

**DES – Statutory Testing /  
Compliance & Bid Preparation  
Workshop**



# Introduction

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**The Alternative Professional Property Support Service For Schools**

# Items Covered in This Workshop



- Statutory Testing / Compliance Guidance
- Guidance Regarding Capital Bid Preparation - What makes a good bid and successful project

# Statutory Testing & Compliance



## Objective:

**To provide MAC's, Academies & Individual Schools with information and guidance regarding BDES expectations and requirements to ensure all parties are executing their statutory responsibilities with regard to the effective & safe management of the school estate.**

- Who is responsible for ensuring compliance with statutory requirements?
- Process to enable the “Duty Holder” to ensure compliance
- Challenge property support providers to assist every step of the way
- Site Staff responsibilities / compliance checks

# Who is Not the Duty Holder



- The Diocese
- The Council
- The Property Consultants who support the School
- The Contractors Carrying out the Checks
- The Caretaker / Site Staff

# Who is The Duty Holder ?



*The responsibility for the delegated School / Academy budget for the day to day management of the Diocesan asset / property;*

***“Headteacher / Principal”***

*This person can delegate this duty to the SBM for example but they still retain the responsibility / accountability for ensuring all aspects of Property Management are effectively carried out.*

# Process to ensure the “Duty Holder” maintains compliance



- Allocate a nominated person with budget responsibilities / ability to place orders to work with chosen providers to manage compliance process
- List of items that require testing / servicing & when / how often
- Costs obtained for each item and order placed
- Record when visits / testing due and ensure these happen
- Review certificates / reports from inspections to check any further actions / remedial works required
- Arrange [quotes if necessary] remedial works and ensure all items closed out
- Record new due dates etc, budget accordingly based on previous years costs and maintain an annual planner

# Challenge property support providers to assist every step of the way



- All of the information on previous slide needs to be available on site and you need to know this is in place & you are compliant
- Whoever is providing your property support needs to help / assist you in this process
- If you receive a report saying remedial work is needed, get your property support company to review: Is it necessary? Is the cost reasonable? Should we get an alternative quotation?



# Site Staff responsibilities/ compliance checks



Weekly/Monthly site checklist for site staff to be performed alongside the daily routines and service/maintenance visits made by contractors

System	Frequency	Method of Test
Fire Alarm	Weekly (same day/time)	Test key operation – different call point each week in rotation
Automatic door holders and closers connected to the fire alarm	Weekly (at the same time as the fire alarm)	Confirmation that doors release and close with the operation of the fire alarm
Fire extinguishers, fire blankets, hose reels etc	Weekly	Check that the equipment has not been relocated or tampered with. Ensure seals are intact and the pressure gauge has not dropped.
Fire doors, Fire Exits and Entrance/Exit Doors	Weekly	Check that the doors are operational and closing fully
Green boxes	Weekly	Different point each week - Confirmation that doors release when pressed
Flushing of little used outlets and showers	Weekly	Flush out infrequently used outlets (including showerheads and taps) for minimum of 5 minutes per outlet
Emergency pull cords (disabled)	Monthly	Check alarm works when cord is activated
Emergency Lighting	Monthly	Operation of test switch or circuit breaker and check that the light illuminates

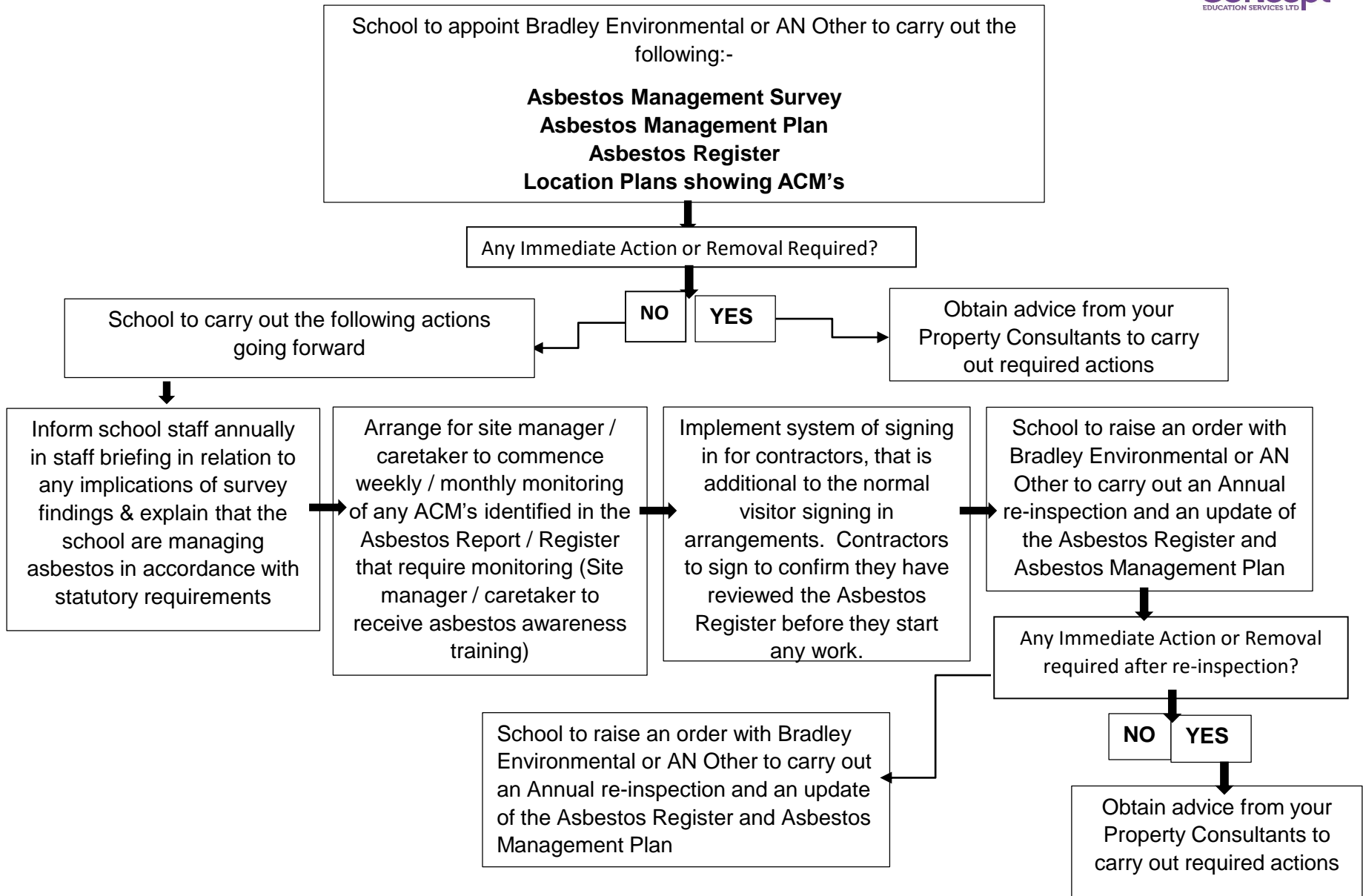
# Control of Asbestos Regulations 2012



Major issues at almost all schools we start working with so brief headlines for consideration;

- Regulations changed in 2012 so your latest management survey, asbestos management plan, register and location plan etc should be dated after 2012
- Annual re-inspections by accredited / licensed asbestos analytical company
- Training – Duty to Manage / Asbestos Awareness
- Informing Contractors / Staff
- Refurbishment & Demolition Survey for all schemes

# Day to Day Asbestos Management Flow Chart



# Managing Your Building & Support Available



- Must use building consultants to manage projects
- DES have approved list on website [Concept are one]  
<https://www.bdes.org.uk/professional-partners.html>
- Must have Landlord Approval document completed and signed prior to starting works on site

# Managing Your Building & Support Available



- Master Planning for each school  
[Individual schools or MAC]
- Condition items / Items identified from  
statutory testing / Expansion & pupil  
places
- Develop short / medium & long term  
priorities
- Review available funding streams and  
budget accordingly

# Guidance Regarding Capital Bid Preparation - What makes a good bid and successful project



## Bid

- Read & understand bid criteria
- Know your building and what schemes are more likely to be successful
- Plan financially for bid - level of school contribution is now critical
- Utilise Salix for compliant schemes – Consultants to do calculations
- Appoint a consultant early to give time for quality bid to be prepared
- Challenge consultant on fees, design, guarantees etc.
- Provide consultant with things such as confirmation of school contribution, Salix loan, gas and electricity bills (Salix)
- Evidence to support bid - Conditions Survey, Fire Risk Assessment, Health and Safety reports
- Be aware if there of charges for the preparation of bid if unsuccessful

# Management of Successful Projects



## Prior to Bid

- Be involved – understand these are your schools, not the consultants
- Understand/sign off design/scheme proposals – making good, cleaning, removal of old equipment etc
- Ensure adequate/transparent tender process
- Ensure suitable contractors used for tenders by consultant
- Ensure relevant guarantees etc. are included in tender documents

# Management of Successful Projects



## Upon Successful Bid

- Full involvement on planned programme – understand exactly what happens
- Ensure consultant provides and checks CDM paperwork prior to start of project
- Approve any design/cost changes
- Have pre-contract meeting and update meetings
- Agree restrictions with consultants/contractors – SATS/working hours etc.
- Challenge consultants to be a visible presence during works and have all contact details for emergencies etc.
- Understand any operational issues impacted by works
- Obtain financial breakdown/information for audit purposes from consultants



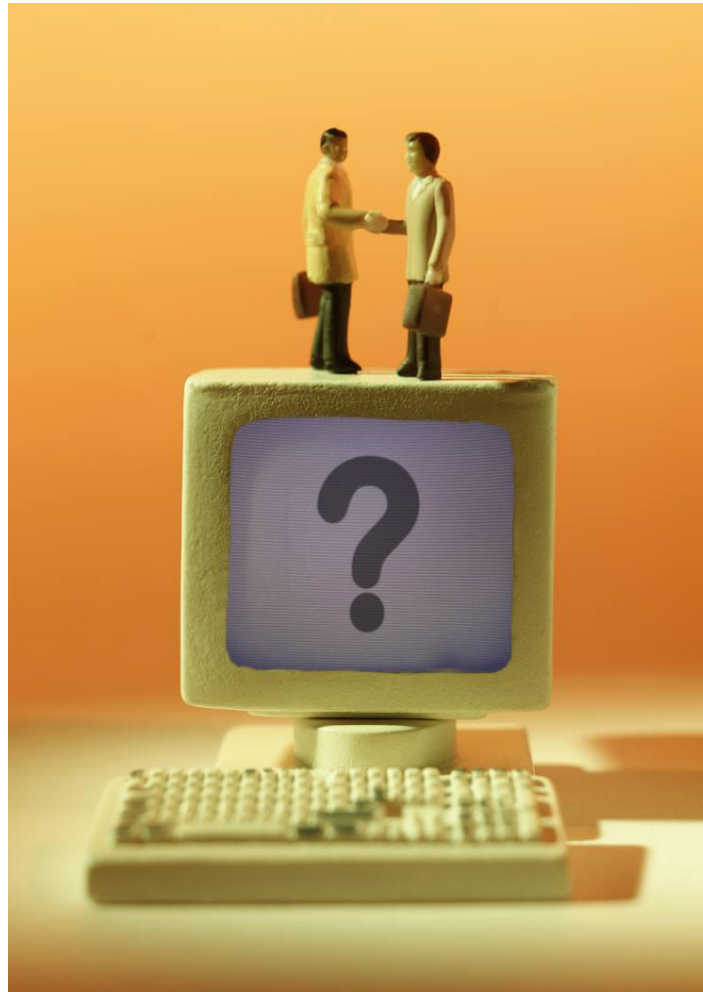
# School Condition Allocation



**MAC's with at least 5 academies and more than 3000 pupils receive an annual allocation of SCA**

- There needs to be a transparent process for allocating these funds – not a case of he/she who shouts the loudest
- Independent conditions surveys provide information across the MAC - need for additional places/basic need
- Funds to be allocated based on need
- Schools to contribute to make the SCA go further
- Contingency for emergencies
- Challenge consultants to manage schemes effectively
- Reinvest underspends on next highest priority

# Any Questions?





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