

Project Expiry

Case Study: Tendring Schools

February 2022

Summary

In 2019 the PFI project company completed the process of handing back to Authority control 12 primary schools in Essex covering over 2,500 pupils.

The PFI consortium had been responsible for the maintenance and lifecycle obligations of the facilities as well as the provision of caretaking, cleaning and grounds maintenance services.



There were limited provisions in the contract for the requirements around the process of returning to Authority control and the parties involved needed to agree a protocol for how this would happen in practice.

Vercity's Involvement

Vercity was the provider of management services to the PFI Project Company and was heavily involved through the process of handing over the facilities.



All parties involved in the project needed to deploy additional resource to manage a smooth transition out of the PFI arrangements. For the Project Company this was a multi-disciplinary team including asset management expertise to ensure that all stakeholders were sharing accurate information.

Protocols were agreed for various items, including how to manage open helpdesk tasks at the handover date which was linked to the reporting and invoicing of the final part-month.

Understanding and Surveying the Estate

Before the 13 schools could be handed back to the Authority condition surveys had to be undertaken to confirm that the estate had been properly maintained.

The estate included a mixture of schools with the oldest dating to 1863, having been extended in the 1960s and then refurbished and further extended as part of the PFI project.



A specialist surveying practice were engaged to undertake surveying work across the varied estate and report their findings to the project parties.

Original Construction	Schools
2000 – 2005 (PFI New Build)	4
1980 – 1999 (PFI Refurbished & Extended)	2
1960 – 1979 (PFI Refurbished & Extended)	1
1900 – 1959 (PFI Refurbished & Extended)	2
1860 – 1899 (PFI Refurbished & Extended)	3

There was a transparent sharing of the findings identified and a process embarked to agree any areas where work would be required to ensure that the contract requirements could be met.

Transition Arrangements

As part of the handover there were staff eligible for TUPE and there was some coordination required between the parties to confirm an agreed position. Reassuring the staff impacted required all parties involved to give clear and consistent message and it was important not to forget the human aspect of the change.

To support the transition the PFI Project Company deployed specialist resource to manage the handover of project data, including statutory inspections and maintenance records.

Establishing the protocols for the transition and then ensuring it was delivered without impacting the education of over 2,500 children attending the schools was a big job that needed all parties communicating and coordinating. Having the right support in place focussing on the transition process was critical to achieving that.

Key Learnings

1	Clarify contractual position and agree protocols
2	Ensure understanding of the estate
3	Deploy specialist support for survey scoping, management and delivery
4	Resource the data and information transfer
5	Communication with all stakeholders (including staff impacted)

Summary

Very few of those involved had been through a PFI project handover previously. We soon discovered that there was a significant amount of work involved in completing the transition out of the PFI contract and to the new arrangements for service provision!

All parties needed to put additional support in place to manage the process and ensure that the schools continued to receive services right up to the handover date.

Making the process successful involved close liaison between all parties, and an open approach to addressing both the contractual and the practical parts of the transition to new arrangements.

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