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From: Michael Coleman [Michael.Coleman@partnershipsfor schools.org.uk]
Sent: 15 March 2011 14:53
To: [REDACTED]
Cc: Tim Byles; Sal Wilson; HEALEY, Sarah; CUNLIFFE-MILLER, Jobshare; [REDACTED] David Burns
Subject: RE: Documentation for JR LA site visits
Importance: High

Colleagues have reviewed the condition index and come up with the following comments:

My comments

- A- Excellent, Even buildings which are just 2-3 years old will no longer have an 'as new appearance' and could be pushed into the next category
- B- Minor defects - this could apply to all but new facilities
- C- Average condition, does not really sit comfortably with the term 'significant defects'
- D- Poor- what is meant by 'inferior appearance'?
- E- Very Poor - Essentially this suggests accommodation should be rebuilt
- F- Extremely poor, same as E but perhaps more urgent.

I think the comments against C & D are the only significant issues. Re. the comment against 'E', it refers to how LAs will view it, not how we will present it.

We can use the condition index as currently written, but think these last few issues are worth considering further.

Regards

Michael Coleman
 Regional Operations Director (Central & West)

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 Please consider the environment before printing this e-mail

From: [REDACTED]
Sent: 15 March 2011 12:34
To: Michael Coleman; [REDACTED]
Cc: Tim Byles; Sal Wilson; Sarah Healey; Stuart Miller; [REDACTED]; David Burns
Subject: RE: Documentation for JR LA site visits

Mike,

19/01/2012

Attached is the methodology with just a few changes. The second document is a revised annex 2, the condition index; this version focuses on the condition of the building and does not offer solutions.

Happy to discuss. Thanks [REDACTED]

.....
[REDACTED] **Simons**

Central Capital Unit, Department for Education

4th Floor, Sanctuary Buildings
Great Smith Street
London SW1P 3BT

please note new email: [REDACTED]

Tel: [REDACTED]

Department for
Education

From: Michael Coleman [mailto:Michael.Coleman@partnershipsforschools.org.uk]

Sent: 14 March 2011 13:29

To: [REDACTED]

Cc: Tim Byles; Sal Wilson; HEALEY, Sarah; CUNLIFFE-MILLER, Jobshare; [REDACTED]
David Burns

Subject: Documentation for JR LA site visits

Importance: High

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[REDACTED]
Please find attached the draft documents for the site visits to JR LA schools. [REDACTED] has already seen the agenda.

We would be grateful if you could confirm that the documents have been signed off at the appropriate level within CCU. We intend to use these documents at the first 'kick off' meeting on Wednesday, in Luton, so a speedy response would be much appreciated.

Regards

Mike

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19/01/2012

Condition index

Rating	Status	Definition of rating/condition of building asset
A	Excellent	No <u>significant</u> defects As new condition
B	Good	Minor defects Superficial wear and tear Some deterioration to finishes Major maintenance not required
C	Fair	<u>Isolated non structural</u> defects are evident Worn finishes require maintenance Services are functional but need attention Deferred maintenance work exists
D	Poor	<u>Re-occurring defects, some of potential structural nature.</u> <u>Defects affecting whole elements.</u> <u>Some whole elements in need of upgrade or replacement</u>
E	Very poor	Building is beyond economic repair
F	Extremely poor	Building has failed Not operational Not viable Unfit for occupancy Environmental/contamination/pollution issues exist

Deleted: Average condition ¶
Significant

Deleted: Badly deteriorated

Deleted: ¶
Potential

Deleted: problems

Deleted: Inferior appearance¶
Major defects

Deleted: Components fail frequently

Attachment to [redacted]
email 15/3/11 at 12:34 .35

*Attachments
from
previous
email*

DRAFT

BSF Site Visits – Methodology

1. Overview

As part of the response to the recent Judicial Review judgement, PfS has been asked by the Department for Education to conduct site surveys of the schools referred to in the claims of the six Local Authorities.

The Local Authorities involved, and the number of schools to be visited, are: Kent (15 Schools), Luton (2 Schools), Newham (14 Schools), Nottingham (10 Schools), Sandwell (9 Schools) and Waltham Forest (19 Schools). In total there are 68 schools to be visited.

To ensure consistency of approach to school building assessments, the methodology for the site visits and reporting is similar to the exercise recently completed to review the 75 Academy projects which were 'paused for discussion'.

2. PfS contacts

Please direct any queries on the specifics of the site survey process to:

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Michael Coleman at michael.coleman@partnershipsforschools.org.uk, or by phone on 07810 502334, or to:



Any issues regarding the practicalities of arranging site visits, if not dealt with at the initial meeting between PfS and each Local Authority, should be referred to your PfS Project Director, as listed below:

Local Authority	Project Director	Email	Phone
Kent	Andrew Alsbury	andrew.alsbury@partnershipsforschools.org.uk	07825 204876
	Julie Stockdale	julie.stockdale@partnershipsforschools.org.uk	07554 400157
Luton	Mark Friday	mark.friday@partnershipsforschools.org.uk	07554 401511
Newham	Robert Woolgar	robert.woolgar@partnershipsforschools.org.uk	07956 053897
Nottingham City	Joanne Smyth	joanne.smyth@partnershipsforschools.org.uk	07920 453574
Sandwell	Richard Malyon	richard.malyon@partnershipsforschools.org.uk	07825 796762
Waltham Forest	Sunil Patel	sunil.patel@partnershipsforschools.org.uk	07920 453573

3. Site Survey Methodology

a. Preparation - documents

PfS would like to have access to the following ahead of the site visits to each school (subject to Local Authority agreement):

- Local Authority condition data for the schools to be visited.
- Existing pupil numbers on roll at predecessor school(s).
- Proposed pupil numbers for the school(s), as originally planned as part of the Local Authority's BSF proposals.
- Overall site plan for predecessor school(s) indicating external areas.
- Block plans, indicating room layouts and gross areas.

In addition, PfS has prepared the following:

- A template report document (based on the existing format used for the recent surveys of the 75 Academies 'for discussion'). This is attached as Appendix 1
- Categories of condition based on those used for the 75 academy projects. These are attached as Appendix 2.
- An agenda for initial meetings, and subsequent visits. The agenda for initial meetings has already been circulated. A sample agenda for site visits is attached as Appendix 3.

Please note that Local Authorities should not rely on PfS's site surveys as the basis of any case they wish to make to the Secretary of State, or on statements made to PfS surveyors during site visits. You should, therefore, ensure that all evidence that is considered relevant is included in your submissions, as per the process set out in the letters from Sarah Healey to each Chief Executive.

b. Visits to school sites

- PfS/LA to schedule site visits. It is anticipated that each site visit will take c. 2-3 hours, and that ideally 2-3 site visits will be conducted each day (subject to the proximity of each school site).
- The PfS Technical lead will assess the condition of existing buildings against a range of pre-defined categories of work (please see Appendix 2).
- The PfS Technical lead will also assess site restrictions/constraints, where relevant, and record these on the template survey report (please see Appendix 1).

- The PfS Project Director will gather information on wider issues affecting the school, e.g. geography, trend data on pupil numbers, etc. These will be recorded under heading 2 on the relevant template document (please see Appendix 1). All comments will subsequently be amalgamated onto a single master copy, as the Technical lead and Project Director may complete their activities separately during the visit.

c. Capacity

- PfS will assess the capacity of the predecessor school(s) to meet projected pupil numbers, as provided by the Local Authority.
- PfS will assess whether additional capacity is required for proposed numbers on the school sites visited, but this should not be taken to indicate an acceptance of the Local Authority's case for increased capacity, as other solutions may be considered.
- PfS to report its findings using the relevant template document (please see Appendix 1).

d. Moderation

- PfS will collate all reports once the surveys have been completed.
- PfS/DfE will moderate a sample of projects to ensure a consistent approach has been taken.

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e. Communication of site survey outcomes

- The final reports will be provided to DfE.
- The DfE will communicate the outcomes to Local Authorities. .

4. Proposed Timescale

The following timetable will be used for the site survey process only:

Task	Start	End
Preparation	08/03/2011	15/03/2011
Kick off meetings	16/03/2011	22/03/2011
Site Visits	21/03/2011	15/04/2011
Reports	18/03/2011	20/04/2011
Moderation	21/04/2011	21/04/2011

Local Authorities should refer to the DfE with regard to the timetable, or any other aspect, of the overall process.

Appendix 1 - BSF Site Visit Report

School Name			
Local Authority		Date of visit	
Meeting attended by			
Current NOR		Proposed NOR	
Existing GFA m²		Required GFA m²	

1. Condition of Existing Buildings				
Reference	Approx. Age/ Build Type	Gross Floor Area m ²	Condition Category	Comments / Risks / Issues
<u>1.1 Block A</u>				
<u>1.2 Block B</u>				
<u>1.3 Block C</u>				
<u>1.4 Block D</u>				
<u>1.5 Block E</u>				
<u>1.6 Block F</u>				
<u>1.7 Block G</u>				
<u>1.8 Block H</u>				
<u>1.9 Block I</u>				
<u>1.10 Block J</u>				
<u>1.11 Block K</u>				
<u>repeat as necessary...</u>				

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2. Relevant site specific issues (levels, known ground condition issues, planning restrictions (e.g. green belt), etc.)

Appendix 2 - Condition Categories

Category	Internal Areas	External Envelope
A	No significant condition issues	No significant condition issues
B	Condition issues restricted to cosmetic decorations, replace carpets (Timescales to be considered in each case)	Condition issues restricted to minimal external redecoration only (Timescales to be considered in each case)
C	Condition issues restricted to B, plus need to consider, for example: <ul style="list-style-type: none"> • cosmetic decorations, • replace carpets, • joinery repairs, • minimal replacement of doors. (Timescales to be considered in each case)	Condition issues restricted to B, plus need to consider, for example: <ul style="list-style-type: none"> • complete redecoration externally, • isolated external joinery repairs, • roof repairs, replace flashings, etc. (Timescales to be considered in each case)
D	Condition issues identified include need to consider, for example: <ul style="list-style-type: none"> • replacement of joinery, • replacement M&E fittings , • replacement sanitary fittings. But NO structural alteration. (Timescales to be considered in each case)	Condition issues identified include need to consider, for example: <ul style="list-style-type: none"> • provision of new roof coverings, • replacement of external joinery, fascias and the like, • window and external door replacement, • isolated masonry repairs. But NO structural alteration. (Timescales to be considered in each case)
E	Condition issues identified include need to consider complete replacement of internal fabric, plus structural alteration/remodelling (Timescales to be considered in each case)	Condition issues identified include need to consider, for example: <ul style="list-style-type: none"> • roof covering replacement, • curtain walling/window replacement, • masonry repairs, • some structural alterations (to be specified) (Timescales to be considered in each case)
F	Demolish and/or New Build	Demolish and/or New Build

Agenda for Initial Meeting re. Site Surveys

[Name of LA]

[Date of meeting & venue]

1. Introductions
2. Terms of reference for site surveys *[provide handout and go through]*
3. Survey form and supporting info *[provide handout and go through]*
4. Existing information that may be available *[ask LA whether they are willing to share existing condition survey data ahead of visits]*
5. Confirm format of visits *[who attends from PfS, and preferred way to conduct visits, as per ToR, and specific reference to LA needing to ensure it sends any info that it believes supports its case to DfE, not rely on PfS visits to capture the same]*
6. Confirm dates for visits
7. AOB

Site Visit Agenda

1. Arrive at site and sign in to be taken to Headteacher
2. Introductions
3. PfS explain methodology for site visit
4. Agree site visit route for PfS reviewer
5. Headteacher/Other stakeholders (e.g. Chair of Governors) set out site issues (to PfS Project Director), as per Section 2 of survey form
6. Start site visit to complete Section 1 of survey form (and Section 2, where appropriate)
7. Conclude site visit
8. Sign out and depart site