



Infrastructure
and Projects
Authority

PPPs and Private Finance in the Education Sector – UK Experience

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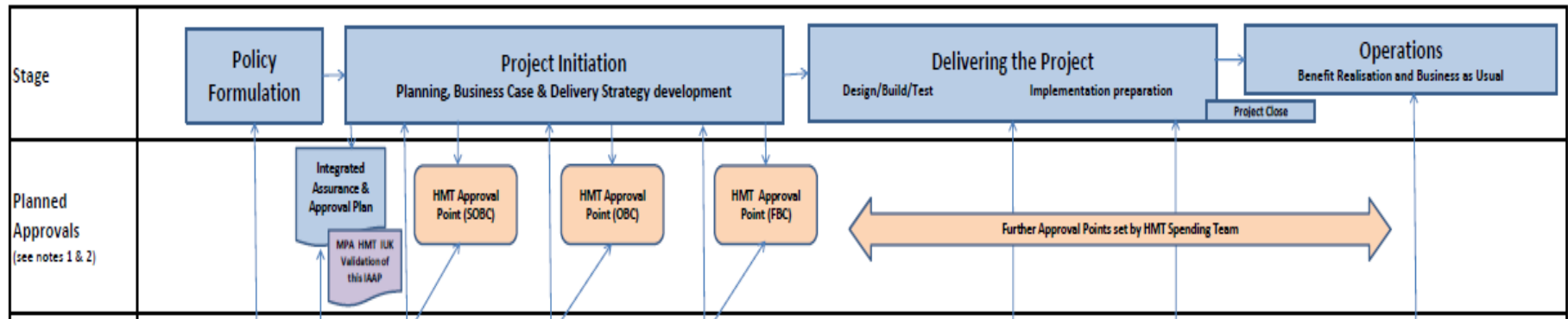
Contents

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- Pre-OJEU: What is it & How was it done?
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- How was it managed? – Spider or Conductor?
- Lessons Learned

Introduction & Aim

- Lots of advisors & Specialists.
- What happens before they are on Board.
- How did we start?
- What did we learn?
- Did it Work?
- Aim

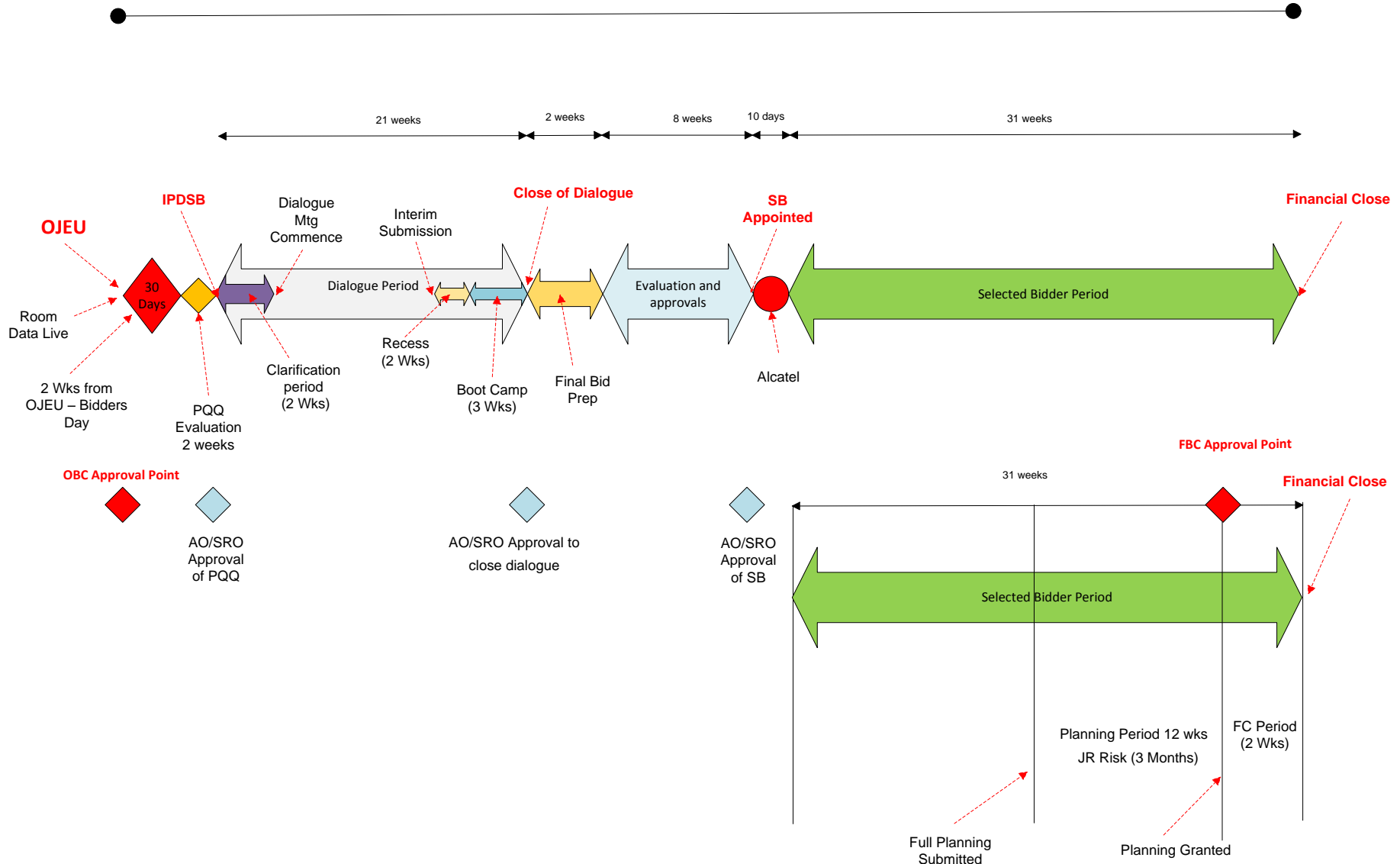
The Procurement Process



- Extract from; Integrated Assurance & Approvals – Project Lifespan.
- Lean Procurement.

The Procurement Process – Delivering the Project

Overall Period OJEU to FC – 18 Months (PF2 'Policy'/Lean Procurement)



Delivering the Project – Where you want to get to



The PPP Mind-set.

- Be clear in what you want.
- Be clear as to the standards you expect.
- Be clear who has responsibility for what.
- Highlight constraints, restrictions and conditions.
- Be clear as to how long you want the facility to last.
- Be clear as to how you want the facility managed.
- Think Long Term.
- Cause and Effect.
- Balanced against-----

The PPP mind-set – The Balance

- The Output nature of PPP.
- Encouraging innovation.
- The right parties owning and Managing Risk.
- Value for Money.

Be Clear in what you want.

Be Clear as to what Standards you expect.

How did we do this?

PSBP – What we told the Market

We're looking for well designed school buildings

With good specifications

Comfortable environments

Energy efficiency

Sufficient area for teaching learning and dining

Matching schools needs

Standardise and replicate what's good

Avoid variations

Emphasise specification over excess area

Measure comfort differently

Encourage energy savings

Minimum standard areas for spaces and overall areas

Using legacy FF&E and ICT

Baseline Designs – The Superblock



Overall GIFA

Ground: 4255m²
First: 2352m²
Second: 2253m²
Total: 8859m²

TARGET: 8810m²



Education Funding Agency
EFA Baseline School Designs

Secondary Type 2 1200 Ground Floor
11-16 Typical Curriculum

Scale: 1:200 at A1
Dwg. No.: 2.01.001



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Baseline Designs – The Finger Block



Baseline Designs – Primary School



GROUND FLOOR PLAN



Overall GIFA

Ground:	1248m
First:	932m ²
Second:	10m ²
<u>Total:</u>	<u>2190m</u>

TARGET: 2190m²

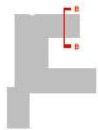
Education Funding Agency
EFA Baseline School Designs

Primary Type 2 420 + 26N 3-11
Standard Classroom Option

Scale: 1:200 at A3
Dwg. No.: 2.01.001

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Baseline Designs – Typical Secondary Curriculum



Education Funding Agency
EFA Baseline School Designs

Secondary Type 1 1200 Section BB
11-16 Typical Curriculum

Scale: N/A
Dwg. No.: 1.01.006


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Baseline Designs – Typical Primary School



3D LONG SECTION



3D CROSS SECTION

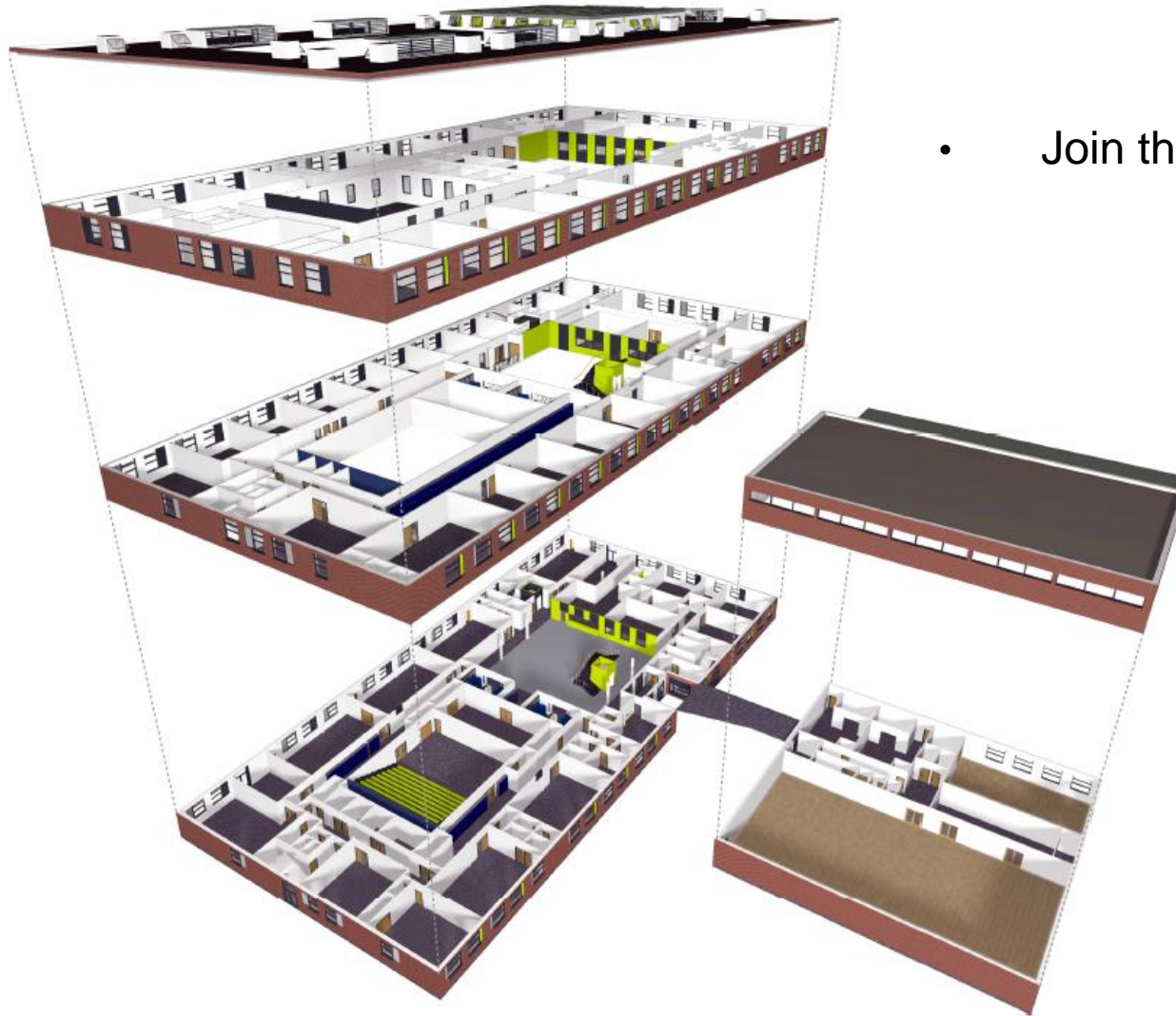


Education Funding Agency
EFA Baseline School Designs

Primary Type 2 420 + 26N 3-11
Large Classroom Option

Scale: 1:200 at A3
Dwg. No.: 2.02.005





- Join the Bits

The Control Option – Show the market

- What is a Control Option?
- How does this work?
- Site Surveys Instructed by Public Sector (some warranted)
- Title investigations & Issues Identified
- Fully Populated Data Room before Private Sector Engagement

Primary School - Existing



Primary School – Control Option



Secondary School - Existing



Secondary School – Control Option



Control Option – Did it Work?



PSBP Control Option

Contractor's proposal

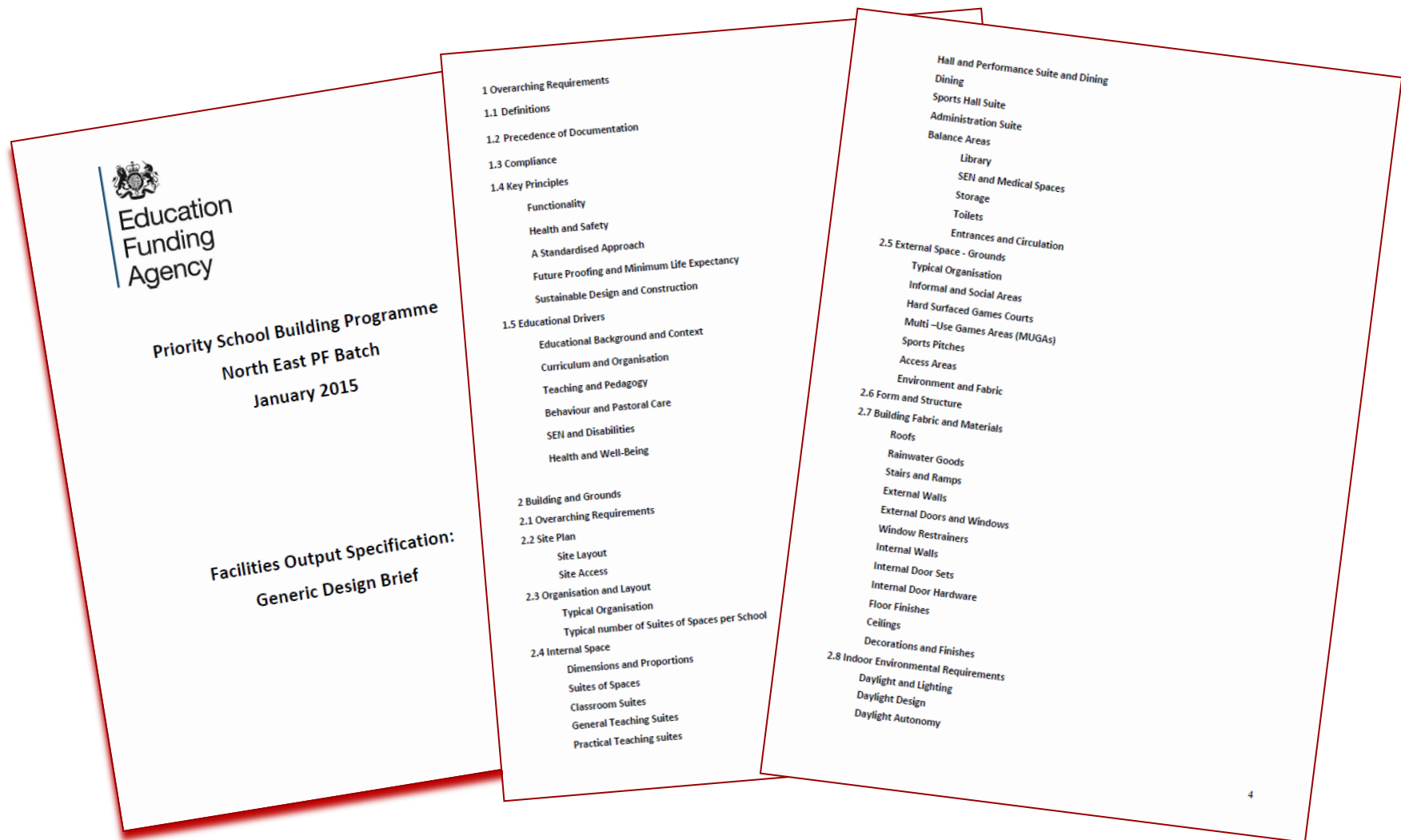


Standard Specifications

- Facilities Output Specification (FOS)
- Services Output Specification (SOS)

- School Specific Design Brief (Not Standard!)

Facilities Output Specification - FOS



Standard Specification - SOS



Services Output Specification	
1	Definitions and Status of this document
1.1	Definitions
1.2	Status of this document
1.3	Services Specification
1.4	School Responsibility
1.5	Compliance
1.6	Overarching Requirements (summary)
1.7	Management and Resourcing of the Services
1.8	Services Delivery Proposals
1.9	Contractor's Staff and Training and Development
1.10	Integration of the Services with School policies and operations
1.11	Quality Assurance
1.12	Health & Safety
1.13	Environmental Management Services
1.14	Design Integration
1.15	Interface Services and Individual Schools
1.16	Soft Landings
1.17	SEN and Disabilities
1.18	Specific SEN Requirements
2	Specific Services Requirements
2.1	Helpdesk
2.2	Supporting Documentation
2.3	Performance Monitoring, Reporting and Record Keeping
2.4	Interface Services
2.5	Access and Building Security
2.6	Asset Maintenance Service
2.7	Energy and Utilities Management Plan
2.8	Energy and Utilities Modelling and Payment
2.9	Elective Services
Annex 1:	PIU Targets
Annex 2:	Service Quality Standards
Appendix A:	Performance Standards
Appendix B:	Interface Issues and Responsibilities Matrix for Soft Services
Appendix C:	Statutory Inspection Testing and Maintenance Requirements
Appendix D:	Training Requirements
Appendix E:	Minimum Life and Residual Life Expectancy

2

The PPP Mind-set – Summary

Be clear in what you want.

Be clear as to the standards you expect.

Be clear who has responsibility for what.

Highlight constraints, restrictions and conditions.

Did we achieve this in the Schools Programme?

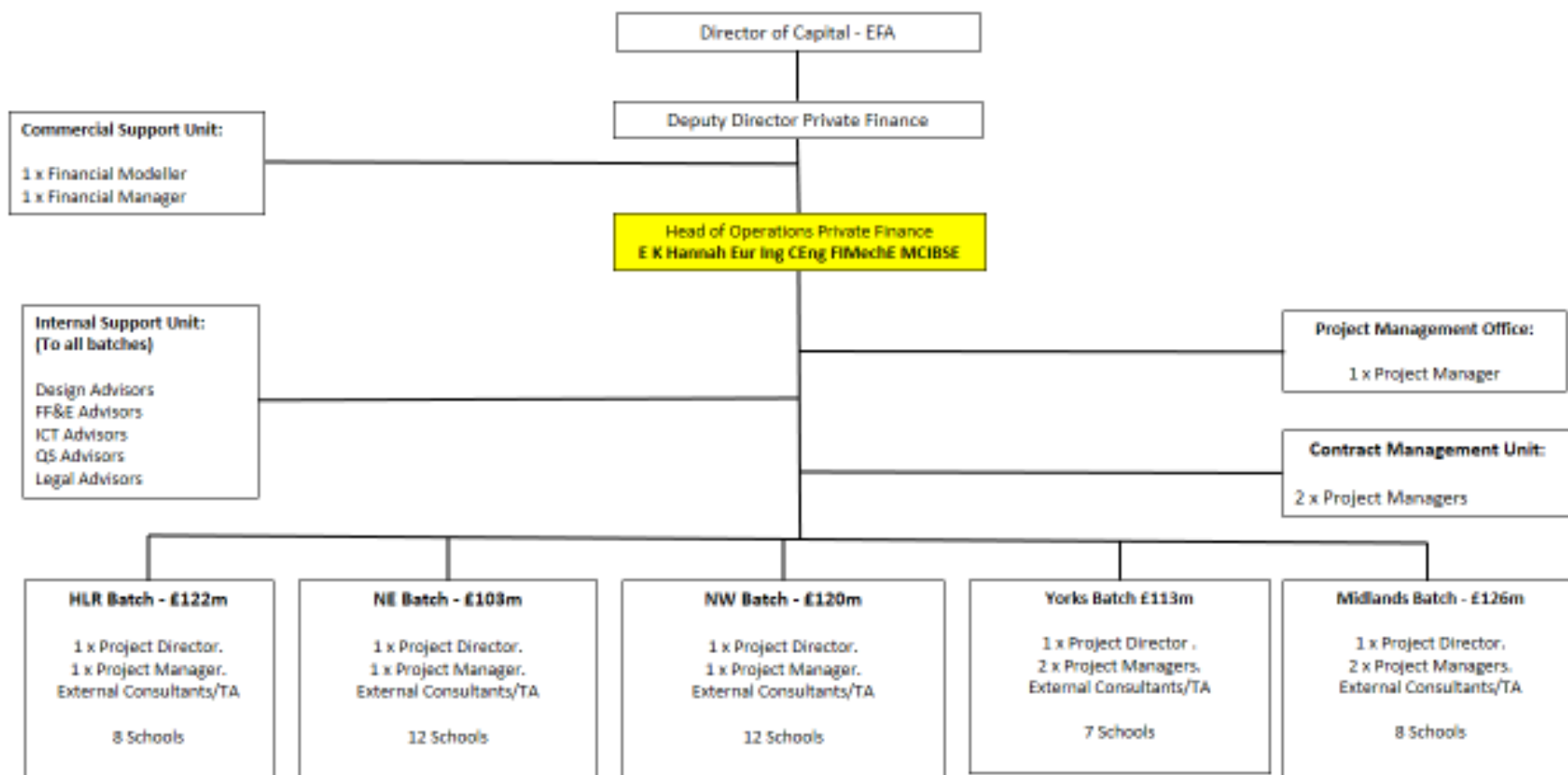
Yes

Spider or Conductor?



- PSBP Programme
- 46 School – Different Types
- Grouped into Batches
- Large Geographic Areas
- Management Challenge for the programme

Priority Schools Building Programme – Private Finance Team Structure (Procurement Phase)



Update

- All 5 nearing the end of the Construction Phase.
- 41 schools handed over and fully operational.
- Schools were very impressed by the rate of construction.
- Schools and Governors positively engaged with the process.
- Mobilisation working well.
- Minor changes on site.
- Operational Public Sector Team now operational.



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