



PfS National Framework

Guidance Document

BSF and One School Pathfinder Projects

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Abstract	
<p>This Guidance document has been developed in order to provide the Local Authorities using the PfS National Contractors Framework to deliver One School Pathfinders with guidance, direction and instruction in the process in order to implement the Framework effectively and efficiently. It also seeks to ensure that the Local Authority, who in effect will be the Framework User, is able to undertake the Local Competition process in a manner that enables compliance with all applicable regulations. The document details:</p> <ul style="list-style-type: none">(a) The processes that the Framework User needs to go through;(b) The documents that are relevant to the conduct of the procurement process. This could be either documents to be produced by the Framework User or other guidance documentation that would be of benefit to the Framework User;(c) Other physical deliverables required of the Framework User; and(d) Typical timescales for driving the procurement process through. <p>This Guidance document should be read in conjunction with the following documents:</p> <ul style="list-style-type: none">(a) Guidance for Framework Users on Local Competition;(b) Preliminary Invitation to Tender (PITT);(c) Invitation to Tender (ITT);(d) Outline Business Case Guidance;(e) Design User Group Guidance;(f) PfS Framework Technical Adviser Scope of Services	

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1. INTRODUCTION

- 1.1 Partnerships for Schools (PfS) has established a national framework (“the Framework”) of six design and build (D&B) contractors (hereafter referred to as “Panel Members”) that are capable of delivering single or small grouped school schemes.
- 1.2 PfS anticipates that the Framework will be used to deliver:-
 - (a) single school projects, for example an Academy or a secondary school funded by the Department for Children, Schools and Families’ (DCSF’s) BSF One School Pathfinder (“Single School Schemes”) and other educational facilities;
 - (b) grouped school projects to be procured all at once (“Bundled Schemes”); and
 - (c) grouped school projects to be procured in more than one phase (“Batched Schemes”).
- 1.3 The purpose of this Guidance is to provide Local Authorities who are delivering One School Pathfinders (the “OSP Projects”) using the Framework with guidance on how to use the Framework and conduct a “Local Competition” to select a Panel Member off the Framework. For clarity, references within this document to the “Local Competition” relate solely to project procurement and are unrelated to the competitions run by authorities to decide the governance and ethos of new schools.
- 1.4 The Framework was procured under the restricted procedure of the Regulations and Framework. Users should note that the Local Competition is intended to operate as set out in this Guidance - in particular, the Design and Build Contracts (“Building Contracts”) must be used to contract with a Panel Member – the use of an alternative form of Building Contract will not be permitted.
- 1.5 All Framework Users will be required to enter into a Memorandum of Understanding (MoU) with PfS prior to OBC approval, which will stipulate the terms under which the Framework will be managed and the information available to Framework Users. Framework Users will also be required to sign a Confidentiality Agreement in order to have access to rates and price information provided by the Panel Members – this information may be of assistance to the Framework User when assessing bids from the shortlisted Panel Members at the ITT stage.

2. USE OF FRAMEWORK FOR ONE SCHOOL PATHFINDER PROJECTS

Local Authorities delivering OSP projects will be required to follow the advice and guidance contained within the PfS guidance document ***The Local Competition***. This document details:

- (a) The process to follow in using the Framework;
- (b) The documents required to be produced;
- (c) The timescales deploying the processes within the Framework

2.1 Development of Outline Business Case (OBC)

- (a) Local Authorities delivering BSF One School Pathfinder (OSP) projects will be required to develop an Outline Business Case in respect of the OSP Project;

- (b) Local Authorities are advised to follow the guidance contained within the PfS **Outline Business Case Guidance** documentation in order to develop the OBC for the OSP Project;
- (c) Local Authorities are further advised to follow the guidance contained within the PfS **Design User Group Guidance** documentation in order to set up the Design User Group that will serve, develop and deliver the design brief for the school. In this instance, the role of the Sponsor detailed within the Design User Group guidance will be executed in the main by the representative of the School.
- (d) Local Authorities undertaking OSP Projects will be required to submit their OBC to the DCSF for approval

2.2 Academy Project Support Funding

Local Authorities undertaking OSP Projects are not entitled to Academy Project Support Funding. The overall funding envelope for the OSP project will already have been indicated to each Local Authority. Each authority will either need to deliver the entire project (including the management of it) within the overall budget or will need to meet any shortfalls.

It is important to note that PfS will not provide any project management support to One School Pathfinder projects

2.3 Preliminary ITT

Following approval of the OBC for the OSP project, the Local Authorities will then be entitled to access the Framework. Local Authorities are advised to follow the guidance within the PfS guidance document **The Local Competition** as well as utilise the **Preliminary Invitation to Tender (PITT)** template issued by PfS.

The PITT process will enable the Local Authority to select a shortlist of 2 candidates from the 6 Panel members on the Framework.

2.4 Invitation to Tender

Following the shortlisting of the 2 Panel members, the Local Authority shall undertake a detailed Invitation to Tender (ITT) process. This is a detailed process in which the 2 shortlisted parties enter into a design competition using the brief that would have been produced by the design user group during the development of the OBC.

Local Authorities are advised to follow the guidance within the PfS guidance document **The Local Competition** as well as utilise the **Invitation to Tender (ITT)** template issued by PfS.

At the end of the ITT phase, the Local Authority will be in a position to select a Preferred Bidder for the OSP Project.

2.5 Preferred Bidder and FBC

Upon selection of the Preferred Bidder at the completion of the ITT process, the following is expected to take place:

- (a) The Preferred Bidder will be expected to develop their detailed designs further and apply for detailed planning permission;

- (b) The Local Authority, working closely with the Preferred Bidder, will be expected to produce a Final Business Case (FBC). PfS will issue specific guidance for this FBC at a later date;
- (c) The Local Authority and the Preferred Bidder will be expected to insert any project specific information into the Building Contract to be used. For the avoidance of doubt, the Building Contract is not open to negotiation and/or amendment. Any activity during this phase relates solely to inserting project specific data into the Building Contract.

Local Authorities are advised to follow the guidance within the PfS guidance document ***The Local Competition.***

3. INTERFACE WITH OTHER CONTRACTS

- 3.1 ICT equipment will be procured separately by the Local Authority delivering the OSP Project. The Preferred Bidder will be required to work closely with the preferred ICT equipment provider to ensure that the design of the building and ICT are closely integrated.
- 3.2 There may also need to be an interface with key facilities management providers, for example catering. The interface will be managed by the Local Authority, and the Preferred Bidder will need to work closely with the facilities management provider.

4. FURTHER ASSISTANCE

Authorities wishing to discuss the procurement framework with PfS should contact the Academies Director at Partnerships for Schools.

Authorities with queries relating to any other One School Pathfinder policy issues should contact the DCSF.