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**MANAGING SCHOOLS
DURING
NEW BUILD PROJECTS**

**A Guide
for Principals**



CONTENTS

1.	INTRODUCTION	1
1.1	Background	1
1.2	Contents	1
2.	PLANNING and PREPARATION	2
2.1	Personnel Implications	2
2.2	Working Relationships	2
2.3	The Building	3
2.4	Learning and Teaching	3
2.5	Keeping Records	3
3.	DURING THE CONSTRUCTION PERIOD	4
3.1	Health and Safety	4
3.2	Site Meetings	4
3.3	Ongoing Communication	4
3.4	Links with Other Agencies	5
3.5	Initial Procurement Budget (IPB)	5
3.6	Furnishings	6
4.	ON COMPLETION AND HANDOVER	7
4.1	Taking possession	7
4.2	Moving in	7
5.	AFTER HANDOVER	8

1. INTRODUCTION

1.1 Background

This guidance on *Managing Schools during New Build Projects* has been developed as part of the Department of Education's review of the Building Handbook for Primary Schools. Whilst of general interest to project managers, architects and contractors, it is aimed primarily at school principals and management teams who are involved in new building projects. It refers to projects undertaken by conventional means only and does not apply to Public Private Partnership (PPP) schemes where slightly different arrangements are in place.

1.2 Contents

The guidance is in five parts:

Section 1 Introduction

Section 2 Planning and Preparation

Section 3 During the Construction Period

Section 4 On Completion and Handover

Section 5 After Handover

This guidance has been developed following consultation with a number of principals who have had recent experience of managing a major new building project. It covers the period from the appointment of the contractor through to the stage when the school takes ownership. It does not make reference to the design stage although, clearly, the school should be involved in all discussions in relation to the design.

2. PLANNING AND PREPARATION

2.1 Personnel Implications

Building projects are complex and can present many challenges for school management teams. In order to make it as smooth as possible, it is important to ensure that there is a single point of contact within the school for all matters in relation to the building project. In most cases this will be the Principal. He/she is the person with the most comprehensive knowledge of the school's immediate and future needs and who will be accepted as the authority on all aspects of school provision.

Whilst the management of the building project is of vital importance, the effective leadership and management of the school and the continued provision of quality learning and teaching, curriculum and staff development remain the key priorities. It may be possible to delegate some less important areas of responsibility to other staff, including, where possible, non-teaching staff. This is a decision for the Board of Governors of the school and may have implications for the school's budget. Regardless of the type of arrangement, it is essential that clear guidelines for responsibility are agreed.

To avoid confusion about responsibilities and communication within the school it is important that, according to school size, the school secretary or a small team of people are aware of the interim arrangements. It would also be helpful for the secretary to have a contact list of the key personnel in relation to the building project eg architect, project manager etc. This can facilitate exchange of information and save valuable time.

2.2 Working Relationships

It is important to develop good working relationships with key personnel such as the architect, project manager and clerk of works. The project manager is the vital link between the contractor, the architect and the Department of Education. He/she will support you throughout the project. The clerk of works will know the detail of everything which is happening on-site. He/she can anticipate difficulties, can help resolve issues at an early stage, can foresee decisions you will have to make and can often advise you on pertinent questions to ask. The architect, of course, is the person with whom you will work most closely in order to maximise the potential of the new build.

2.3 The Building

At the earliest possible stage undertake visits to other recent new builds, particularly those of similar size; talk to principals and key staff such as caretakers and clerical staff. At this initial stage you will be interested in the building layout and grounds. With the principal's permission, take photographs of features which are of particular interest to you. It is also a good idea to ask about what is not working well or if there is anything the Principal would change.

Arrange for some of the staff to visit schools also. It is best to be selective about which schools they visit and to choose those which provide the best design options for your situation.

Know exactly what you are entitled to in terms of accommodation. This will be detailed in the Schedule of Accommodation, but if you are unsure, ask the architect or project manager to clarify it for you. No question is too trivial.

Have a clear vision of the needs of the school now and in the future. In particular, careful consideration should be given to the IT infrastructure.

Think in terms of what is practical, functional and aesthetic. Consider the financial implications of future maintenance and recurrent costs.

2.4 Learning and Teaching

Consult with the teaching staff at a very early stage to consider how the building project might be most effectively used to support and enhance learning and teaching. It can provide very meaningful contexts for learning and teaching in literacy, numeracy and the world around us and is a really effective way of keeping others informed.

Consult with the children eg through the school council, about what they would like to know about the project.

2.5 Keeping Records

Set up a filing system for all correspondence and information in relation to the building project. It is often necessary to access information quickly so this will be time well spent. Keep a record of decisions made for future referral.

3. DURING THE CONSTRUCTION PERIOD

3.1 Health and Safety

If the new build site is close to the existing school it will be important to carry out regular risk assessments to ensure the health and safety of all school users. Risks to be considered might include access for site traffic, machinery and pedestrians.

It may also be necessary to consider alternative fire escape routes and meeting points. If this is the case, it will be important to carry out a number of fire drills in order to ensure that everyone is fully aware of the new arrangements.

In circumstances where the contractor's staff need to gain access to the building site through parts of the school it may be necessary for them to wear an agreed form of identification. At all times it will be important to ensure that you are complying with the Department of Education Circulars relating to child protection and vetting.

When visiting the site, it is essential to adhere strictly to the health and safety procedures.

3.2 Site Meetings

Site meetings are useful though not always of immediate relevance to you. However, if at all possible you should attend. It is an opportunity for you to bring issues to the table. All the key people will be present so queries can be resolved quickly.

Be clear about what you need in the building and be prepared to make a case for it.

If you are unable to attend a site meeting, ask for the Project Manager to keep you informed orally and request a copy of the minutes of the meeting.

3.3 Ongoing Communication

Ensure effective ongoing communication with the architect, project manager and clerk of works. If you have a query or need to know something, do not wait until the next site meeting; make contact with one of these key people.

Keep parents and the local school community informed of the project and how it is progressing. After an initial information meeting, this may be done through the school's newsletter to parents, through the school's website or the local press. Apart from the positive effect on community morale and ownership, it will help to explain any changes to school routines and organisation which may become necessary.

Revisit schools at various stages throughout the project as you begin to focus on finishes and equipment. It is also advisable to record the names of suppliers which schools have used for items outside the main contractors remit.

Visit the site regularly and make arrangements for all staff to visit. The closer the building comes to completion, the more often you will need to be there. At this stage a lot happens very quickly and you will want to ensure that it is exactly as you expect it to be. If you see something which you think may need to be changed speak to someone immediately.

Continued effective communication with **all** staff is essential throughout this stage in order to ensure that it is, as far as possible, an inclusive process.

3.4 Links with Other Agencies

Establish links with personnel who have responsibility for school libraries and computer systems. They will provide you with crucial information, guidance and advice which will help you plan for provision in the new building. It is also advisable to keep in close contact with the School Meals Service. Although the kitchen and dining facilities are not strictly your responsibility, it is important that you know what is happening and who to contact if there are any difficulties.

3.5 Initial Procurement Budget (IPB)

Build good working relationships with the Procurement Officer (PO) in the Education and Library Board/ESA and the officer assigned to your project. Get them to explain carefully how the schedule of recommended suppliers operates.

Set up rigorous accounting procedures for the IPB. Know the exact amount available and keep an account of all expenditure. You will

be provided with a regular statement but it will not take account of the most recent debits.

Find out from the PO the period within which the total procurement budget needs to be spent. Buy the essentials for furnishing classrooms and running the school and then take time to consider what you really need or what would be particularly useful in supporting learning and teaching.

Be aware that the PO may change an order if a similar product can be purchased at a lower price elsewhere.

3.6 Furnishings

Visit suppliers for school furniture or arrange for them to make professional presentations regarding their products, services and after sales support. Ask them to provide samples of furniture so that other members of staff can view it.

Make contact with other schools which these suppliers have furnished in order to confirm the quality and effectiveness of their service.

Decide on one main supplier. It is much easier to keep a track of orders and deliveries if you are only dealing with one company.

Start to plan how you, as a staff, want classrooms to look when complete; decide on which furniture you want and how much of it you will need to get you started. Be aware that non-fixed or mobile furniture allows for greater flexibility of room lay-out.

It may be tempting to transfer some of the furnishings from the existing building but, generally speaking, it never looks as new as you might initially think and in some instances will look decidedly out of place.

In deciding on the disposal of unwanted furniture or equipment, you should consult with the PO. Be aware that the commercial disposal of obsolete items can be very costly.

Finally, make sure you order essential furniture in good time to arrive for moving in.

4. ON COMPLETION AND HANDOVER

4.1 Taking possession

Go through the building with the clerk of works prior to handover to ensure that all aspects of the building are of a high standard. If there is anything with which you are not content, do not accept the handover.

You will receive a set of files containing information on all aspects of the building including drawings, health and safety, maintenance and mechanical services. Ensure that the project manager explains the contents of these files as you will need to refer to them in the future for service, maintenance and replacement of items.

Meet with the appropriate sub-contractors before handover in order to clarify all operational procedures eg alarm system, door access, phone systems, sound systems heating etc. Involve other members of staff, particularly the caretaker, so that the information is shared. Arrange for additional training sessions as necessary until you feel confident enough to manage the building.

Make a note of who to contact in the event of any query or difficulty.

4.2 Moving in

In new-build projects, the move into the new building can present quite a challenge. It is important to plan for it carefully and for the arrangements to be flexible enough to facilitate unforeseen hitches. In most instances schools are given one or two additional days to manage the packing and unpacking of resources. For authorisation to take these days you should contact the Curriculum Support Team at the Department of Education.

The actual moving of items will be carried out by a removal company. The Procurement Officer will advise you of approved removal companies but be sure to seek a quotation as the removal costs will be taken from the initial procurement budget.

Introducing the children to the new building requires careful planning and may need to be staggered over the course of a whole school day.

5. AFTER HANDOVER

Continue to attend the site meetings. It is your opportunity to provide input on how the building is 'performing' and to address any issues which may arise.

Inform the project manager about all snags or defects as they arise. Keep a record of when they were reported, who they were reported to, when they were dealt with and by whom. In this way you will be able to track progress and to identify recurring faults.

The defect period will last for one year after handover during which time the defects will be fixed within the terms of the building contract. After that period they become issues for school maintenance.

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