Property Data Survey Programme Bidders' Day:

Property Data Surveys and Asset Management Software

Wednesday 26 October.

Church House, Westminster

Introduction and Welcome

Anthony Walker, Programme Director

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Purpose of the day

Mike Coleman, Regional Operations Director

The Challenge

- We want to deliver the most accurate, consistent and comparable data set possible on the condition of the English schools estate
- We need to do so in a short timescale, using a demonstratively objective, transparent process
- We don't want to reinvent the wheel
- We don't have the resource to do this alone
- In short – we want and need your help!

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Purpose of the day

- To give you the opportunity to meet 'the client' face-to-face

- To explore the implications of the brief

- To be open and honest about the scale of the challenge

- To provide you with the information you need to respond to the OJEU with equal openness and honesty

- To listen to your queries, suggestions and concerns

- To persuade you to pursue a great opportunity

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Survey & Software Bidders Day

School Condition Survey

Mark Sarjant

26 October 2011

Department for Education

5th July 2010

- **Education Secretary sets out a complete overhaul of capital investment in England's schools.**

- **Was making tough, immediate decisions to help get the best value for money.**

- **The Government launching a Comprehensive Review of all capital investment in schools, early years, colleges and sixth forms. Led by Sebastian James, Group Operations Director of DSG international plc.**

- **The review will guide future spending decisions over the next Spending Review period (2011-12 to 2014-15). It will look at how best to meet parental demand; make current design and procurement cost-effective and efficient; and overhaul how capital is allocated and targeted.**

Department for
Education

Capital Review

Reported to Ministers on 8 April 2011 and came up with 16 recommendations.

The ones of interest today are that the Department:

- **Gathers all local condition data that currently exists, and implements a central condition database to manage this information.**

- **Carries out independent building condition surveys on a rolling 20% sample of the estate each year to provide a credible picture of investments needs, repeating this to develop a full picture of the estate's condition in five years and thereafter.**

Department for
Education

19th July 2011

- **Education Secretary commends the James Review to the House.**

- **Accepted the recommendation to conduct a full survey of the school estate which had stopped in 2005. This had made fair distribution of funding much harder.**

- **Since 19 July announcement Department has been asked to look at ways of collecting the initial condition information quicker rather than a 5 year period. "Why not one year".**

- **Working with PfS to set revised timeframe for collection of information. Looking to complete in 2013.**
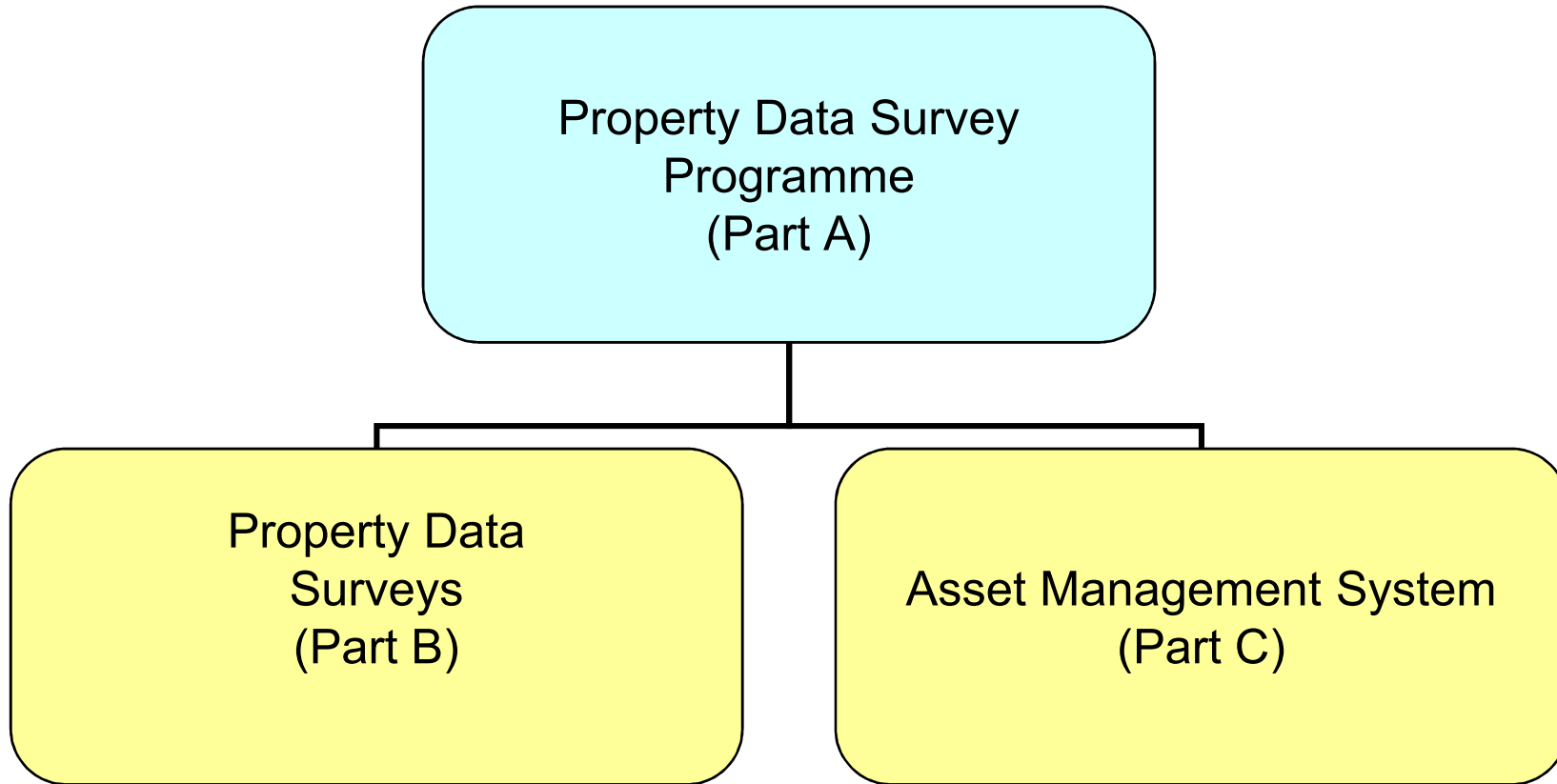
Department for
Education

What Happens Next

- Surveying more than 23,000 education buildings which is clearly a huge programme of work. Consider the use of some existing data held locally.

- Collating information and loading onto the central condition database.

- Exercise to be completed by July 2013.

- Data to be available in autumn 2013, which we would could use to calculate the 2014-15 capital funding allocations.

Department for
Education

Opportunity and Timescales

Anthony Walker, Programme Director

Opportunity

Property Data Survey Programme (Part A)

Property Data Surveys (Part B)

Asset Management System (Part C)

Opportunity – Key Deliverables, PDS

To procure and appoint surveyors who will:

- carry out the PDS across the whole of the schools estate - circa 23,000 establishments, expectation this will be circa 17,000 after validation of existing data;

- commence the survey programme in late March 2012 and complete by late July 2013;

- provide robust property data assessments and the associated costs;

- deliver a consistent high-quality and value for money survey programme, with minimum disruption to schools and their daily operations;

- maximise efficiency savings wherever possible.

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Opportunity – Optional Services, PDS

- **Sixth Form Colleges -** Successful bidders may be required to undertake property data surveys, or more detailed condition surveys (specification to be determined) on Sixth Form Colleges (93 in number).

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Opportunity – Key Deliverables, AMS

To procure an Asset Management Software System that will:

- hold the property data gathered from the surveys;

- be in place and operational to accept property data from late March 2012;

- provide clear outputs that will feed into and inform future DfE Capital Spending Review (CSR) settlements and local authority capital allocations;

- permit web-based portal access to property data to DfE, PfS/ EFA, local authorities and other Responsible Bodies, and schools to assist them with prioritising investment in maintenance and repairs;

- deliver streamlined and efficient programme processes to support the delivery of Property Data Surveys.

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Opportunity – Optional Services, AMS

- **Energy Consumption -** to hold and report data on Energy Consumption data, specifically Display Energy Certificates relating to annual consumption each year, measured in kwh/m2 year.

- **Statutory Testing -** to hold data of Statutory Testing and inspection renewal dates .

- **Suitability Data –** to import and hold suitability data for schools and other educational establishments.

- **Sixth Form Colleges –** hold survey data based on a different survey specification and clients' requirements.

- **New Build Cost Data -** hold data relating to new build cost rates per m2 and be able to calculate the total rebuild cost for schools with the ability to run data reports at local, regional and national level.

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Opportunity – Regional LOTS

LOT	Sub-Region
LOT 1	North West
LOT 2	North East
LOT 3	Yorkshire & the Humber
LOT 4	West Midlands
LOT 5	East Midlands
LOT 6	East of England
LOT 7	South West
LOT 8	South East
LOT 9	London

Opportunity

	LOT 1: North West	LOT 2: North East	LOT 3: Yorkshire and The Humber	LOT 4: West Midlands	LOT 5: East Midlands	LOT 6: East of England	LOT 7: London	LOT 8: South East	LOT 9: South West	TOTAL
16 Plus	4	4	6	8	5	3	5	8	15	58
Secondary	421	141	300	347	280	340	395	473	312	3,009
Middle Deemed Secondary	2	40	9	30	13	93	3	19	24	233
Middle Deemed Primary			1	5		2	29	8	15	60
Primary	2,470	889	1,826	1,789	1,647	2,020	1,762	2,621	1,879	16,903
Nursery	50	50	50	50	50	50	50	50	50	450
Other	289	103	165	221	147	180	304	320	174	1,903
Total Schools	3,236	1,227	2,357	2,400	2,092	2,638	2,496	3,449	2,419	22,616
Local Authorities	*23*	*12*	*15*	*14*	*9*	*11*	*33*	*19*	*16*	*152*

Timescales

Procurement Programme	AMS		PDS	
	Start	Finish	Start	Finish
Issue OJEU (Restricted Accelerated)	17 Oct 11	17 Oct 11	n/a	n/a
Issue OJEU (Restricted)	-	-	17 Oct 11	17 Oct 11
ITT Issue	14 Nov 11	14 Nov 11	29 Nov 11	29 Nov 11
ITT Period	14 Nov 11	28 Nov 11	29 Nov 11	04 Jan 12
Bidder Interviews	12 Dec 11	13 Dec 11	19 Jan 12	27 Jan 12
Contract Award	04 Jan 12	04 Jan 12	19 Feb 12	20 Feb 12
Develop AMS Platform & Test	04 Jan 12	13 Feb 12	n/a	n/a
AMS Platform Operational	n/a	13 Feb 12	n/a	n/a
Pilot, live testing and evaluation	21 Feb 12	16 Mar 12	21 Feb 12	16 Mar 12
Briefing/Training	n/a	n/a	19 Mar 12	30 Mar 12
Mobilisation	n/a	n/a	02 Apr 12	13 Apr 12
Survey Programme	n/a	n/a	16 Apr 12	26 Jul 13

Property Data Surveys (PDS)

Anthony Walker, Programme Director

Building Condition Surveys - Scope

- **Level of Data Recorded:** Provided detailed information on condition, on a wide range of elements and sub elements

- **Grading and Prioritising:** Recorded grade (e.g. A-D) and priorities (e.g.1-4)

- **Method of Assessment:** Used a comprehensive method of assessment involving extensive measurement

- **Cost Information:** Provided detailed cost information, with costs provided using the surveyors software

Property Data Surveys - Scope

- **Level of Data Recorded:** Provides high-level information on condition - similar elements, reduced sub-elements

- **Grading and Prioritising:** A-D and 1-4, AMS to generate numerical scores and RAG ratings

- **Method of Assessment:** High-level method of assessment requiring minimal measurement

- **Cost Information:** Provides high-level cost information, using a single cost model and minimal input from the surveyor

- **Validation of Existing Data:** Work with local authorities and schools to validate existing data where possible

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Validation of Existing Data

- James: Gather all local condition data that currently exists
- Circa 20-30% of existing local data up-to-date and accurate
- Robust validation process:
  - LAs provided with opportunity to submit existing data
  - LA compliance criteria – self assessment
  - Desktop compliance checks (PfS Data Evaluation Team)
  - Site Validation Surveys by surveyors (random sample of 5-10% of schools within each LA)
  - Surveys uploaded via web based portal
  - Automated conversion process (to PDS format)

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Costs: PDS v Full Condition Surveys

	Property Data Surveys	Full Condition Surveys
Nursery/PRU	£500 - £750	£1,000 – £5,000
Primary	£750 - £1,200	£2,000 - £7,000
Secondary	£2,000 - £3,300	£7,000 - £15,000

Note: Indicative costs based on market engagement

Asset Management Software (AMS)

Anthony Walker, Programme Director

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AMS: Project Scope

Database Functionality	• Input and Output Requirements
Data Characteristics	• Core and Optional Services
Access Requirements	• User Demands
Workflow Management	• Demands and Processes

Database Functionality

Input	Existing Data	PDS Data	Other Data
Manage	Hold	Secure	Provide Access
Output	Reports	Monitor Investment	Measure Impact
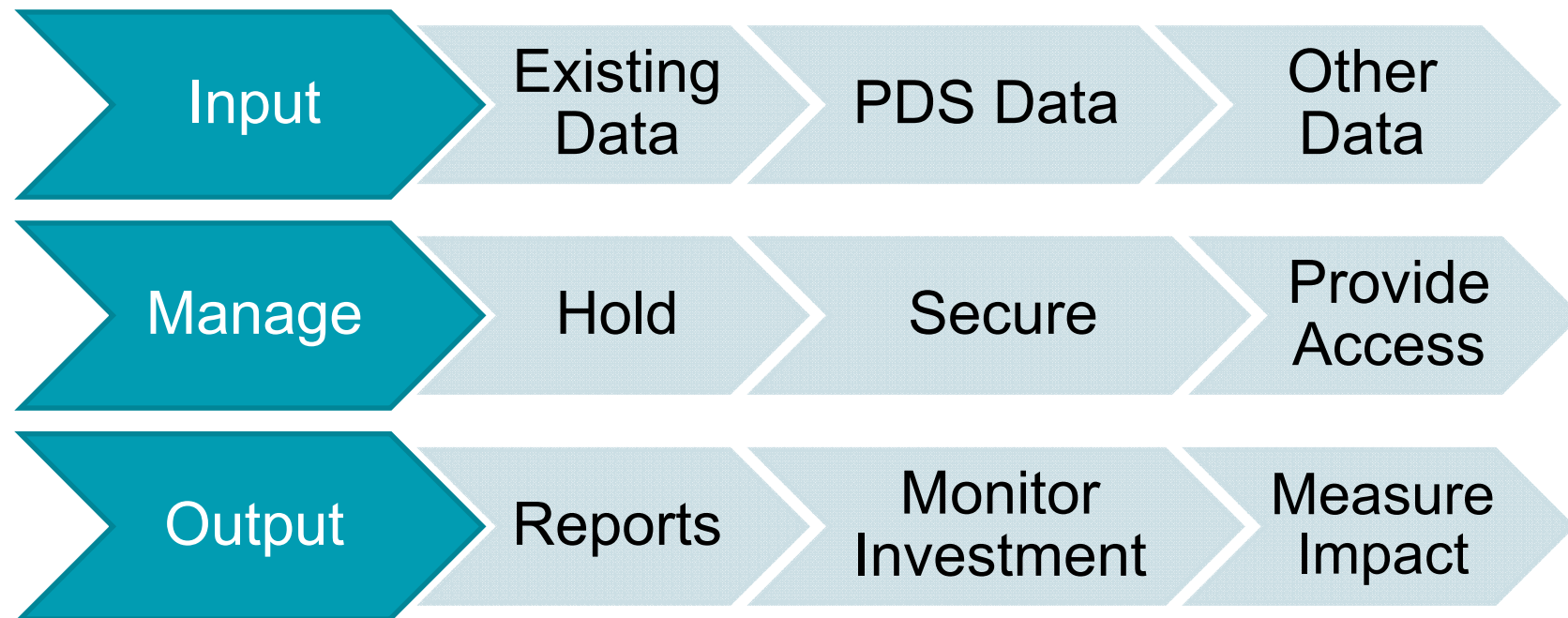
Data Characteristics – Key

- **Property Data Surveys:** Condition and priority grading of each element and sub-element to enable analysis of data at block, school, local authority, regional, and national level

  - **Condition:** A – Good, B – Satisfactory, C – Poor and D – Bad

  - **Priority:** 1 – Urgent, 2 – Essential, 3 – Desirable and 4 – Long term

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Data Characteristics - Optional Services

- **Suitability** - Information on the suitability of classrooms and buildings for the teaching of the curriculum
- **Statutory Testing** - school records on certification dates and expiry dates for the full range of statutory compliance testing items
- **Energy Consumption** – receive, store and report energy consumption data Display Energy Certificates
- **Sixth Form Colleges** – surveys on up to 93 colleges
- **New Build Cost Data** – record rebuilding cost data for each school

Access Requirements

- Web-based portal access for a diverse range of 'users':
  - Department for Education,
  - Partnerships for Schools (PfS)/Education Funding Agency (EFA),
  - Local authorities and other Responsible Bodies,
  - Schools and other Educational Establishments

- With differing access requirements and functionality:
  - Level
  - Time

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Workflow Management

- **Processes:**
  - Data validation
  - Programme order generation to surveyors
  - Invoice generation
  - Property data survey reporting
  - Report generation
- **Programme Management:**
  - Performance monitoring
  - Quality management
- **Contract Management and Reporting**
  - 'day-to-day' management

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Panel Question and Answers

Follow Up and Close

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http://www.partnershipsforschools.org.uk/programmes/property-data-survey-programme.html

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