliation, gender, and extended facilities but will work collaboratively to develop programmes of transformation and continuous improvement.

The Council's key BSF priorities include:

- (i) provision of sufficient secondary and post 16 places for Wandsworth pupils;
- (ii) all schools developing a clear long-term vision for the delivery of education and support to pupils and families by developing an individual School Strategy for Change (SSFC) and Change Management programmes linked to their School Improvement Plans;
- (iii) all schools setting transformational targets for achievement and reviewing teaching and learning and delivery of the curriculum to enable these targets to be achieved;
- (iv) that curricular planning in schools is developed around the concept of learning clusters and rings and independent learning as a result of the possibilities offered by ultra-mobile and furniture-integrated ICT;
- (v) the recruitment, retention, training and development of an excellent workforce;
- (vi) the Council's policy of choice and diversity being further extended by every school becoming a 'centre of excellence' in key specialisms covering the full range available;
- (vii) the performance of every pupil improving through personalised learning programmes, with access to a full range of academic and vocational pathways, enrichment activities and on-line resources, planned via collaborative timetabling and a flexible teaching day;
- (viii) all schools contributing to meet the needs of pupils with special needs and those who may be vulnerable, underachieving or have behaviour difficulties or poor attendance;
- (ix) all students valuing their environments, which will be clean, modern and business-like, and will themselves feel valued, thereby promoting improved behaviour and attendance;
- (x) schools becoming resources for their local communities ;and,
- (xi) enabling all schools and 14-19 partners to access a common Managed Learning Environment, through the London Grid for Learning, with at least 100mb broadband connectivity; with a Borough-wide ICT service combining the expertise and innovation of an ICT partner with the knowledge and understanding of the best local provision that allows the transformational power of ICT to be harnessed.

1.6 BSF in Wandsworth. Strategy for Change

The Local Authority has prepared a Strategy for Change (SfC) that describes the corporate and educational vision across the authority, together with a strategy for delivery. The SfC is a strategic planning document and is subject to revision, in accordance with the Strategic Partnering Agreement.

The SfC has two parts:

Part 1 is the Key Challenge and Objectives Section of the SfC. This describes the scope of the Local Authority's BSF Transformation Plan. It is the "what is to be done" component. It comprises:

- a map/table/chart showing each school in the Local Authority in the relevant wave of BSF investment and stating the current position of school now and what type of school it is likely to be after BSF investment – except where this will be determined by competition;
- a strategic overview of the education strategy for schools and further education;
- proposals for the school and further education estate.

The Local Authority's SfC Part 1 received approval on 15th January 2008.

Part 2 is the Detail and Delivery Section of the SfC. It adds contextual, qualitative and quantitative information to Part 1, and shows how the Local Authority intends to achieve its objectives. It is the 'how it will be done' component. It requires the Local Authority:

- to develop in greater detail how local challenges and objectives will be met using the information already given in the Strategic Overview of the education strategy section from Part 1 of the SfC; and
- to identify how BSF investment will be used to address the estate priorities already identified in Part 1 of the SfC.

The Local Authority's SfC Part 2 received approval on 19th February 2009.

This Descriptive Document must be read in conjunction with the SfC.

Part 1 and Part 2 of the Local Authority's Strategy for Change can be obtained from www.wandsworth.gov.uk/bsf

1.7 BSF in Wandsworth. Outline Business Case

The Local Authority has prepared an Outline Business Case (OBC) to secure Wave 5 Funding from the DCSF to enable the Local Authority to proceed to publish its OJEU Notice and commence its procurement.

The OBC:

- identifies whether there has been any changes to the Local Authority's corporate, educational or estate strategy since the approval of the SfC;
- summarises the scope of the whole BSF project together with details of the two Sample Schools which will be procured through the competitive dialogue process;
- contains a detailed affordability and value for money analysis;
- summarises the Local Authority's organisational structure established to deliver the BSF project;
- by reference to the SfC, summarises the Local Authority's approach to delivering transformation attainment;
- the Local Authority's OBC received approval on 24th July 2009.

2. The Proposal

2.1 Purpose of the BSF Procurement in Wandsworth

Wandsworth has set out its educational vision for Wandsworth in its SfC (see paragraph 1.6 above), which also sets out the strategic context for that vision. It now seeks to select a PSP who will work with the Local Authority and other local stakeholders to develop and deliver the strategic investment programme necessary to make a reality of that vision.

2.2 The LEP Model

Strategic investment will be achieved by forming a local joint venture called a LEP. This will be a strategic partnership focused around the delivery of the Local Authority's phased, long-term local investment programme. The LEP will be a company limited by shares. It will have a majority shareholding from the PSP. The Local Authority will take a minority stake, representing the local programme interest. BSFI will also co-invest as a minority investor along with the Local Authority.

The LEP will:

- work with the Local Authority and other local stakeholders to refine and develop its strategic investment plans for secondary education for the area;
- act as the single point of contact for the procurement and delivery of all the services likely to be required to deliver the investment programme ranging from design, construction, project management, maintenance to ICT services, etc and,
- integrate and manage a diverse range of supply chain sub-contractors ranging from building contractors, FM services to ICT providers.

The Local Authority will enter into a long term (10 year) strategic partnering agreement with the LEP, with an option to extend this agreement for a further 5 years. Through this it will confer on the LEP the first right ('exclusivity') to propose solutions to education projects identified in the Local Authority's strategic plan. This right will be contingent upon a variety of factors, including the LEP having attained pre-agreed performance levels in relation to completed procurements and delivered continuous improvement which will be incentivised through the prospect of future business.

3. Proposed Scope of the Local Authority BSF Project

3.1 Overall Scope

The secondary school estate in the Wandsworth programme comprises 16 schools. Renewal of these schools whether by means of rebuild, refurbishment or remodelling, constitutes the maximum possible scope of work represented by the Wandsworth BSF programme.

The rebuilding, refurbishment or remodelling of the Local Authority's secondary school estate will be delivered in a single wave as part of the National BSF programme.

As mentioned in paragraph 1.7, the Local Authority's OBC to secure Wave 5 BSF funding has been approved. This consists of 16 schools including the provision of ICT Services. It is anticipated that these schools and ICT Services will be delivered in the following phases with the option for the schools to commission interim ICT services:

- Phase 1 comprising the two Sample Schools (Burntwood School and Southfields Community College), is intended to represent the type of projects that the LEP is likely to be required to deliver during the term of the Strategic Partnering Agreement. Bidders proposals for the Sample Schools will form a significant part of the bid evaluation process under the competitive dialogue;
- Phase 2 will comprise the new Catholic Saint John Bosco, Elliott School, Linden Lodge School and Paddock School. The Authority would like the preferred bidder to undertake design work on Saint John Bosco and Elliott from preferred bidder stage. Linden Lodge and Paddock are predominantly ICT with investment related to access for disabilities at Linden Lodge. Because of their priority, both projects have been advanced further than would normally be expected at OBC stage for non-sample schools. The new Saint John Bosco Catholic School obtained Outline Planning Consent on 25th June 2009;
- Elliott School has a feasibility study to Stage B plus, with room layouts, concrete surveys and the in-principle agreement of English Heritage to the proposals. The Council has been working in partnership with English Heritage to develop the proposals;
- Phase 3 will comprise Chestnut Grove, Battersea Park and Oak Lodge Schools;

- Phase 4 will comprise Graveney School and Ernest Bevin College;
- Phase 5 will comprise Saint Cecilia's Wandsworth and Francis Barber PRU (two sites);
- Phase 6 will comprise Bradstow in Broadstairs Kent, Nightingale, Garratt Park, Paddock and Linden Lodge Schools.

3.2 The Sample Schools

The Sample School projects have been selected both in terms of educational needs and also on their ability to be representative of the whole estate in terms of the scope of the new build and remodelled areas, and include ICT solutions and extended services. Both projects will add school places.

Southfields Community College has additional post 16 places and Burntwood School for Girls additional 11 to 16 places. Both schools have reorganised their staffing structures, so that they are ready to deliver and work with the bidders to develop their proposals through the competitive dialogue process and beyond.

Burntwood School

Burntwood is a large, successful, inner city, comprehensive school and as the Local Authority's only single sex girl's school, it provides education for over a third of Wandsworth's young women aged 11-19. As such it is ideally placed to assist in meeting the areas of the Authority's plan and Children and Young People's Plan (CYPP) that address issues specifically regarding young women in a multi-ethnic area. These are reflected in Health and Well Being KPIs in the CYPP (for example teenage sexual health, pregnancy issues and issues regarding cultural preference for single sex education). The School's Mission statement is "the best education today for the women of tomorrow".

The school works closely with other secondary schools in the Authority to meet the needs of 1700+ students who make up a rich cultural, faith and ethnic mix reflecting the multi cultural/multi faith make up of Wandsworth. The Sixth Form caters for the needs of over 350 young people aged 16-19, of whom about 40 are boys. The school specialises in high-end 'A' level qualifications delivering excellent Value Added results. 44% of students come from homes where English is not their first language. 17% of students receive a free school meal and 70% of the Sixth Form qualify for the Education Maintenance Allowance (EMA) indicating a home income below £25K.

The proposal will provide for 1565 "11-16" places and 400 16+ places. The school's aspiration is for a personalised offer delivering the necessary skills and qualifications for young women in the future.

Southfields Community College

Southfields Community College is currently a 1300 student, 11-19 Foundation School with a non-selective intake. Many of the students come from home circumstances that, in economic terms, can be described as disadvantaged; 70% are from ethnic minorities, 60% have special educational needs and 50% have English as an additional language. Teaching and Learning is a strength of the school and that the progress made by the students between Key Stage 2 and 4 is exceptional.

The College is an inclusive community school with very low exclusions and many strategies in place to support this agenda. Southfields is an achievement-focused college. It has, over time, enhanced the students' self-esteem through investment in learning and teaching, pastoral support, curriculum change and the learning environment.

It has developed an ethos of self belief where students feel safe, want to come to the institution, enjoy the time they spend at the college and are presented with opportunities, experiences and choice.

Their aspiration is to extend these opportunities to all learners within the school and wider community and to develop the provision so that even those 'hardest to reach' can succeed and have improved life chances. The College wants to continually raise attainment, achievements and aspirations for their students and the local community.

The proposal for the College will provide for 1200 11-16 places and 425 16+ places (an increase of 150 places on the number of 275 places contained within the Sfc2 submission). The increase has been ratified by the LSC. Statutory Approval has also been obtained for the establishment of a 25 place Resource Base for pupils with speech, language and social communication needs. The College also hosts a Hearing Impaired Unit and the Authority's Exclusion Unit. The particular needs of these activities have been reflected in the control option.

The College's proposal for a new full size all weather pitch, funded outside of BSF, has now been approved and planning permission obtained, with works due to commence shortly.

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3.3 Approaches to ICT

The Council will require an ICT service that combines the expertise and innovation of an ICT industry partner with the knowledge and understanding of our best local provision to deliver an outstanding service

The Council's vision for ICT has been developed collaboratively with schools and other stakeholders to capture the diverse and collective ambitions for education in Wandsworth. Schools are committed to working together to ensure that they get a service that meets their needs, and adds extra value to the developments they have already undertaken.

The ICT Project within the BSF programme involves 16 schools, nine mainstream secondary schools, six Special Schools and the secondary Pupil Referral Unit. The full ICT service will be made available to schools in line with the phasing of the building projects as below. It is proposed to offer the LEP an initial 7 year contract for ICT Managed Services starting from the completion of the first Sample school (Year 1). The Council is also proposing to provide full service to two special schools, Paddock and Linden Lodge early in the programme. The Council would expect that Interim Services be available to all schools prior to their integration into the full service.

	Jan/Dec 2012	Jan/Dec 2013	Jan/Dec 2014	Jan/Dec 2015	Jan/Dec 2016	Jan/Dec 2017	Jan/Dec 2018	Jan/Dec 2019
Sample Schools					Burntwood, Southfields Community College			
Phase 2					Saint John Bosco, Elliott, Linden Lodge, Paddock			
Phase 3					Chestnut Grove, Battersea Park, Oak Lodge			
Phase 4					Ernest Bevin, St Cecilia's, Frances Barber, Garratt Park			
Phase 5					Graveney, Nightingale, Bradstow			
Full Service								
Interim Service								

The Council has worked with its schools and other stakeholders to develop a vision for the future that has technology integrated and embedded within it, to maximise the transformational impact.

Personalisation of Curriculum and Learning

Every student experiences success, is engaged and excited by learning, has high aspirations, feels supported in making progress and knows they are valued. ICT Provision should be seen as an agent for change, enabling teaching staff and pupils to transform the way they work and learn. ICT solutions should encourage new methods

of teaching and learning. This will increase the links between children's experience of school and of the technologically rich world outside. By listening to the pupil 'e' voice we will ensure young people contribute to our adoption and development of a wide range of technologies.

Inclusion and Special Educational Needs

ICT should support the inclusion of learners whatever their needs, including those with Special Educational Needs and the Gifted and Talented.

14-19 Continuity

ICT should enable 14-19 learners to easily access a wide range of subjects and qualifications, utilising multi-site and virtual models of study. It will use ICT to track pupils' progress and to ensure that each child is known and effectively supported.

Wider Children's Services Agenda

ICT should support the aims of the various agencies and organisations working to realise the Every Child Matters agenda.

Management and Administration

ICT should provide efficiencies (financial and time) and enhanced effectiveness for those engaged in the management and administration of schools. The integration of our learning and management systems within a Managed Learning Environment, will bring together all the information on pupils' progress with an impressive range of learning resources, software and communication tools.

Continuing Professional Development and Change Management

ICT should be a fully considered element of the professional development of staff and the management of change in Wandsworth schools. A collaborative group (comprising representatives from schools, the ICT partner and the Authority) will exist to plan and monitor the implementation of the change management and CPD programme. This will include new 'blended' learning models of training, utilising technology to offer training and support at a distance as well as face to face.

Community Access and Use of ICT Resources

Schools' ICT facilities and services should benefit the local communities in the borough of Wandsworth. Schools will develop as the hub of the community that they serve, offering a range of extended services,

adult learning, performance facilities, library facilities, sports provision and links with higher education and business, with shared space for external agencies to use.

Implications for Design of Physical Environments for Learning

ICT should be optimally integrated with the proposed built environment. Learning spaces should be complemented with ICT facilities that are flexible, modern, well organised and capable of being regularly refreshed. Via new school design, mobile technologies and adaptable organisation, the traditional notion of the classroom will develop to incorporate a much wider range of physical and virtual environments. Students will work off site for some courses and a blend of human, physical and virtual inputs to a learner's programme of study will become a reality.

The current ICT context

The Council currently has a mixed ICT service across its schools. Most schools have their own in-house ICT support service and some supplement this service with external support from the Authority or commercial partners for specific technologies. BSF will enable the provision of a single, high quality ICT service that will allow all learners to benefit from the transformational potential of ICT regardless of the institution they attend. An ICT Managed Service will ensure greater reliability and consequently increase user confidence and engagement, supporting improved learning, teaching, management and administration.

All schools are working with the Becta Self-Review Framework (SRF) as a key tool to focus on their delivery of Harnessing Technology outcomes. The evidence collected for the Becta SRF is directly mapped to the SEF and also provides evidence on how ICT is supporting Every Child Matters for each school. The sharing of this work with BSF bidders and the eventual ICT partner will provide early-shared understanding of the current position and future aims of the schools. The SRF will provide the baseline against which schools will plan for the strategic development of ICT.

The Council will adopt the PfS standard model of an area-wide, ICT managed service contract through the LEP that will seek to build on and integrate existing provision where this offers best value and service effectiveness.

Schools have agreed in principle to an ICT Managed Service and are committed to working together to ensure that they develop a service that meets their needs and adds extra value. The service will be for all schools, but we stress the need for a service tailored to each individual school, that recognises their differing needs and aspirations. The Council believes a combination of the expertise and innovation of an ICT industry partner with the knowledge and understanding of our best local provision will deliver a world-class service that allows the transformational power of ICT to be harnessed.

Secondary heads and school leaders have had specific input on the benefits that a single ICT service will bring to their schools and their learners through their participation on the Council's' ICT Workstream. This Group has been instrumental in building consensus within the Council through active participation in workshops designed to develop the Strategy for Change and ICT Output Specification. The Group has been consulted on key new ICT developments that influence the ICT service, for example, the introduction of personal mobile technologies and the MLE. Schools have agreed to collaborate on and evaluate the MLE implementation throughout the next three years, allowing for informed professional decisions on our learning platform of the future. We would expect our ICT partner to be able to work with the Council in taking this developed teaching and learning practice to the next level.

The ICT Workstream will have a key role in managing the transition from the current practice to the new managed service. Schools are already reviewing their ICT support structures, with a view to restructuring if necessary, in order to make the transition as effective and efficient as possible. As part of the ICT partner's change management delivery, operational training will be provided regarding the effective use and management of the ICT service. The Group will play a key role in supporting the Council in contract management once the service is operational, ensuring that the service that was requested is the one that is delivered and successfully meets all functional requirements.

The ICT Workstream has overseen the ICT Total Cost of Ownership activity that has informed the Council's decision to commit £150 per pupil of school revenue for the initial 7-year life of the ICT contract to fund on-going maintenance of the ICT Managed Service, elements of local choice funds, refresh and training. Discussions with the ICT market have indicated that this investment level will contribute to the transformation envisaged.

The model below is an example of the ICT Managed Service that the Council will be seeking to be provided in partnership with the schools. During the procurement process, Bidders will identify how they can provide best value for money and may propose alternative categorisation of these examples.

ICT Managed Service

On-Site

Central Procurement of Equipment/Services Based at School Sites

- Single School Local Area Network
- Wireless Network
- Local Servers & Server Software
- Staff and Student Devices
- Device Software Licenses (OS, productivity software)
- Classroom AV / Interactive Equipment
- Digital Signage
- Printers
- IP Telephones
- Common ID System (i.e. smart cards, biometric)
 - Cashless Catering
 - E-Registration
 - Library Resource Management
 - Print Release
- Integration of Legacy Equipment
- Installation
- On-Site Engineer(s)
- Break/Fix Service

Off-Site

Shared Services Managed and Located Centrally

- Central Server Farm
- Central Switches
- VOIP Telephony
- Firewall
- Backup
- User Account Management
- Active Directory
- Remote Access (24/7/365)
- File Services
- Print Services
- Common ID System Applications
- Centrally Delivered Applications
- Legacy Application Integration
- Disaster Recovery
- Helpdesk
- MIS support
- MLE support (optional)
- Network Engineers
- Network Maintenance

Change Management

Collaborative Coordination and Delivery

- Collaborative coordination, development and delivery of change management by:
 - Schools
 - Authority
 - ICT Partner
- Content Development
 - Training Materials
 - Learning Resources
- Training and CPD
 - Operational
 - Curriculum
 - Administrative
- ICT Active Research
- Trial Environments
- Pilot Testing Programmes
- Emerging Technology Updates

Local Choice

Specialist Requirements and Enhancement Options

- Specialist Equipment & Software Catalogue, e.g.
 - Subject specialist Software
 - ICT Training Content (for purchase)
 - Visualisers/ Document Cameras
- Increased quantities i.e. increased quantity of large LCD display screens to support Student Voice
- Increased specification i.e. higher-specification 17" media laptops to support specialism
- Increased service requirements i.e. on-site engineer available to cover Extended Service provision.

Retain all above levels of equipment and service on an appropriate refresh cycle.

ICT Options Appraisal

It is intended that the full scope of ICT services as set out in the ICT Output Specification will be procured through BSF. The only exceptions to the full scope are the provision of LGfL services for Broadband connectivity and the Managed Learning Environment. This is a common picture across most London Local Authorities, who have worked together since 2001, leveraging combined purchasing power in the procurement of broadband connectivity and associated services for London maintained schools.

Wide Area Broadband Connectivity is not envisaged as being procured through BSF as Standards Fund grant has already put in place a world-class, highly resilient network through LGfL that will allow schools and the Council to meet their BSF aspirations.

All secondary schools have collaboratively adopted the London MLE (Frontier through LGfL) for a period of three years from December 2007 – December 2010 and have agreed to collaborate on and evaluate the MLE implementation throughout the period, allowing for informed professional decisions on our learning platform of the future. The Council would expect the ICT partner to be able to work with the Council in taking this developed teaching and learning practice to the next level.

Estimated Costings for the Wave 5 and funding envelope for the Sample Schools

The costs of the Schools were estimated by the Local Authority using its own information and national benchmarks supplied by PFS.

Description of School	Phase	Estimated Construction Commencement Date	Estimated Capital Value (nominal terms)	Proposed procurement Route	Estimated ICT Hardware Costs (nominal terms)
Southfields	1	April 2011	£29.2m	D&B	£2.14m
Burntwood	1	April 2011	£40.9m	D&B	£2.85m
Saint John Bosco	2	June 2011	£42m (including Monastic accommodation)	D&B	£1.74m
Elliott	2	December 2011	£40.3m	D&B	£2.32m
Paddock	2	March 2012	£0.7m	D&B	£0.17m
Linden Lodge	2	March 2012	£1.3m	D&B	£0.18m
Chestnut Grove	3	February 2013	£23.8m	D&B	£1.52m
Battersea Park	3	February 2013	£28.7m	D&B	£1.52m
Oak Lodge	3	February 2013	£13.9m	D&B	£0.13m
Graveney	4	July 2013	£46.1	D&B	£3.10m
Ernest Bevin	4	November 2013	£17.4	D&B	£1.67m
Saint Cecilia's	5	May 2014	£3.9m	D&B	£1.45m
Francis Barber (two sites)	5	May 2014	£7.6m	D&B	£0.26m
Bradstow	6	March 2015	£11.7m	D&B	£0.07m
Nightingale	6	March 2015	£8.9m	D&B	£0.13m
Garratt Park	6	March 2015	£1.3m	D&B	£0.23m

¹ Including proposed ICT solution (i.e., full managed service etc).

The estimated capital value for the Burntwood D&B Sample Scheme is £40.9m in nominal terms based upon a school of 1965 pupils. This cost is based on an estimated percentage of new build in the scheme of 23%.

The estimated capital value for the Southfields D&B Sample Scheme is £29.2m in nominal terms based upon a school of 1265 pupils. This cost is based on an estimated percentage of new build in the scheme of 29%.

PfS have confirmed that £267,351,000 (at reconciliation date) will be made available for conventional funding through the FAM as capital grant. The funding allocation model has been re-calculated to funding start dates to allocate the funding to match capital costs across the phases. This produces an estimated FAM of £332,895,000 at funding start.

There is a further contribution of £9,000,000 from land sales and school contributions and proposals for seeking £675,000 carbon emissions funding for the new school making a total investment proposal of £342,571,000. The capital expenditure required for the project has been estimated at £342,210,000.

The funding envelope for ICT Investment is comprised of Capital Grant funding of £19,782,350 (£1,450 per pupil) with £150 per pupil (April 2008 prices) based on revenue funding from school contributions. The £150 figure will be indexed annually by RPIx. The Local Authority has assessed that this will provide an affordable solution.

4. Procurement Arrangements

4.1 The Project Board

A Project Board has been set up to oversee the management and delivery of the Local Authority's BSF project.

Leading Members hold meetings every fortnight and BSF issues are regularly reported as part of the consultation process to ensure that decisions are expedited throughout the Wandsworth BSF and procurement programme.

The Project Board includes the following people:

Name	Role/Organisation
Paul Robinson	Director of Children's Services
Bruce Glockling	Wandsworth Project Director
Chris Buss	Deputy Chief Executive and Director of Finance
Adrian Butler	Assistant Director Children's Services, Planning & Resources
John Johnson	Assistant Director Children's Services, Standards & Schools/ Design Champion
Gary Hipple	Head of Children's Services Admin & ICT
Graham Stapleton	Principal Graveney School
Mike Chivers	Co-Principal Ernest Bevin College
Brigette Arundell	Project Director, Partnerships for Schools
Julie Stockdale	Assistant Project Director, Partnership for Schools

The Project Team meets fortnightly to manage the delivery of the project and includes the following people:

Core Team

Name	Role
Bruce Glockling	Project Director
Steve Daniels	Project Manager
Peter Black	Project Manager
Gary Hipple	Head of Children's Services ICT/BSF lead
Sarah Cornforth	Programme and Project Manager
Saskia Andrews	Education Development and Pupil Place Planning Officer
Megan Clinton	Project Assistant

Extended Team

John Johnson	Assistant Director Children's Services/Design Champion
Gillian Bennell	Head of Special Services Planning
Rukhsana Sheik	Co-Principal Ernest Bevin College
Martin Walker	Borough Solicitor
To be advised	Financial Controller
Andy Shaw	Head of Property Audit
Trisha Jean Marie	Planning Officer
Paul Martland	Extended Schools Development Officer
Simon Ingyon	Head of Leisure & Sports Services
Mandy King	Senior Policy Analyst (Environment)

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5. Procurement Process

5.1 Procurement Stages

The procurement process will be undertaken in the following distinct phases leading to the selection of a preferred Bidder.

Prequalification – Selection Stage

Compliant submissions will be subject to the PQQ evaluation process. In undertaking the evaluation, the Local Authority will use the evaluation matrix attached at Appendix A to the PQQ. The Local Authority expects to shortlist three Bidders whom it will invite to participate in dialogue. The Local Authority will rank Bidders at the pre qualification stage and reserves the right, in the event that a Bidder withdraws or drops out after being shortlisted, to revert to the next best bidder identified at the selection stage, provided the company has met the thresholds.

Invitation To Participate in the Dialogue (IPD) – Dialogue Phase

The dialogue phase will be conducted in two stages.

Stage 1: Throughout Stage 1 of the dialogue there will be a strong emphasis and focus on Bidders' proposals to deliver the key outcomes of the BSF project in terms of partnering. At Stage 1, the design development of the two Sample Schools will provide a conceptual and strategic response to the Local Authority output specifications. Stage 1 of the dialogue will culminate in the submission of initial bids by the Bidders.

The Local Authority will evaluate the initial bids applying the evaluation award criteria published in its IPD. At this stage, the Local Authority will normally reduce the number of Bidders (to a minimum of two), who will proceed to the second stage of the dialogue.

Stage 2: Through this second stage of the dialogue the Local Authority will continue to work with the Bidders to scope, agree and document the solution(s) capable of meeting the Local Authority's overall needs and requirements and upon which final bids can be sought. In particular, this will involve finalising a detailed design solution for each of the Sample Schools.

Prior to the conclusion of the second stage of the dialogue, the Local Authority may require Bidders to submit one or more interim proposals in order to enable the Local Authority to assess Bidders progress in developing overall solutions for the project. The interim solutions may relate to partnering, educational transformation, change management, design and technical, ICT, finance and commercial and legal.

Bidders should note that the dialogue phase will continue until Wandsworth and PFS are satisfied that all material issues relating to a Bidder's solution and, in particular, those that impact on price and risk have been scoped, agreed and documented. Furthermore, the dialogue can not be concluded until PFS has approved all derogations to the BSF Standard Form Agreements.

Conclusion of Dialogue Phase, Invitation To Submit Final Bids

When the Local Authority and PFS are satisfied that the above requirements and the legislative provisions are met, the competitive dialogue can be concluded and the remaining Bidders will be notified in writing that the competitive dialogue is concluded. The Bidders will receive the Invitation to Submit Final Bids (ITSFB) and be invited to submit their final bids.

Following receipt of final bids, and after any clarification, specification or fine-tuning that may be required; the Local Authority will evaluate the final bids received and may select a Preferred Bidder.

Bidders are reminded that the Local Authority is only permitted to "clarify, specify and fine tune" final bids. This means that there will be an extremely limited opportunity to leave matters open and/or hold discussions with Bidders once final bids have been submitted.

Selection of Preferred Bidder

Following the selection of a Preferred Bidder, there may be a further request by Wandsworth for clarification of the Preferred Bidder's final bid and confirmation of commitments within it. A Preferred Bidder letter must be signed by the Preferred Bidder, the senior funders, the first tier sub-contractors and PFS.

The contract will be awarded on the basis of the most economically advantageous bid in accordance with the award criteria which will be included in the IPD.

5.2 Key Dates in the Procurement Timetable

The Project Board has developed a detailed project management plan and procurement timetable.

The procurement timetable has been agreed with members of the Project Board and was included in the OBC.

Key dates from the timetable are shown in the table below:

Pre Qualification Stage

Stage	Actual or Planned Date
Bidders Open Day	29th June 2009
OJEU Notice Published	24th July 2009
Issue of Descriptive Document and Pre-Qualification Questionnaire	24th July 2009
Return of PQQ	3rd September 2009
Shortlist confirmed	October 2009

Dialogue Phase

Issue IPD (Stage 1 of the Dialogue)	October 2009
Return of Initial Bids	December 2009
Completion of evaluation of Initial Bids and deselect one bidder	February 2010
Proceed to Stage 2 of the Dialogue [include dates for interim submissions if relevant]	February 2010
Conclusion of Dialogue Phase	May 2010
Interim Submission of Phase 2 Bids	May 2010
Clarification of Phase 2 Bids	May/June 2010
Close of Dialogue	July 2010
Issue of ITSFB	July 2010
Receipt of Final bids	August 2010
Clarification, specification and fine-tuning and evaluation of Final bids	August 2010
Appointment of Preferred Bidder	September 2011
Clarification and confirmation of commitments	September 2011
Alcatel Standstill begins	January 2011
Contract award	April 2011
Contract commencement	April 2011

Key Procurement Issues

BSF Procurement will follow the Partnerships for Schools revised procurement timeline.

Competitive dialogue will be led by the BSF Project Director, supported by the Director of Finance and the Assistant Director of Children Services ensuring quick effective decision making throughout the procurement process.

The Council's service objectives are focussed on working with a partner who can drive good value for money and good quality design and competition in the supply chain to share the rewards of the exclusivity afforded by the LEP.

The LEP will be operational initially for ten years with a further option of extension for five years. The BSF investment will include the construction programme of design and build construction on 16 sites, with a value in excess of £330million. If the LEP is successful there will also be the option for the Council to consider the inclusion of the primary capital programme and other non housing Council capital projects, including libraries, parks and open spaces, office accommodation and multi purpose sports facilities There will be hard FM and lifecycle maintenance to ensure that the Council's investment is maintained and an ICT managed service with the option of interim services and a further extension.

There will be no PFI, ensuring simplicity of delivery in terms of cost, time and funding.

Construction

Construction covers 16 sites in a single wave with more than half the investment in the first two phases. A draft construction programme is included in the OBC.

There is an experienced education, planning and technical client team that will remain after financial close to work in partnership or as part of the LEP to enable and commission new schemes.

It anticipated that design work on two of the phase two schemes (Elliott and Saint John Bosco) will be started at preferred bidder stage.

Facilities Management

The hard FM contract (funded by contributions from the schools), and lifecycle maintenance will be based on the specification and the contract set out in Appendix 25 of the OBC, for a period of 10 years after construction. Through the design solution and the selection of materials the Council will be asking the private sector partner to provide school with an extended warranty of three years. The Council is seeking an effective link between the design solution and the subsequent facilities management plans. The LEP will have an incentive through an extended period of responsibility for defects to design and build premises which are affordable easy to maintain, with the use of suitable robust materials.

The LEP will be offered full exclusivity through its life and the Council is expected to manage the lifecycle fund. Payment will be based on the delivery of services to a performance specification. The Council does not propose to pass over performance risk.

ICT

The ICT managed service will be 7 years after completion of construction of the first sample school, including technical and educational support on site and offsite, change management and local choice.

The full ICT service will be made available to schools in line with the phasing of the building projects. Refresh is included in the first seven years.

The option of a further extension for all schools, subject to satisfactory performance of the LEP

There will be an option of interim or early services for all schools after the financial close.

There will be a change management role for the ICT provider in terms of the development of ICT and its direct impact on teaching and learning.

Exclusivity

Exclusivity for the LEP for ongoing design and build work above £250,000.

Exclusivity over hard FM and lifecycle maintenance for all works related to the BSF investment.

Exclusivity for ICT above £25,000

In addition, the Council may offer the LEP the primary capital programme and other Council capital projects, should the LEP prove good value for money, with rapid delivery, efficiency savings and the successful implementation of the phase 1 BSF sample secondary schools.

Site surveys

An extensive series of surveys has been carried out for both the sample and non sample schemes as follows:

	Measured Building	Elevations	Topographical	Condition	Building Services	Drainage	Structural	Geotech & Geo-env	Transport	Acoustic	DDA	Type 2 Asbestos	FFE	Utilities	Archaeological	Arboricultural	Concrete	Flood Risk Assess.
Southfields	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Burntwood	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓		
Saint John Bosco (New School)			✓			✓		✓	✓					✓	✓	✓		✓
Elliot	✓	✓	✓	✓	✓	✓	✓	✓		✓		✓		✓		✓	✓	
Chestnut Grove	✓	✓	✓	✓	✓	✓	✓	✓						✓		✓		
Battersea Park	✓	✓	✓	✓	✓	✓	✓	✓						✓				
Ernest Bevin	✓	✓	✓	✓	✓	✓	✓	✓						✓		✓	✓	
Graveney	✓	✓	✓	✓	✓	✓	✓	✓						✓		✓		
St Cecelia's	✓	✓	✓	✓	✓	✓	✓	✓						✓				
Oak Lodge	✓	✓	✓	✓	✓	✓	✓	✓						✓		✓		
Francis Barber*	✓	✓	✓	✓	✓	✓	✓	✓						✓		✓		
Bradstow	✓	✓	✓	✓	✓	✓	✓	✓						✓	✓			
Nightingale	✓	✓	✓	✓	✓	✓	✓	✓						✓				

Shaded cells represent survey with collateral warranty

*=both sites; arboricultural survey only available at Westdean Close

The sites on which the sample schemes are to be undertaken are in the ownership of the Foundation governors. Both governing bodies have given their approval to the development of the sites based on the control options submitted in the OBC. The sites are registered and following title searches, the Council legal advisers on property matters, ASB Law, have confirmed that there are no impediments or restrictions that prevent development.

The sites on which the non sample schools are to be built are owned either by the Council or the relevant Foundation trustees. The Bradstow School site is currently unregistered, the Authority has arranged to secure voluntary first registration. All documentation will be made available to the bidders.

Communication and Consultation

The Council has consulted thoroughly during the development of its Sfc2 and OBC proposals, with the level of school engagement being held up as an exemplar by the National College of School Leadership (NCSL). Soft market testing has also revealed that engagement with schools is a very positive feature of Wandsworth's BSF project.

A communication and consultation plan has been implemented to facilitate engagement with the wide range of BSF stakeholders.

Examples of consultation include:

- Public consultation has been undertaken with pupils, parents, governors, staff and the wider community via an online questionnaire. This followed earlier an earlier consultation issued to all parents of primary and secondary age on the proposals within the Sfc2.
- Regular updates on the BSF project have featured in the Council's borough-wide magazine (BrightSide), the Children's Service magazine for primary and secondary pupils (Schools BrightSide) and the internal publication for Children's Services staff (CS Bulletin) to advertise the ongoing work on BSF and highlight the opportunities to get involved with the programme.
- Regular meetings of the ICT working group, involving representatives from all schools, to develop the ICT Strategy and Output Specification for the ICT Managed Service.
- Regular meetings with school bursars to develop the FM proposals for the school estate.
- Regular workshops with the senior leadership teams (including Chair of Governors) at both sample schools to develop the output specification and control option for their school.

- Workshops with the senior leadership teams of all schools to develop and agree their proposed curriculum model and control option for OBC submission, as described in appendix 1A.
- Briefing sessions for governors on the BSF programme and the level of commitment required at each stage. This has been supplemented by the BSF team attending Governing Body meetings when required and termly BSF updates in the Children's Services Directors Report issued to all Governors.
- Briefing sessions have been held for Council members to find out more about the BSF proposals and the potential impact on the local community.
- Briefing stage DQI sessions for the two sample schools, involving the heads, departmental heads, teachers, governors, pupils, CDA and premises staff.
- Regular Sports and PE Stakeholder meetings to discuss the development of sports facilities within the control options, opportunities for community use and applications for funding streams to add value to the BSF proposals.
- Meetings have been held with partners at the Metropolitan Police to discuss opportunities for joint working.
- Public meetings and a display of plans were held at both Sample Schools during the planning consultation stage. This gave all members of the local community the opportunity to ask questions and find out more about the proposals included in the Outline Planning Applications.
- Schools have also carried out extensive consultation with their local stakeholders.
- Regular meetings with the Archdiocese of Southwark and the Salesians of Don Bosco as part of a well established steering group developing strategic proposals for Saint John Bosco School. This group is supported by a client working group to develop the detail behind the proposals, this group includes archdiocese and Salesian representatives, stakeholders from the current catholic secondary schools and headteachers of local catholic primary schools.

As part of the continual process of change management and encouraging schools to think creatively about BSF transformation, schools will be holding a BSF Professional Day in November 2009 and a BSF Pupil conference in early December 2009.

6. Enquiries and Further Information

All queries must be submitted in writing via e-mail to: bsfpqq@wandsworth.gov.uk

Bidders should outline their request in a request for information that is available from download from: www.wandsworth.gov.uk/bsf

Save where the response by the Local Authority to a query relates to commercially confidential matters, the Local Authority will copy their responses to all Bidders.

7. Right to Reject and/or Disqualify

The Local Authority reserve the right to reject or disqualify a Bidder, and/or its supply chain members where:

- the PQQ is submitted late, is completed incorrectly, is incomplete or fails to meet the Local Authority's submission requirements which have been notified to Bidders;
- the Bidder and/or its supply chain members is/are unable to satisfy the terms of Article 45 of Directive 2004/18/EC and/or Regulation 23 of The Public Contracts Regulations 2006 at any stage during the selection and evaluation process (see Form 1 attached to the PQQ);
- the Bidder and/or its supply chain members is/are guilty of serious misrepresentation in relation to its application and/or the process;
- there is a change in identity, control, financial standing or other factor impacting on the selection and/or evaluation process affecting the Bidder and/or its supply chain members; and/or
- there is a conflict of interest arising between the Local Authority and the Bidder and/or its supply chain member/s.

8. Right to Cancel, Clarify or Vary the Process

8.1 The Local Authority reserves the right to:

- cancel the selection and evaluation process at any stage;
- require a Bidder and/or its supply chain members to clarify its/their submission in writing and/or provide additional information. (Failure to respond adequately may result in a Bidder not qualifying); and/or
- amend the terms and conditions of the tender process.

9. Costs and Expenses

9.1 All Bidders are solely responsible for their costs and expenses incurred in connection with the preparation and submission of the PQQ and all future stages of the selection and evaluation process. Under no circumstances will the Local Authority, DCSF, PFS, PUK, BSFI or any of their advisers, be liable for any costs or expenses borne by the Bidder or any of its supply chain members or advisers in this process.

10. The Descriptive Document and PQQ

10.1 This Descriptive Document and the PQQ have been prepared by the Local Authority for the purpose of providing an application procedure for individuals or organisations interested in tendering for the Local Authority BSF project and to assist the Bidders in making their own evaluation of the potential opportunity to enter into a contractual relationship for the provision of such services.

10.2 This Descriptive Document does not purport to be all inclusive or to contain all of the information that a Bidder, supply chain member or funder may require.

10.3 This Descriptive Document shall not be considered as an investment recommendation made by the Local Authority, DCSF, PFS, PUK, BSFI and/or their advisers to a Bidder, supply chain member or funder.

10.4 Any persons considering making a decision to enter into contractual relationships with the Local Authority following receipt of this Descriptive Document should make their own investigations and their own independent assessment of the Local Authority and its requirements for services associated with the project and should seek their own professional financial and legal advice.

10.5 None of DCSF, PFS, PUK, BSFI, the Local Authority, their advisers, or the directors, officers, members, partners, employees, other staff, agents or advisers of any such body or person:

- makes any representation or warranty (express or implied) as to the accuracy, reasonableness or completeness of this Descriptive Document;
- accepts any responsibility for the information contained in this Descriptive Document or for its fairness, accuracy or completeness; and/or
- shall be liable for any loss or damage (other than in respect of fraudulent misrepresentation) arising as a result of reliance on such information or any subsequent communication.

10.6 Only the express terms of any written contract relating to the subject matter of this Descriptive Document as and when it is executed shall have any contractual effect in connection with the matters to which it relates. Any such contract will be governed by English law.

10.7 Nothing in this Descriptive Document or other contract documents is, or should be, relied upon as a promise or a representation as to the DCSF, PFS, BSFI, PUK or the Local Authority's ultimate decisions in relation to the Building Schools for the Future programme which will depend at least in part on the outcome of negotiations with a Bidder, supply chain member or funder.

10.8 The PQQ Evaluation Matrix includes minimum thresholds, covering the following areas:

- financial experience and economic standing (Questions 2.1 and 2.2)
- commercial matters (Questions 3.2 and 3.3)
- quality, Health and Safety, Environmental Protection, Employees, Equality in the Workplace (Question 4.3)
- partnering experience (Questions 5.1 and 7.1 to 7.4)
- design, development and operations (Questions 6.1 and 6.6).

Full details are set out in the PQQ and the PQQ Evaluation Matrix. The PQQ can be obtained from bsfpqq@wandsworth.gov.uk and from the contact point and address in the OJEU.

11. Conflicts of Interest

11.1 The Local Authority is concerned to avoid conflicts of interest. In particular Bidders should note that the Local Authority is likely to regard a conflict of interest as arising where a Bidder and/or a member or members of its supply chain have been involved in advising the Local Authority on matters relating to this project, or in the preparation of documents or information relating to this project.

11.2 A conflict may also arise where a Bidder and/or a member of its supply chain has been involved in advising the Local Authority on other BSF projects.

11.3 A conflict may also arise where a staff member from a Bidder and/or member of its supply chain is related to one of the Local Authority's officers or Council members.

11.4 Bidders should note that the Local Authority reserves the right to disqualify Bidders and/or supply chain members where there is an actual or potential conflict of interest. Bidders are therefore advised to review carefully the prior or current involvement of the Bidder and its supply chain members with the Local Authority and to contact Wandsworth's BSF Project Director prior to submission of the completed PQQ to discuss actual or potential conflicts they have identified.

Appendix A

Part 1

Summary of the LEP Model

1. DCSF and PUK set up PFS to manage the delivery of the BSF programme.
2. BSFI is the body established by DCSF and PUK to invest in BSF Schemes.
3. PFS has worked with its team of legal and financial advisers, and with the 4ps and pathfinder local authorities, and developed a delivery model for BSF.
4. The limited liability company established to deliver the BSF model is called the Local Education Partnership or LEP.
5. Responsibility for the strategic allocation of their BSF funding rests with local authorities. The LEP model seeks to create a local delivery vehicle through which the strategic capital investment made available by BSF can be efficiently and effectively deployed by local authorities into their secondary schools estate.
6. At the core of the LEP model is the creation of a public private partnership (PPP) between a local authority responsible for a BSF area programme, BSF Investments LLP and a Private Sector Partner (PSP) selected in open competition under EU procurement rules. This PPP is the LEP. It will be a joint venture company focused around the delivery of the strategic investment programme for the relevant area.
7. The LEP will:
 - (a) **work with the local authority and other local stakeholders to develop strategic investment plans for secondary education for the area;**
 - (b) **act as the single point of contact for the procurement and delivery of all the services needed to deliver the investment programme ranging from design, construction, project management and maintenance to ICT services;**
 - (c) **integrate and manage a diverse range of supply chain sub-contractors, ranging from building contractors and FM services providers to ICT suppliers; and**
 - (d) **enable delivery of projects through a mix of procurement routes.**
8. The LEP will enter into a 10-year strategic partnering agreement (SPA) with the Local Authority, with an option to extend this agreement for a further 5 years. The partnering agreement will give the LEP the first right to deliver the projects identified in the strategic plan, subject to meeting defined approval criteria set out in the SPA. These approval criteria will involve:
 - (a) **demonstrating that the LEP's proposals meet the strategic requirements of the local authority, are value for money and affordable to the local authority, and will be compliant with legislation and regulations;**
 - (b) **demonstrating a good track record on the delivery of projects previously approved by the local authority; and**
 - (c) **demonstrating performance against a continuous improvement plan put in place through the initial procurement, and reviewed from time to time.**
9. A LEP will have two main strands of activity:
 - (a) ***new project development*: new projects will be delivered through the provision of partnering services to the local authority, where it will work with the local authority and other local stakeholders to identify suitable projects for each phase of the local investment programme, and put forward proposals for those projects for approval by the local authority. In particular, the LEP will be responsible for ensuring that the design and planning for accommodation services and ICT provision in BSF schools is properly integrated; and**
 - (b) ***delivery of approved projects*: the LEP will procure the delivery of approved projects through a supply chain, which will be benchmarked and periodically market tested to demonstrate value for money. Again, the LEP would be responsible for managing the interfaces between various supply chain members so that an integrated service (including both accommodation and ICT provision) is provided to the local authority**
10. The LEP will recover its costs and earn returns through the contracts that it successfully delivers. It will be incentivised to work up proposals that result in successful projects, and which meet the requirements of the local authority.
11. The LEP will be responsible for maintaining and developing long term supply chain relationships that bring about continuous improvement in the delivery of new projects as the local programme unfolds. It is expected that experience from the delivery of approved projects will feed back to improve the quality of future proposals.

12. The LEP will enter into contracts with the Local Authority for all the new projects approved by the Local Authority under the Strategic Partnering Agreement.
13. In the case of conventionally funded schemes, there are two BSF standard form Design and Build Contracts: the lump sum option is the preferred route for all projects. However, in all cases, local authorities will need to ensure that arrangements are in place to provide for the long term maintenance of BSF schools once they are renewed.
14. All BSF schools will need to have ICT provision that enables effective curriculum delivery. A managed ICT service will be procured for all BSF schools, and the LEP will be expected to provide for the effective integration of ICT provision with school buildings at all levels in design and planning, in procurement and installation and in ongoing service delivery. It will need to demonstrate how this will be achieved in its proposals for new projects. Where new ICT infrastructure or services are required as part of the local strategy, these will be contracted through ICT contracts between the Local Authority and the LEP, rather than being included as an element within the building contracts. However, the LEP will remain responsible for managing the interface between the ICT and building supply chains so that the Local Authority receives an integrated service.

Part 2

The LEP Model: Partnering

The Role and Nature of the PSP

15. The PSP is expected to bring to the partnership the skills, expertise and experience necessary to ensure both the delivery of the Sample Schools and the delivery of new projects as may be identified, agreed and specified in future. It is also expected to enable the LEP to be the body that is capable of taking a strategic view of estates planning, to meet the education plans and strategic objectives of the Local Authority, to meet the service requirements identified in the SfC (whether by effective supply chain management or otherwise) and to maximise the potential of property and school facilities in order to generate value for the shareholders in the LEP and facilitate the extended use of the facilities.
16. The PSP will also need to have a thorough understanding of the complexities of the BSF Programme in order to enable the LEP to manage the many interfaces between different parts of the supply chain.

Role and Nature of the SPB

17. The Local Authority's SfC by its nature requires extensive input and buy-in from local partners and stakeholders including voluntary aided schools, voluntary aided sponsors, other stakeholders, head teachers, school governors, the Learning & Skills Council, unions, Primary Care Trusts and social services. At financial close, the Local Authority will establish a SPB, which has adequate representation of all these partners and stakeholders. The SPB is tasked with meeting periodically, recommending evaluations of and revisions to the SfC, and agreeing what work needs to be done to support its further development. However, the Local Authority retains sole discretion as to the final content and form of the SfC and as to whether recommended revisions should be incorporated. The SPB will formally approve the SfC and any revisions to it. The SPB is also the forum through which the proposals and approvals for New Projects are considered, in accordance with the procedures set out in the SPA.

The LEP Model: The Partnering Services

18. Partnering Services are addressed in Schedule 11 (Local Authority Partnering Requirements) and Schedule 12 (LEP Partnering Proposals) of the SPA.
19. The focus of the Partnering Services is to achieve the transformational change detailed in the SfC for the Local Authority.
20. Partnering Services will cover the following areas of activity:
 - (a) general requirements of the LEP;
 - (b) development of the SfC for the area covered by the Wandsworth BSF Programme;
 - (c) new project development;
 - (d) delivery of Approved Projects;
 - (e) value for money and continuous improvement; and
 - (f) change management services delivered in the context of the ICT investment

In fulfilling its role, the LEP will need to work closely with the Local Authority, its partners and local stakeholders, such as school governing bodies, voluntary aided sponsors, head teachers and pupils. It will also need to be clear about the respective roles and responsibilities of the LEP and the Local Authority in the

- partnership. This should result in the LEP adding value to the Local Authority's BSF Scheme by complementing and supplementing local expertise and capacity.
- 21 The purpose of the SPA is to create a long term partnership and to ensure the provision of high quality education services. In the SPA, the LEP and the Local Authority agree to commit themselves to the programme in the SFC and to achieve specific partnership objectives and targets. These are the continued improvement of educational standards in the area and specific local targets and objectives.
- 22 In addition, the LEP must be able to demonstrate value for money over the long term to the Local Authority. This will be achieved through competitive procurement for the Sample Schools, through benchmarking and market testing for New Projects and through continuous improvement as set out in the Continuous Improvement Plan (a document that needs to be submitted as part of the response to the IPD, which is described in greater detail in Part [4] (Value for Money, Performance Monitoring and Continuous Improvement) of Volume [1-C] (LEP Partnership Initial Bid Requirements of the IPD)).
- 23 After selection of the PSP, the Continuous Improvement Plan will form Schedule [15] (Format of Continuous Improvement Plan) of the SPA and will be subject to local development in conjunction with the LEP business plan.
- 24 All targets in the Continuous Improvement Plan will be assessed as part of the New Project Approval Procedure set out in Schedule 3 (New Project Approval Procedure), paragraph [4.4(b)] of the SPA. Continuous Improvement Targets which are based on LEP KPIs, as set out in Schedule 14 Part 2 (Track Record and Key Performance Indicators) of the SPA, will also be assessed through the Track Record Test. The Continuous Improvement Targets applied to the LEP KPIs will replace the LEP KPI Target for the purpose of this Track Record Test.
- 25 Continuous Improvement Targets should be set for year on year improvement and will also be assessed against a baseline of the original LEP KPI targets as finalised at the signing of the SPA unless otherwise agreed by the Local Authority and PFS subsequently.
- 26 The LEP (and other members of the SPB) will periodically review the Continuous Improvement Plan and make amendments and improvements as agreed between the parties.
- 27 There will be changes to the national performance frameworks, inspection regimes, LEP KPIs and specific targets for a Local Authority over the life of the SPA. The contribution of the LEP to the continuous improvement of Local Authority services will need to be sustained throughout the life of the agreement and will need to be responsive to such changes.

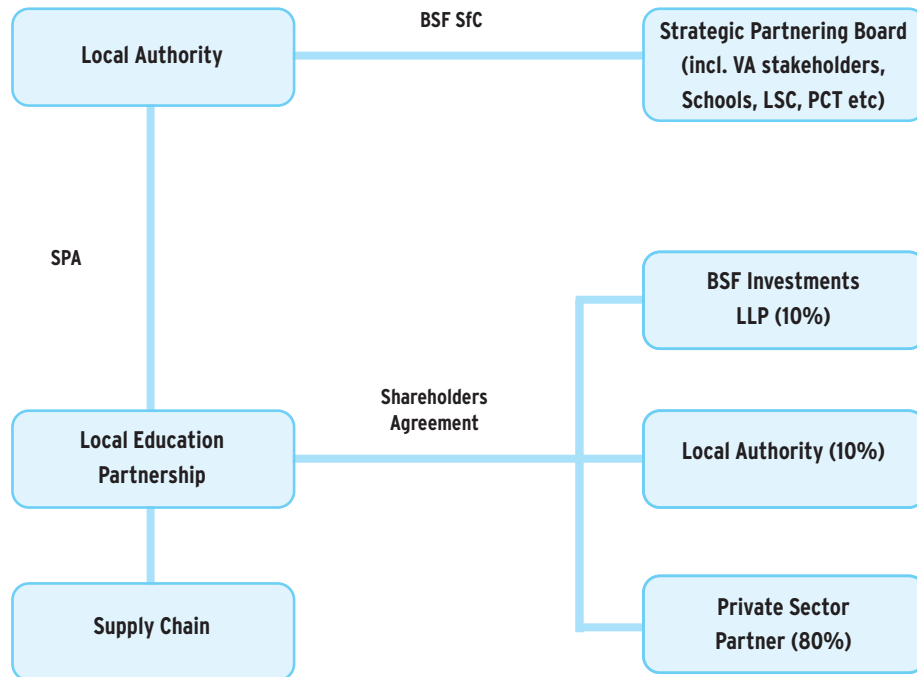
Part 3

The LEP Model: Contractual Structure and Standard Documentation

- 28 The Draft Agreements will be included in Volume 2 of the IPD.
- 29 Bidders are referred to the Economics of the LEP Guidance Note on the PFS website (www.partnershipsforschools.org.uk), which explains the economics of a typical LEP, and how it is anticipated that the various contracts described below will work in relation to the cash-flows of the company.
- 30 It is anticipated that bidders will seek to develop a LEP model that is as efficient as possible in the delivery of Partnering Services. This should include:
- (a) **effective passing down of costs through established supply chains;**
 - (b) **maximising use of "in-house" resources at Local Authority and PSP level so as to avoid the duplication of effort and roles;**
 - (c) **maximising efficiencies and delivering genuine continuous improvement;**
 - (d) **establishment of, and management to, a clearly understood Business Plan which reflects the SBC; and**
 - (e) **being reflective of the level of activity required under the SBC and not incurring unnecessary overheads.**

Strategic Partnering Arrangement

31 The basic LEP model structure is as follows:



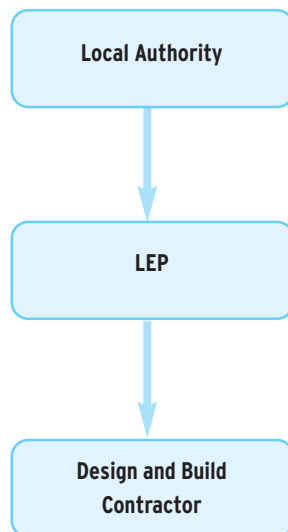
32 Following the selection of the PSP, the LEP will be established as a joint venture company limited by shares, with the three shareholders signing the Shareholders' Agreement (SHA). The three shareholders will be the PSP, the Local Authority and BSFI.

33 The LEP once incorporated will enter into the SPA with the Local Authority. The SPA will set out the exclusivity granted to the LEP to develop and deliver new projects, and the terms under which such exclusivity will be granted including the provision of Partnering Services, compliance with a two-stage approval process as well as demonstration of continuous improvement and value for money.

34 Once New Projects are approved under the terms of the SPA, the Local Authority will enter into contracts for them, either directly with the LEP, or with subsidiary project companies set up by the LEP. On successful financial close of each New Project, the LEP will earn a Project Management Fee to recover its working capital invested in the development of that scheme. It is assumed that the Sample Schools will reach financial close simultaneously to the establishment of the LEP.

Contractual Structure for Conventional Projects

- 35 For conventionally funded projects, the Local Authority will enter into a Design and Build Contract for the delivery of the schools' project. The Design & Build Contract will require the LEP to design and build the schools facilities to the Local Authority's output specifications. Payment will be made by the Local Authority to the LEP on the achievement of milestones set out in the contract.
- 36 The BSF Design and Build Contract comprises two options, as follows:
- (a) a **Lump Sum Option** – a fixed-price contract which is to be used for projects which are predominantly or exclusively of a new build nature; and
 - (b) a **Target Cost Option** – a cost-reimbursable contract which is to be used for projects which are predominantly or exclusively refurbishments.
- 37 Wandsworth's preference is to use the lump sum option for all D&B contracts.
- 38 The contractual structure for the Design and Build Contract is likely to look like this:

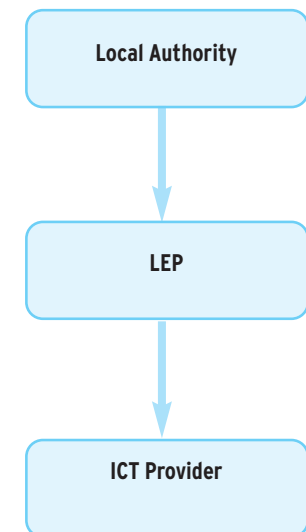


Contractual Structure for FM Services

- 39 Once a BSF school has been procured under a conventionally funded Design and Build Contract, there will be on-going bespoke maintenance requirements identified for each school which will involve the Local Authority requiring the LEP to price and contract for such facilities management arrangements.

Contractual Structure for ICT Services

- 40 BSF schools will require ICT facilities, and it is required that these be provided as an integrated ICT managed service. The ICT Services will be delivered under an ICT Services Contract, which will place design, installation, managed service, and training obligations on the LEP. Payment for the installation phase will be made in milestones against implementation stages, and payments for the service period will be paid through on-going service charges against pre-set performance standards.
- 41 The Wandsworth ICT Services Contract is based on a 7 year operational period and is intended to govern a specific delivery phase (i.e. an identified grouping of schools in respect of which funding has been made available). It has been assumed that each delivery phase will be structured so that the completion dates for the first and last schools in a phase are relatively close (typically no more than 12-18 months apart). It is envisaged that there will be a separate ICT Services Contract for each group of schools in a defined delivery phase (within the LEP concession period).
- 42 The contractual structure for the ICT Services Contract is likely to look like this:



Interface Issues

- 43 BSF is a complex programme, involving the management of many interfaces between different parts of the supply chain. A range of interface issues have been identified, which will need to be managed by the LEP, and these will be set out in the Interface Issues Paper (appended the IPD at Volume [I-C(d)] (Interface Issues)), together with suggestions on how such issues might be addressed.
- 44 Bidders will be expected to demonstrate how they intend to manage the interface between the supply chain members and importantly that funders, where appropriate, have approved such interface arrangements.

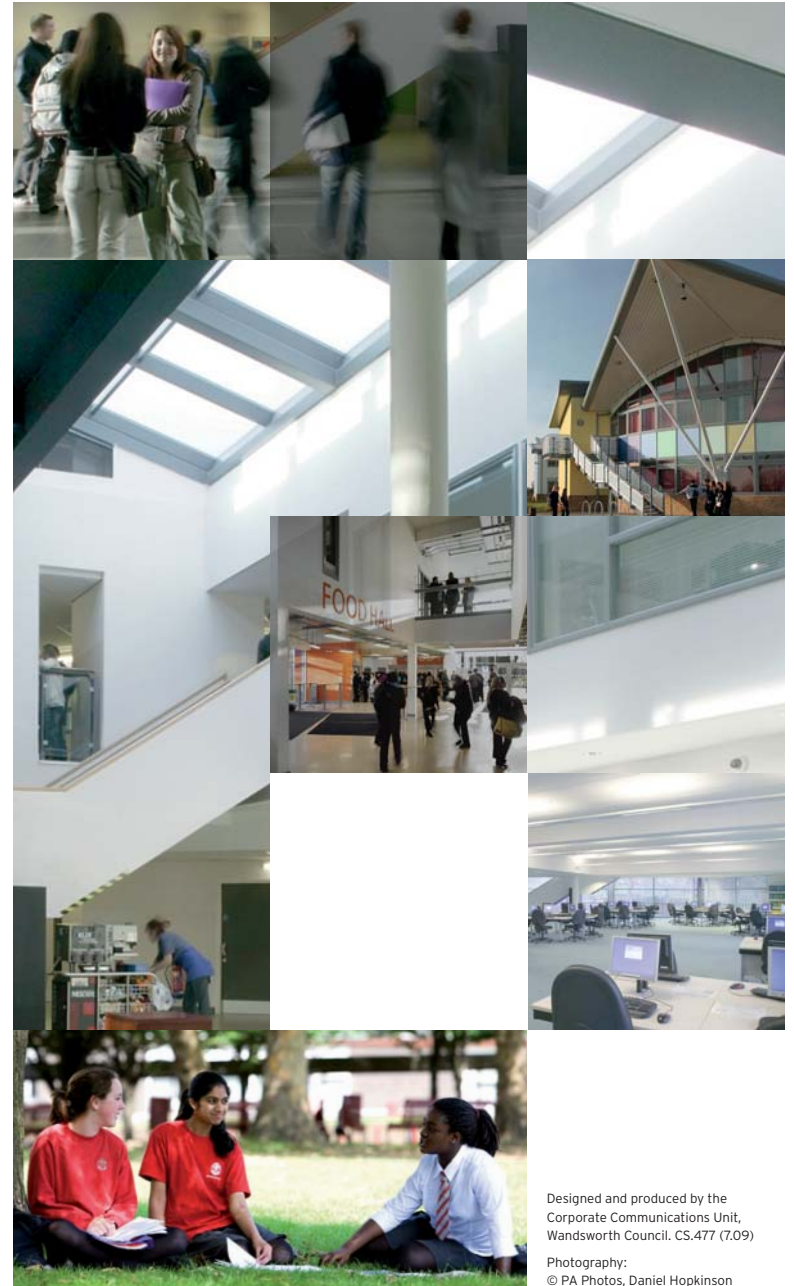
Benchmarking

- 45 Under the SPA, the LEP is granted, by the Local Authority, a 10 year period of exclusivity to develop facilities and deliver services, with the scope of facilities and services having been set out in the OJEU Notice and accompanying procurement documents through which the establishment of the LEP is procured. The implications of this for a Local Authority are significant, in that, through a rigorous approval process set out in the SPA for Stage 1 and Stage 2 of the New Project Approval Procedure, the LEP needs to satisfy the Local Authority that the proposals put forward by it represent value for money; and one of the ways in which the LEP can do this is by comparing the costs of the New Projects against local, regional and national benchmark data.
- 46 Benchmarking has been at the heart of the BSF initiative since its inception, with the intention that procurement timelines will be accelerated greatly by having a national baseline against which new proposals can be assessed and so approved.
- 47 To provide a firm foundation to benchmarking as a credible tool, PfS is also investing in setting up and maintaining a national database of information on costs and performance across all LEPs in the programme. PfS will use this database to create appropriate local, regional and national benchmarks which will then be shared with Local Authorities, as described in the benchmarking procedure.
- 48 The paper entitled Benchmarking Procedure for Demonstrating the Value for Money of Non-Sample Schools ('the Benchmarking Paper') is available from the PfS Website, sets out the benchmarking procedure and how it is intended to be applied by the LEP. It also details the manner in which PfS will seek to manage the quality of national benchmarking data to support local programmes.

Benchmarking Cost, Quality and Performance

- 49 The benchmarking procedure described in the Benchmarking Paper refers to quite a specific exercise of comparing the costs of a New Project developed by a LEP against comparator information from other similar BSF schemes in order to evaluate value for money. This does not mean, however, that the evaluation of the scheme itself will focus on cost alone. On the contrary, the demonstration of value for money from a cost perspective is only one of the approval criteria in the SPA, and the Local Authority will separately evaluate whether or not the proposed scheme meets its educational service requirements, design quality standards and other Local Authority Requirements. This should primarily be done through the creation of Local Authority Requirements as defined in [Clause 2.3.] Schedule 3 of the SPA. To pass muster, the LEP proposal must meet all the approval criteria, which together enable the Local Authority to determine the value for money, which encompasses the cost, quality and timeliness of the LEP proposals.
- 50 In addition, PfS intends to conduct a regular performance benchmarking exercise across all LEPs in the national BSF Programme, focusing primarily on the Key Performance Indicators set out in Schedule 14 of the SPA.
- 51 Performance benchmarking will provide Local Authorities with a clear assessment of how their LEPs are doing overall compared to others in the BSF Programme. Performance benchmarking will be an on-going assessment of LEP achievement intended to encourage best practice through partnership working.

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