



**PUBLIC ART AND BUILDING SCHOOLS FOR THE FUTURE (BSF)
REVIEW AND GUIDANCE**

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ABOUT IXIA

ixia is the think tank for public art practice. Its aim is to provide an independent and objective view of the factors that affect the quality of artists' work in the public realm by undertaking research and enabling debate.

ixia works with artists, policy makers and delivery organisations within the public and private sectors.

ixia's approach is collaborative ensuring that partners inform its work.

ixia transfers knowledge and information through publications, consultancy, conferences and training.

ixia is a charity and regularly funded organisation of Arts Council England (ACE).

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EXECUTIVE SUMMARY

The government states that Building Schools for the Future (BSF) is the biggest single investment in improving school buildings for over fifty years. It intends to rebuild or refurbish every secondary school in England – transforming education through the creation of inspirational learning environments. Moreover, the government intends BSF to play a significant role in local regeneration initiatives and, in light of the current recession, the national economic recovery, by stimulating investment and supporting the construction industry.

ixia's review has been conducted in response to the growing number of public art commissions within BSF programmes and recent changes to national BSF guidance documents. It is now a requirement that every local authority sets up a mandatory Cultural Stakeholder Group (CSG) to champion the arts, culture and cultural learning within its BSF programme. The CSG's work includes advising on the provision of arts spaces within BSF schools and undertaking a Strategic and Facilities Audit in order to assess and develop links between BSF and existing and emerging arts and cultural organisations and initiatives. As a result, the role that public art can perform within BSF is highlighted and promoted.

This review is aimed at all those involved in the delivery of BSF schools and public art commissioning. It focuses on the current relationship between public art and BSF and its findings have been used to provide guidance on the engagement of artists within BSF programmes. It identifies that:

- there is a growing evidence base advocating public art and an increasing number of advisory organisations supporting public art are involved in the BSF process;
- there are increasing opportunities for public art commissions to happen as part of BSF programmes, but their impact can be limited by narrow definitions and restrictive practice;
- vision, policy, strategy and expertise (artists, local authority public art officers, public art consultants, public art organisations) in public art are key strategic success factors;
- a consistent set of good practice principles for public art needs to be developed and consistently applied;
- early and ongoing engagement of artists and public art expertise within the BSF process needs to be facilitated.

ixia has conducted this review in discussion with artists; local authority public art, arts and BSF officers; public art consultants and arts and public art organisations; architects and other consultants and advisors to BSF programmes; Arts Council England (ACE); Partnerships for Schools (Pfs); and Private Sector Partners (PSPs).

The review acknowledges that the BSF process is subject to continuous change and is being affected by the current economic downturn. It does not include the government's Academies programme or the emerging Primary Capital Programme (PCP) but the recommendations it contains should be applied to these and any other similar initiatives. ixia will continue to monitor the development of these programmes in light of producing future advice.

1. INTRODUCTION

The government states that BSF is the largest single capital investment programme in schools in England in fifty years.¹ It relies on partnerships between the public and private sectors and aims to rebuild or refurbish all of England's three thousand five hundred state secondary schools where there is need by 2023. It is envisaged not just as a school buildings programme but hopes to achieve a wider educational transformation effect, engaging and inspiring teachers, pupils and communities through the union of new/refurbished buildings with new technologies and creating the environment for the government's agenda of educational transformation. As a result, the government has declared that *'Building Schools for the Future (BSF) provides a unique opportunity to ensure that schools across the country are fully equipped to reflect and develop further the vibrant arts opportunities available for students and communities.'*²

Partnerships for Schools (PfS) is the government agency charged with delivering BSF. It works alongside local authorities, advising them on the development of a vision of improvements to their school buildings; assisting in allocating them a 'Wave'³ in which they join the BSF process; supporting them with the selection of a PSP; and approving and releasing government funding to enable a Local Education Partnership (LEP) – involving a local authority, PfS and a PSP – to deliver physical and educational improvements to schools.

The number of schools involved in BSF varies between local authorities, from three to twenty-four per Wave.⁴ For a local authority such as Birmingham City Council, which requires the redevelopment of a total of eighty-nine schools,⁵ a LEP will implement the BSF programme over a number of Waves. Schools with most academic and social need are prioritised. The first two schools to be developed by a LEP are known as sample schools. These are selected as representing the design and costs of all the schools that the LEP will be required to deliver. The sample schools play a significant role in the process of evaluating the bids made by potential PSPs. They provide potential PSPs with the opportunity to competitively demonstrate that they possess the skills and resources necessary for delivering a BSF programme. The sample schools are normally a new school and the refurbishment of an existing school using Private Finance Initiative (PFI) and Design and Build (D&B) contracts. The sample schools, and subsequently the non-sample schools, are built by the LEP on behalf of a local authority in phases and within a ten-year period.⁶

Government funding for BSF schools takes the form of capital grants and PFI credits. Capital grants are used to fund Information and Communication Technology (ICT) and the design and construction costs of schools via D&B contracts. PFI credits are paid to the local authority to employ a PSP to manage and maintain schools. The cost of designing and constructing these buildings is funded by the PSP as a partner in a LEP.

¹ www.partnershipsforschools.org.uk/about/aboutbsf.jsp

² *Creative Partnerships and the Curriculum: Eleventh Report of Session 2006–07: Report, together with formal minutes, oral and written evidence*, House of Commons Education and Skills Committee, 24 October 2007, p.40

³ For further information about Waves please refer to the Glossary. Information about which Wave a local authority belongs to can be found at: <http://www.partnershipsforschools.org.uk/programme/progress.jsp>. It has recently been announced that PfS is moving away from a Wave-based approach, and will instead be adopting a series of rolling starts.

⁴ www.partnershipsforschools.org.uk/programme/progress.jsp

⁵ www.birmingham.gov.uk/GenerateContent?CONTENT_ITEM_ID=149822&CONTENT_ITEM_TYPE=9&MENU_ID=276

⁶ In Waves 1-3, the bidding teams had to design several schools within a BSF Wave. However, in order to save time and to reduce the procurement costs for both the bidders and the clients, the local authority now selects two sample schools.

PfS is also now responsible for delivery of the PCP⁷ and the Academies Programme in order to align and integrate investment into the wider BSF programme.⁸ ixia will continue to monitor the development of these programmes in light of producing future advice.

PfS has recently announced that every local authority must set up a mandatory CSG to champion the arts, culture and cultural learning within its BSF programme. The CSG's work includes advising on the provision of arts spaces within BSF schools and undertaking a Strategic and Facilities Audit in order to assess and develop links between BSF and existing and emerging arts and cultural organisations and initiatives. As a result, PfS' BSF guidance for local authorities underlines, in general, the role public art can play within BSF, advocating that the CSG should make connections with their local authority's public art policy and fully explore the roles that public art can play within schools.⁹ This, and knowledge of the BSF programmes that have included public art, prompted ixia to produce this document.

For the purpose of this document, ixia defines public art as the process of artists engaging with the public realm. Within the context of BSF, public art includes artists' involvement in the provision of buildings and spaces and supporting the learning and community activities of schools, utilising the National Curriculum, ICT and the characteristics of the location of the school. The public artworks produced can be object- or process-based and either permanent or temporary.

This document is aimed at all those involved in BSF programmes, including: artists; local authority public art and arts officers; BSF Project Boards and Teams; CSGs; bidding and selected PSPs; LEPs; public art consultants and arts and public art organisations; PfS; and ACE and their specialist officers.

The document aims to equip readers with accurate information about public art and BSF. Section 2 sets out the findings of a review of current policy and practice. Section 3 offers guidance on how to create opportunities for public art within BSF.

⁷ http://www.partnershipsforschools.org.uk/media/press/pr_2009-06-16-DCSF_transition.jsp

⁸ Delivery of the Academies Programme was allocated to PfS by the Department for Children, Schools and Families (DCSF) in March 2006. <http://www.partnershipsforschools.org.uk/about/aboutacademies.jsp>. For further information about Academies please refer to the Glossary.

⁹ In July 2009 PfS published a new guidance document: *Requirements and guidance on culture for local authorities entering the second half of the Building Schools for the Future programme*, Partnerships for Schools (PfS), July 2009.

Summary of Key Acronyms:

ACE	Arts Council England
BSF	Building Schools for the Future
CCE	Creativity, Culture and Education
CP	Creative Partnerships
CSG	Cultural Stakeholder Group
D&B	Design & Build
DCSF	Department for Children, Schools and Families, The
DfES	Department for Education and Skills, The
DQIfS	Design Quality Indicator for Schools
FM	Facilities Management
FSOS	Facilities and Services Output Specification
ICTOS	Information and Communication Technology Output Specification
IPD	Invitation to Participate in Dialogue
LEP	Local Education Partnership
OBC	Outline Business Case
PfS	Partnerships for Schools
PFI	Private Finance Initiative
PSP	Private Sector Partner
SfC	Strategy for Change
SPA	Strategic Partnering Agreement

2. A REVIEW OF PUBLIC ART AND THE BSF PROCESS

2.1 Review Process

The review was led by ixia in discussion with artists; local authority public art, arts and BSF officers; public art consultants and arts and public art organisations; architects and other consultants and advisors to BSF programmes; ACE; PfS; and PSPs. The work included detailed desk research, encompassing both web and print publications, meetings with individuals and group discussions.

The review included three areas of activity:

- i. Consideration of the current guidance and thinking on the education sector and public art commissioning given by national and regional organisations, and on current practice as shown by recent projects and literature in the public art sector;
- ii. Consideration of the documents and national advice and guidance given to local authorities and the BSF team regarding the BSF process;
- iii. Consultation, discussion and debate with key individuals with a knowledge of public art, art in the education sector and those with practical experience working on BSF projects throughout England.

2.2 Reasons for the Review

A number of factors have contributed to the need for this review:

- i. PfS now requires that every local authority sets up a mandatory CSG to champion the arts, culture and cultural learning within its BSF programme. The CSG's work includes advising on the provision of arts spaces within BSF schools and undertaking a Strategic and Facilities Audit in order to assess and develop links between BSF and existing and emerging arts and cultural organisations and initiatives.¹⁰ As a result, the role that public art can play within BSF has been acknowledged by PfS in its guidance documents;¹¹
- ii. The application of public art policies and strategies to BSF programmes by local authorities, either via internal agreements or the local planning system;¹²
- iii. Public art commissions by the education sector are increasing. Through the work of organisations such as Creativity, Culture and Education (CCE), artists are being invited into the school environment as educators and facilitators who have an impact on the school curriculum. They are also being invited to work on the school design/environment, collaborating with architects and playing an active role in physical elements and the design process;
- iv. There is an absence of national guidelines regarding public art and the BSF process, offering advice on the role public art and artists can play in the provision of new schools;

¹⁰ *Requirements and guidance on culture for local authorities entering the second half of the Building Schools for the Future programme*, Partnerships for Schools (PfS), July 2009

¹¹ The role public art can play is referenced in PfS' Strategy for Change (SfC) guidance documents.

¹² For further information, please visit: <http://www.ixia-info.com/qc-advice-2009-public-art-and-the-planning-system/>

- v. Review and evaluation of public art initiatives (e.g. PROJECT¹³) has provided up-to-date guidance on good practice for public art.¹⁴

2.3 Review Findings

The review identifies a growing evidence of support for public art, but reveals the impact public art can have is often limited by narrow definitions and restrictive practice. It discerns the importance of a strategic vision, policy and strategy for public art and the use of public art expertise as key success factors and acknowledges the need for the evolution of a consistent set of good practice principles.

A number of distinct issues were identified which can be grouped under the following headings: *Policy and Evidence*; *Current and Future Practice*; and *Uncertainty*.

Policy and Evidence

- There is support and advocacy for public art commissioning in mandatory and strategic documents relating to BSF.
- There are a number of organisations involved in the BSF process which support public art.
- There are a number of local authorities commissioning public art as part of the BSF process.
- There is an increasing body of evidence and research that supports the instrumental value of artists' involvement in education.

Current and Future Practice

- Growth in support does not necessarily ensure innovative approaches.
- Practice varies and can be restrictive.
- A vision, policy and strategy for public art are extremely important.
- Current thinking and recent research projects have shown a consistent set of good practice principles.
- The development and implementation of a vision, policy, strategy and good practice for public art within the context of BSF requires time and the involvement of public art expertise.
- In addition to public art commissioning being achieved through the BSF process, it can also be supported via other routes within the activities of local authorities and their partners.

¹³ PROJECT was a public art initiative that ran from 2004 to 2006, supported by the Commission for Architecture and the Built Environment (CABE) and Arts & Business (A&B), managed by Public Art South West and evaluated by Comedia in 2006. Go to www.publicartonline.org.uk for further details. *Artists & Places: Engaging creative minds in regeneration*, Eric Holding (ed), Commission for Architecture and the Built Environment (CABE) and Arts & Business (A&B), 2008, was written to present a reflection on both the process and the outcomes of the PROJECT initiative and in order to introduce its successor, *Artists & Places*. It is intended to be a starting point for those within the development industry who want to understand and achieve the added value of adopting a cultural approach.

¹⁴ *Artists & Places* and *PROJECT: Evaluation Report*, Comedia, Public Art South West, 2006

Uncertainty

- BSF is subject to continuous review, resulting in change and uncertainty. Its delivery is being affected by the current economic downturn.

2.3.1 There is support and advocacy for public art commissioning in mandatory and strategic documents relating to BSF. This includes the involvement of artists in both school design as well as learning and community initiatives:

- *The Children's Plan*, published by the Department for Children, Schools and Families (DCSF) in December 2007, refers to 'cultural activity' which 'enriches lives and contributes to all five of the Every Child Matters outcomes'.¹⁵ The DCSF wants to 'work towards a position where no matter where they live, or what their background, all children and young people have the opportunities to get involved in top quality cultural opportunities in and out of school'.¹⁶ In February 2008, the government announced that all school children should be offered a minimum of five hours of high quality culture a week, a commitment set out in *The Children's Plan*.¹⁷ A £25 million *Find Your Talent* scheme, managed by CCE, is currently being piloted in ten pathfinder areas across England and is seeking to 'encourage young people to participate in cultural activities', offering them regular access to and involvement with arts and culture, both in and out of school.¹⁸ The involvement of artists within BSF programmes provides an opportunity to support the aims and objectives of *The Children's Plan*, *Every Child Matters* and *Find Your Talent*;
- In addition, *The Children's Plan* places new emphasis on schools as educational and social spaces for the wider community, supporting the government's *Extended Schools: Building on Experience* agenda.¹⁹ BSF's aim is to provide schools that are designed to support new ways of teaching and learning, with additional focus on: personalised learning; workforce reform; provision of ICT; and wider community use of school buildings. This includes supporting local regeneration and encourages joined-up investment and the co-location of services, including libraries and health, arts and sports facilities.²⁰ Artists can provide innovative approaches to design and use, which are recognised as being vital to delivering schools which are able to meet these shifting demands, and to ensure that these elements support educational and community initiatives;
- PfS is the government agency responsible for delivering BSF and the templates and documents it has developed to deliver BSF make reference to public art. Its 2009 guidance, for local authorities in Waves 7-9 developing their Strategies for Change (SfCs), advocates that they should: 'provide a strategic overview of how the BSF investment programme links with public art policy'.²¹ In addition, it recommends local authorities: 'ensure that they have fully explored the possibility of including plans for public art and partnerships

¹⁵ *The Children's Plan: Building brighter futures*, Department for Children, Schools and Families (DCSF), TSO (The Stationary Office), December 2007, p.130

¹⁶ *The Children's Plan*, p.130

¹⁷ *The Children's Plan* states the government's ambition to 'work towards a five hour offer to match that for sport. The aim will be to give young people the chance to develop as: informed spectators ... and participants and creators.' *The Children's Plan*, p.130

¹⁸ <http://www.findyourtalent.org/>

¹⁹ *The Children's Plan and Extended Schools: Building on Experience*, Department for Children, Schools and Families (DCSF), 2007

²⁰ *BSF as a Catalyst for Regeneration*, James Bowyer, EC Harris Built Asset Consultancy Expert View – Education & Children's Services, December 2008

²¹ *Strategy for Change: Guidance for Local Authorities in BSF Wave 7-9*, Partnerships for Schools (PfS) and Department for Children, Schools and Families (DCSF), May 2009, p.18

*with artists within their proposals.*²² Furthermore, within its general guidance PfS acknowledges the contribution that artists can make to the design and use of buildings and the learning and community activities that take place within them;²³

- The planning and provision for culture and cultural learning is a formal and mandatory part of BSF which must be researched and planned for by local authorities and schools from BSF Wave 7 onwards.²⁴ Every local authority must set up a CSG, ‘a requirement of entry to the programme’,²⁵ to champion the role of culture within educational transformation. The CSG should be formed and begin its work at the Pre-Initiation stage – ‘as early as possible in order to maximise its value’²⁶ – and it is required to be established and working by the Readiness to Deliver (RtD) and Strategy for Change (SfC) stage. PfS recommends that the CSG is led by a Culture Workstream Lead and includes ‘a range of individuals with a strategic, local authority-wide overview across a range of areas from culture and the arts to children’s services and community delivery.’²⁷ PfS also suggests that arts and cultural organisations can inform the work of the CSG.²⁸ Initially, the CSG’s role is to advise the BSF Project Board and Team, and subsequently the LEP, to ensure that the arts, culture and cultural learning are integrated within the BSF programme. The CSG’s work includes advising on the provision of arts spaces within BSF schools and undertaking a Strategic and Facilities Audit in order to assess and develop links between BSF and existing and emerging arts and cultural organisations and initiatives.²⁹ With regard to public art, PfS recommends that the CSG should: ‘explore opportunities for artists to be involved in the design process and for public art to be incorporated in plans’ (including ICT).³⁰ It states that artists can: facilitate learner and community input into the briefing and design process; integrate public art into the Facilities and Services Output Specification (FSOS) requirements; and contribute to the design process alongside other design professionals in the bidding teams;³¹
- *Building Bulletin 98: Briefing Framework for Secondary School Projects (BB98)* and *Building Bulletin 77: Designing for Pupils with Special Educational Needs and Disabilities in School (BB77)* set out area guidelines for secondary school buildings and grounds and include guidance on how schools and local authorities should develop the brief for any secondary school and the design criteria that must be considered. Artists can play a vital role in influencing these. *BB98* refers to ‘vision’ as a key design criterion and states that buildings should inspire and enhance educational performance,

²² *Strategy for Change*, p.45

²³ PfS website: ‘BSF provides opportunities for schools and local authorities to forge new partnerships with cultural organisations or strengthen existing ones. Cultural practitioners such as artists, musicians, archivists and librarians can make a valuable contribution to the learning workforce.’ <http://www.partnershipsforschools.org.uk/>

²⁴ *Requirements and guidance on culture*, July 2009

²⁵ *Readiness to Deliver: Guidance for Local Authorities in BSF Waves 7 and beyond*, Partnerships for Schools (PfS) and Department for Children, Schools and Families (DCSF), February 2009, p.20

²⁶ *Requirements and guidance on culture*, p.21

²⁷ *Requirements and guidance on culture*, p.24

²⁸ *Requirements and guidance on culture*, p.24

²⁹ *Requirements and guidance on culture*, pp.27-28

³⁰ *Requirements and guidance on culture*, p.11 and p.13

³¹ *Requirements and guidance on culture*, p.13

staff satisfaction, pupil satisfaction and community involvement.³² *BB77* states: *'It is essential that school buildings are attractive, fit for purpose, effective and convenient for everyone to use. Children, young people and adults respond well to aesthetics and appropriate sensory stimuli. They can also be consulted and involved in the design of their school, in an appropriate way.'*³³ In addition, new school buildings are subject to assessment by BREEAM (Building Research Establishment Environmental Assessment Method), which appraises the environmental performance of building design, and can influence artists involved in school design;³⁴

- *Building Bulletins* and pupil numbers are used to calculate the funds that each local authority's BSF programme receives from the government in the form of capital grants for D&B and ICT contracts, and PFI credits for PFI contracts. Financial allowances are applied to: the proposed floor areas for each of the schools; 'abnormal' costs which are beyond standard construction costs; regional variations in building costs; furniture and equipment per pupil; ICT per pupil; 'life cycle costs' (Facilities Management (FM) and maintenance costs) for PFI credits for PFI contracts; and inflation. The calculation is made and checked using PfS' Funding Allocation Model (FAM) at different stages of the BSF process.³⁵ The *Building Bulletins* and the FAM do not make specific reference to public art. However, the aspirations of the *Building Bulletins* for BSF schools suggest that the integration of public art within schools can be supported by capital grants and PFI credits. Furthermore, as is demonstrated in section 2.3.2 of this document, this support can be generated and supplemented by funding from other sources;
- *The National Curriculum for Art and Design for Key Stage 3* states that the curriculum should provide opportunities for pupils to: *'engage with contemporary art, craft and design, working with creative individuals and in creative environments where possible'*;³⁶
- ACE has included BSF within its corporate plan, *Great art for everyone 2008-2011*. ACE states: *'We want all children and young people in England to have contact with the arts – as participants and audience members.'* Access to the arts enables the *'development of children's own artistic skills and cultural understanding, but also encourages the development of their talents in other aspects of their lives... The future of the creative economy depends on opportunities for children and young people to participate in arts and creativity being provided today'*;³⁷
- In 2007, the Specialist Schools and Academies Trust published *Arts spaces in schools: designing for excellence*. This document provides guidance on the provision of arts spaces and facilities in schools and Academies. However, it also highlights the role that public art can play by promoting the ability of

³² *Building Bulletin 98: Briefing Framework for Secondary School Projects: Revision of BB82: Area Guidelines for Schools* (Secondary section), Department for Education and Skills (DfES), November 2004, p.15

³³ *Building Bulletin 77: Designing for Pupils with Special Educational Needs and Disabilities in School (BB77)*, Department for Education and Skills (DfES), 2005, p.11

³⁴ <http://www.breeam.org/>

³⁵ *An Introduction to Building Schools for the Future*, 4ps, Department for Children, Schools and Families (DCSF) and Partnerships for Schools (PfS), 2008, pp.26-29

³⁶ *Art and design: Programme of study for key stage 3 and attainment target*, Qualifications and Curriculum Authority (QCA), 2007, p.22

³⁷ *Great art for everyone 2008-2011*, Arts Council England (ACE), 2008, pp.18-19

artists to contribute to visioning the design of schools and to developing specific permanent and temporary public art projects.³⁸

For further signposting to information, advice and support addressing relevant national policies and strategies please refer to Appendix 5 of PfS' guidance document published in July 2009, *Requirements and guidance on culture for local authorities entering the second half of the Building Schools for the Future programme*.³⁹

2.3.2 There are a number of organisations involved in the BSF process which support public art.

- The Construction Industry Council (CIC) is a non-profit making body concerned with all aspects of the built environment which manages the Design Quality Indicator (DQI) process, a method of evaluating both the design and construction of new buildings and the refurbishment of existing buildings. A DQI for Schools (DQIfS) was launched in 2005 and measures school design quality according to three criteria: functionality; build quality; and impact. PfS advises that all BSF schools should use DQIfS.⁴⁰ The DQIfS process is most effective when as wide a user group as possible is engaged and it is designed to involve all stakeholders, including students and teachers, who have an interest in the new school buildings. Artists can inform the production of DQIfS and their inclusion within key BSF documents.
- The Commission for Architecture and the Built Environment (CABE)⁴¹ is an advisory body to the BSF programme on design issues, funded by the DCSF to support local authorities through the use of CABE's design Enablers and their Schools Design Panel.⁴² CABE has severely criticised many BSF projects for their design flaws, stating that many designs seen to June 2008 were not yet good enough to support educational transformation.⁴³ Despite the presence of design advisors and champions, CABE has commented that BSF bids are being judged on: "*speed and cost but not design.*"⁴⁴

A CABE Enabler is assigned to each local authority as it enters the BSF process in order to establish early awareness of good design, to encourage the appointment of a Client Design Advisor (CDA), and to support the BSF programme and CDA for a fixed period of time. CABE's Schools Design Panel is now a formal part of the BSF process and evaluates the design quality of proposals for BSF schools. The Panel consists of a pool of forty professionals, including architects with school design skills and practitioners with more general experience. It assesses the designs of the sample schools developed by the bidding PSPs and then the winning PSP, and, if necessary, selected non-sample schools developed by the LEP. The Panel assesses

³⁸ *Arts spaces in schools: designing for excellence*, Specialist Schools and Academies Trust, 2007, p.54

³⁹ *Requirements and guidance on culture*, p.34

⁴⁰ *BSF: Outline Business Case: Guidance (For approval to procure a LEP to deliver investment in the Secondary School Estate)*, Partnerships for Schools (PfS), April 2007, p.7

⁴¹ <http://www.cabe.org.uk/>

⁴² <http://www.cabe.org.uk/default.aspx?contentitemid=1706>

⁴³ <http://www.cabe.org.uk/default.aspx?contentitemid=2643> and 'Cabe says half of school designs aren't good enough', Will Henley in *Building Design*, 20 February 2009, p.5

⁴⁴ Matt Bell, director of campaigns and education at CABE quoted in 'Flagship schools: On shaky foundations', Hilary Wilce in *The Independent*, 21 September 2006

designs against ten criteria⁴⁵ using a four-point scale (very good, pass, unsatisfactory, poor). The same scale is used to rate designs for overall quality. Only designs with overall quality ratings of 'very good' or 'pass' will meet the Minimum Design Standard (MDS), jointly developed by the DCSF, PfS and CABE and launched in May 2009.⁴⁶ Designs which do not make the grade will be rejected by the Panel. The MDS is currently being piloted, but from Autumn 2009 it will be a requirement for all BSF projects yet to procure a PSP.

The Panel reviews the designs of the sample schools three times during the Competitive Dialogue stage of the BSF process: at Invitation to Participate in Dialogue (IPD) Phase 1; at IPD Phase 2; and at Invitation to Submit Final Tender (ISFT) and before a reserved matters or full planning application for a school is granted planning permission by the local planning authority. Any designs which do not achieve the MDS at this stage need to be revised and re-submitted until they achieve a design quality rating of 'pass' or 'very good'. Consequently, the MDS enables CABE's Panel to reject schemes throughout the Competitive Dialogue stage due to poor design. The Panel can therefore challenge the DQIfS process, taking precedence over DQIfS as the key BSF design assessment tool. Therefore, it is vital that the CDA and the CABE Enabler work with the local authority and schools to reflect and embed the aspirations of the MDS within the DQIfS.

CABE advocates public art in key documents. *Creating Excellent Buildings: A Guide for Clients* states the benefits of artists being included in the Project Team: '*artists can: create new and original possibilities for a project team; relate to the social and economic context; generate innovative ideas through public participation; think creatively about a whole scheme, not just parts, eg street furniture; contribute to the conceptual process of creating new urban spaces and places; engage the public or special groups in the process of change; increase people's understanding and feeling of ownership.*'⁴⁷ As a result, CABE can promote the commissioning of public art in support of its current assessments of the design and function of schools and the proposed use of the MDS.

- CCE⁴⁸ is the new national organisation, created to generate cultural and creative programmes for children and young people across England. In addition to *Find your Talent* (see 2.3.1) it delivers CP⁴⁹ – the government's flagship creative learning programme – to help young people discover their creative talents, develop their skills, raise their aspirations and achievements and open up more opportunities for their futures. CP supports long-term partnerships between schools and creative professionals, including artists. It is delivered through a range of organisations who administer the programme locally.⁵⁰ A key CP initiative regarding BSF is 'Change Schools'.⁵¹ The

⁴⁵ The 10 assessment criteria are: Identity and context; Site plan; School grounds; Organisation; Buildings; Interiors; Resources; Feeling safe; Long life, loose fit; and Successful whole. For further information see:

<http://www.cabe.org.uk/files/successful-school-design.pdf> and <http://www.cabe.org.uk/design-review/schools/about>

⁴⁶ <http://www.cabe.org.uk/design-review/schools/minimum-design-standard>

⁴⁷ *Creating Excellent Buildings: A Guide for Clients*, Commission for Architecture and the Built Environment (CABE), 2003, p.98

⁴⁸ <http://www.creativitycultureeducation.org/>

⁴⁹ Creative Partnerships has been running since 2002 and has worked with over 2,700 schools across England, from Key Stage 1 to Key Stage 4. <http://www.creative-partnerships.com/>

⁵⁰ <http://www.creativitycultureeducation.org/our-programmes/creative-partnerships/>

schools recruited as 'Change Schools' need to demonstrate a commitment to putting creativity at the heart of their improvement plans and to educating children and young people for a creative future. The initiative focuses on: generating long-term dialogue about creative teaching and learning; making effective creative learning environments; and encouraging the development of conditions in which creativity can thrive. Successful projects have involved a variety of creative professionals including architects, designers and artists.

- 'ARTS alive!'⁵² recommends individual artist's involvement in schools. It explains that these partnerships offer artists a vehicle for sharing and developing creative ideas with others and enable them to supplement their income as creative practitioners by working in schools. Their involvement can vary from a single session to a residency lasting a week, or even a year, in which the artist could offer *'workshop sessions and keeps an 'open door' so that pupils and staff can watch them at work and develop an understanding of the creative process.'* Practitioners can develop long-term relationships with schools: *'tailoring their skills and ideas to meet the needs of pupils and staff, and making an important contribution to curriculum development.'*⁵³ ARTS alive! also recommends schools work together in order to enhance their arts provision by pooling their resources to buy in artists more economically or providing out-of-hours and holiday arts activities together, which can be led by an arts practitioner. There is considerable scope for inter-school collaboration under the new Diploma arrangements which commence in Autumn 2009, where schools offer specialisms on an area basis.⁵⁴ So, for example, a school specialising in media and performance could become a centre for artistic and cultural engagement for a group of local schools.
- With the support of the Architecture Centre Network (ACN), some regional Architecture Centres are supporting artists' involvement with BSF at a regional level. Many of the regional Centres have invested substantial effort in developing school-based design projects where art and architecture converge to create a wider understanding of, and influence on, learning environments. In many cases, the projects have promoted collaborative working relationships between architects and artists who have acted as co-facilitators with school communities. The Architecture Centres are becoming involved in public art initiatives. BEAM, the centre in Wakefield, is encouraging artists and architects to work with pupils, teachers and governors to develop briefs for the architects involved in BSF programmes.⁵⁵ Bristol Architecture Centre assisted Real ideas Organisation (RiO)⁵⁶ in appointing a Lead Artist Facilitator and a Lead Design Facilitator for their BSF project (For further information see Somerset County Council's BSF programme (2.3.3)). MADE (Midlands Architecture and the Designed Environment)⁵⁷ has, with ACE funding, appointed an Arts and Culture Adviser to work specifically on the BSF programme regionally.

⁵¹ <http://www.creative-partnerships.com/programmes/change-schools/>

⁵² <http://www.qca.org.uk/artsalive/>

⁵³ http://www.qca.org.uk/artsalive/steps_to_success/help_outside_partners.htm

⁵⁴ <http://yp.direct.gov.uk/diplomas/>

⁵⁵ <http://www.architecturecentre.net/docs/network/centres/?MDo3ODow>

⁵⁶ Real ideas Organisation (RiO) is a community interest company and social enterprise that has grown out of Creative Partnerships in the South West region, <http://www.realideas.org/>.

⁵⁷ <http://www.made.org.uk/>

- ACE national office has appointed a BSF Culture post – Cultural Adviser, Building Schools for the Future – a part-time one-year fixed-term contract, part-funded by PfS, to advocate culture and the arts as part of BSF initiatives.
- Most regional offices of ACE advise on public art either directly or through organisations with a regional remit. They can play an important role in supporting the integration of local authorities' public art policies and strategies within BSF.⁵⁸
- A number of regional BSF Culture posts, joint-funded by a variety of organisations including ACE, The MLA and Sport England and intended to embed physical education, sport and culture within the BSF process, have been established across the country.⁵⁹ These posts are critical to assisting with the engagement of artists within BSF.
- The Sorrell Foundation's aim is to inspire creativity in young people and to improve quality of life through good design, providing innovative design concepts for schools and new life skills for pupils. The Foundation launched Joinedupdesignforschools in 2000, to be used for BSF, in which a client team of pupils follows a creative process of research, meetings and discussions. The Sorrell Foundation aims to teach school staff and pupils to be 'good clients', enabling them to ask the right questions in order to achieve their desired answers. The experience of the Sorrell Foundation informs the ways that artists and designers engage with BSF.⁶⁰
- The British Council for School Environments (BCSE) evolved from SchoolWorks, a not-for-profit organisation set up in 1999, to explore how stakeholder participation in the design of new learning environments could produce inspiring and effective new models for extended and transformational schools. In 2006, the SchoolWorks approach was incorporated into the BCSE, an independent member organisation made up of schools, local authorities, construction companies and architects. The BCSE acts as a national forum for exchange, dialogue and advocacy for those interested in learning environments. Through their 'Great Schools Enquiry', the BCSE contributes to enabling the creative input of artists in the development of briefing documents and to the continued support of school stakeholders in the development of their new school projects.⁶¹
- The experience of Museum and Gallery Education Departments and their existing contacts, resources and relationships with artists can be of benefit to local authorities and schools involved in the BSF programme. Museums and galleries participate effectively as partners with schools when they adopt the role of facilitator, sharing their relationships and experiences of working with artists with schools and supporting the artist and the engagement process. Ofsted's *Drawing together* report suggests that local authorities and headteachers should: *'increase pupils' first-hand experience by developing sustained partnerships between schools, creative industries, galleries and artists in the locality'* and concludes: *'impressive work was seen where, as a result of this programme, close partnerships had been established between*

⁵⁸ For further information go to www.artscouncil.org.uk

⁵⁹ These posts are based in the West Midlands, East Midlands, and three in London. There is also currently a temporary, six-month post in the South West. In addition, there was previously an Art, Culture and Sport post in the North West.

⁶⁰ <http://www.thesorrellfoundation.com/>

⁶¹ For more information see: <http://www.bcse.uk.net/default.asp> and <http://www.school-works.org/index.asp>

*teachers and gallery educators.*⁶² School briefs for artists can be formulaic, using standardised templates to guide them through an unfamiliar process. Museum and gallery sector involvement has benefited the artist's brief, enabling it to be written from a more knowledgeable and experienced perspective, permitting the artist to maintain their artistic integrity.⁶³

- 'Learning Through Landscapes' (LTL) promotes the use of school grounds to enhance schools and educational outcomes.⁶⁴ They develop and deliver projects in which the outside spaces of schools are designed to encourage creativity, involving landscape designers, artists, teachers and young people in their creation and their ongoing use. However, despite searching for examples of good practice, Catherine Andrews, LTL's Chief Executive stated that: '*...to date, we have found no new build secondary school grounds that adequately demonstrate the 'transformation of children's experience of education' that BSF is meant to be all about.*'⁶⁵

2.3.3 There are a number of local authorities commissioning public art as part of the BSF process. These include:

Birmingham City Council's Head of Arts Education⁶⁶ led on the *Learning Spaces Living Places (LSLP)* initiative. It appointed artists and architects to inform the development and implementation of BSF, and followed a pilot project linked to the Council's preceding schools improvement programme, Public Private Partnerships 2 (PPP2). The artists and architects were asked to challenge the working practices of the schools, the Council and other stakeholders whilst simultaneously engaging students in the process of developing ideas for the development of their schools. Consequently, the project ensured that the provision of public art was required from the bidding PSPs and the LEP. *LSLP* was variously funded through local authority contributions, the PROJECT initiative⁶⁷ and ACE funding streams. The future provision of public art will be funded by the LEP's PSP and other sources;⁶⁸

Bristol City Council has a Public Art Policy, which was applied to their BSF sample schools through the use of planning conditions attached to planning applications and permissions for the schools.⁶⁹ The PSP selected to form the LEP worked with the Council's Senior Public Art Officer to appoint CP. CP (now RiO) contributed their experience of establishing creative projects within schools, providing a Project Manager, as well as funding in addition to that provided by the PSP. Stakeholder engagement played a key part in the process. The aims of the public art programme were established via a set of questions which were

⁶² *Drawing together: art, craft and design in schools*, The Office for Standards in Education, Children's Services and Skills (Ofsted), April 2009, p.7 and p.28

⁶³ Birmingham's Ikon Gallery has played the role of broker in a number of projects involving artists and schools, for example in a Black Country CP project involving a series of photographs with pupils in Walsall, *The Angel Diaries*. The artist, Mark Storor, was allowed space to be more creative, constructing his own solutions to an identified problem, resulting in a collaboration in which the process becomes more about making art. Formulaic briefs were set aside and Storor was invited to respond to the pupils, the school and its specific context, making the process more artist-led and collaborative, with the artist inviting a school to become part of their creative process. Also see *Artists and Schools*, Ikon Gallery, 2008.

⁶⁴ <http://www.ltl.org.uk/>

⁶⁵ 'Design for great grounds', Catherine Andrews in *greenplaces*, Issue 57, Summer 2009, p.24

⁶⁶ This role is part of the Children, Young People and Families Directorate.

⁶⁷ *PROJECT: Evaluation Report and Artists & Places*

⁶⁸ <http://www.cabe.org.uk/default.aspx?contentitemid=2465>, <http://www.cabe.org.uk/AssetLibrary/11453.pdf>

⁶⁹ *The Bristol Public Art Strategy: city centre<legible city>outer neighbourhoods*, Bristol City Council, 2003, http://www.bristol.gov.uk/ccm/cms-service/stream/asset/?asset_id=24603011

developed through conversations with the schools and a Public Art Commissioning Group, facilitated by the Public Art Project Manager, was established in each school. The Commissioning Body included representatives from the school (senior management and teachers); Bristol City Council; the PSP; an architect; a landscape designer; and up to twelve students from different year groups. The Assistant Head of Brislington Enterprise College stated: "*[Public Art] what a superb way of getting students involved in taking ownership of their future surroundings!*"⁷⁰ The Council's Senior Public Art Officer is currently working with the LEP on the involvement of artists in future phases of the BSF programme;

Somerset County Council's BSF Project Board and Team appointed RiO⁷¹ to manage the Stakeholder Engagement programme for six schools as part of the CP 'Change Schools' initiative. The commissioning of public art is part of this wider engagement process involving students, teachers and other stakeholders and is intended to contribute positively to it. In 2009, RiO supported the commissioning of a Lead Artist Facilitator and a Lead Design Facilitator to work with the stakeholders to generate ideas about the development of the schools; oversee the commissioning and work of other artists; represent their ideas to bidding PSPs; and evaluate and document the project. It is envisaged that when a PSP is selected to form the LEP it will fund a co-ordinator and the artists to deliver public art integrated within buildings and spaces. It will also support the delivery of public art in addition to other projects that do not have a direct impact on the physical characteristics of the schools;⁷²

Sandwell Borough Council's BSF Project Board and Team adopted a Public Art Policy at the start of their BSF programme. This led to the development of a series of aims for public art which, when implemented, could influence the physical development and the learning and community activities of the schools. These aims, along with a financial requirement for public art, informed and were included within the key BSF documents against which bidding PSPs were required to develop their submissions for the delivery of the BSF programme. The bidding PSPs appointed public art expertise to develop comprehensive responses to the requirements for public art which were evaluated by members of the BSF Project Board and Team. Post-Financial Close, the public art expertise working for the selected PSP and the LEP will lead on the development and implementation of its response by appointing artists to work with students, teachers and other stakeholders. The funding provided by the PSP will be supplemented by funding from other sources;⁷³

Sheffield City Council has a Public Art Policy and, using planning conditions attached to planning applications and permissions for the schools, these were applied to their BSF sample schools.⁷⁴ The LEP's PSP allocated funding and worked with the Council's Public Art Officer to appoint the architecture centre,

⁷⁰ Dave Schofield, quoted in 'Bristol BSF - Pupil Engagement through Public Art', http://www.bsf-culture.co.uk/case_study.php?id=31

⁷¹ <http://realideas.org/real/work/building-schools-for-the-future>

⁷² <http://www.thisissomerset.co.uk/bridgwater/news/Children-help-visionary-future-schools/article-708347-detail/article.html> and <http://www.bsf.somerset.org.uk/v.asp?level2id=5988&rootid=5988&depth=1>

⁷³ www.bsf.sandwell.gov.uk

⁷⁴ *The City and Art: A Public Art Strategy for Sheffield 2001-2004*, Sheffield City Council, November 2001, <http://www.publicartonline.org.uk/resources/practicaladvice/policiesguidance/strategies/documents/SheffieldPublicArtStrategy.pdf>

Beam,⁷⁵ to lead on the recruitment and management of artists to deliver public art for the sample schools.⁷⁶ The LEP is currently working on the initial proposals and programme of work for the non-sample schools and the PSP and the Public Art Officer are discussing the engagement of artists within these schools;⁷⁷

Bradfield School is part of Sheffield City Council's BSF programme and is scheduled to be rebuilt in 2012. The Vision initiative was a collaboration between the school; the Architecture Centre, Beam; the school's architect; and an artist. It was funded by the regeneration agency, Integreat Yorkshire.⁷⁸ The initiative's aim was *'to provide young people with the skills and knowledge to allow them to voice their ideas for the design specifications for their new school'*, raising their aspirations about design and increasing their understanding of how public art can be integrated into new school buildings and grounds, teaching students to be better clients.⁷⁹ The initiative involved a site visit for the students to Sheffield City Centre; creative workshops; and an exhibition, and resulted in a mini toolkit being produced for young people to take away and use to explore places, spaces and design. The Vision initiative will inform the current discussions between the LEP's PSP and the Council's Public Art Officer, as mentioned above.

From the examples above, it is evident that local authorities trigger the inclusion of public art within BSF via specific initiatives or the adoption of generic public art policies through internal agreements and the local planning system. It is also evident that public art is funded via the following routes: from a local authority's own budgets; as a local authority's requirement on bidding PSPs and a LEP; and by a range of alternative funding sources, which include CCE, ACE and regeneration agencies.

The BSF Culture website currently provides further information regarding the role of the arts in general, as well as public art, within the BSF process.⁸⁰ A Pfs Culture website is due to be published shortly.⁸¹

2.3.4 There is an increasing body of evidence and research that supports the instrumental value of artists' involvement in education.

- engage is a membership organisation promoting access to and enjoyment and understanding of the visual arts through gallery education.⁸² It articulates the benefits pupils achieve through engaging in creative activities and working with creative practitioners as: *'the ability to value subjectivity and experimentation; to think critically, negotiate and listen; an increased level of social interaction and development of individual opinions.'*⁸³
- The Office for Standards in Education, Children's Services and Skills (Ofsted)'s April 2009 report, *Drawing together. art, craft and design in schools*, found that opportunities to work with a visiting artist or in an art gallery have an immediate and lasting impact on pupils' creative aspirations

⁷⁵ <http://www.beam.uk.net/>

⁷⁶ <http://www.sheffield.gov.uk/education/services-to-schools/buildings/rebuild-refurb/bsf>

⁷⁷ <http://www.sheffieldbsfschools.com/Pages/home.aspx>

⁷⁸ Integreat Yorkshire is the Regional Centre of Excellence (RCE) for regeneration, renaissance and place-making skills for Yorkshire and the Humber. It is funded by Yorkshire Forward, the Regional Development Agency (RDA) for Yorkshire & Humber. <http://www.integreatyorkshire.com/>

⁷⁹ http://www.bsf-culture.co.uk/case_study.php?id=35 and <http://www.integreatyorkshire.com/vision.htm>

⁸⁰ <http://www.bsf-culture.co.uk/>

⁸¹ See the Pfs website for further details: <http://www.partnershipsforschools.org.uk/index.jsp>

⁸² <http://www.engage.org/home/index.aspx>

⁸³ 'Why Do Schools Work With Artists?' in *Artists and Schools*, Ikon Gallery, 2008, pp.12-13

and achievements, yet discovered that these experiences were rarely available to all pupils.⁸⁴ It advocates: *'opportunities to engage directly with contemporary artists, craftworkers and designers.'*⁸⁵ *'In the secondary schools visited, the best work demonstrated ... the impact of specialist teaching and working with galleries and practising artists.'*⁸⁶ The report's Executive Summary recommends that the DCMS should: *'promote opportunities for every child and teacher of the subject to have the opportunity to work in an art gallery, or with an artist, craft worker or designer as part of their cultural entitlement.'*⁸⁷ The report also states that: *'The importance of contemporary art in education has been well documented. Inspectors found that gallery visits, especially when they drew on the expertise of gallery educators, were instrumental in changing pupils' perceptions of the value of art – and contemporary practice in particular.'*⁸⁸ In addition, it comments that: *'Teachers, teacher trainers and gallery educators referred to research indicating that work with galleries and artists promotes pupils' personal development and wider achievement.'*⁸⁹

- CP's research demonstrates that: *'during creative activity, participants often start to identify problems, demonstrate divergent thinking, share knowledge, take risks, explore new challenges and refine ideas.'*⁹⁰ These new skills: *'develop pupils' ability to solve problems more effectively, generate new ideas, increase capacity to learn, increase the extent to which they engage in learning, build confidence, demonstrate new skills and produce outcomes of value to them and to others.'*⁹¹
- In 2006, ACE published *The power of art: visual arts: evidence of impact, regeneration, health, education and learning*. It claims that: *'Artists and the arts have played a central role in education and lifelong learning for centuries. The arts foster innovation and creativity from the very earliest stages of a young child's development, and at all stages of the school curriculum. Outside formal educational settings, artists engage with some of society's most excluded groups: offenders and people within the criminal justice system, refugees, or older people in isolating urban environments. There is a growing body of evidence about the positive impact of arts education and of artists in education.'*⁹²
- Research by the National Foundation for Educational Research (NFER), published in 2005, explored the relationship between the arts and education through a programme of arts-based interventions and provided some evidence of the outcomes of arts education. Pupils discovered *'a new world of arts knowledge and skills ... through their encounter with professional*

⁸⁴ The report is based on a three-year evaluation of art, craft and design conducted by Her Majesty's Inspectors and Additional Inspectors between 2005 and 2008 in primary and secondary schools. During the survey, ninety primary and ninety secondary schools were inspected, including two special schools. These randomly selected schools were located in urban and rural areas across England. Inspectors evaluated achievement and standards, teaching and learning, curriculum provision, and leadership and management of art, craft and design education.

⁸⁵ *Drawing together*, p.13

⁸⁶ *Drawing together*, p.4

⁸⁷ *Drawing together*, p.6

⁸⁸ *Drawing together*, p.16

⁸⁹ *Drawing together*, p.32

⁹⁰ 'Why Do Schools Work With Artists?' in *Artists and Schools*, Ikon Gallery, 2008, pp.12-13

⁹¹ 'Why Do Schools Work With Artists?', pp.12-13

⁹² *The power of art: visual arts: evidence of impact, regeneration, health, education and learning*, Arts Council England (ACE), 2006, p.70

artists' and found the programme 'engaging, stimulating and fulfilling',⁹³ underlining the notion that the arts can fulfil the government's vision of ensuring that learning is an enjoyable experience. It also identified specific benefits of visual artists working in schools, including developments in creativity, allowing pupils to try out, practise or explore their own ideas.⁹⁴

- The nature of education is changing with the sector's increasing shift away from a content-driven curriculum towards a more skills-based approach, a move that has instigated and encouraged schools' engagement with artists. A 2004 ACE North East report stated: '*There is widespread recognition that active partnerships between an artist and school can offer long-term development opportunities that are central to many government initiatives for raising achievement.*'⁹⁵ However, despite this, there has been a lack of actual change to the curriculum as teachers still find themselves unable to embrace a cultural agenda because there is insufficient space for it within the mandatory curriculum. John Holden's consultation paper for Demos, *Culture and Learning: Towards a New Agenda*, underlines this tendency, noting that teacher training pays little attention to the arts and, consequently, new teachers do not understand how to introduce the arts into their teaching. Furthermore, artists need more opportunities to develop their practice in relation to learning, enabling them to work more effectively with schools and in other learning contexts.⁹⁶ Holden emphasises this in his description of cultural learning as falling into two categories: 'arts' or 'education', with few teachers and artists acknowledging that the two are inextricably intertwined.⁹⁷
- In November 2003, Phyllida Shaw wrote a briefing paper for ACE investigating the role of the arts in neighbourhood renewal entitled *What's art got to do with it?*. One of the case studies she looked at was the 'Arts and the Learning City' project.⁹⁸ It ran eleven research projects and concluded that: '*the arts are effective in attracting and motivating some of the most disaffected people to take part in learning and education; the involvement of people in the arts maintains their commitment to other study skill areas; and that taking part in the arts is a way to integrate and develop communities that feel excluded by giving them a way into education and employment in London.*'⁹⁹

Despite the evidence and research detailed above, in June 2006 ACE commissioned a report which identified the need for further research into the benefits of artists' involvement in education. It recommended that a framework for consistently measuring social impact be embedded in the visual arts sector

⁹³ <http://www.nfer.ac.uk/research-areas/pims-data/summaries/the-arts-and-education-interface-evidence-based-research.cfm>

⁹⁴ *The Arts-Education Interface: a Mutual Learning Triangle?*, John Harland, Pippa Lord, Alison Stott, Kay Kinder, Emily Lamont and Mary Ashworth, National Foundation for Educational Research (NFER), Slough, 2005

⁹⁵ *Artists working in partnership with schools: Quality indicators and advice for planning, commissioning and delivery*, Report by Ann Orfali, Arts Council England (ACE) North East, August 2004, p.3

⁹⁶ *Culture and Learning: Towards a New Agenda*, John Holden, 28 February 2008, Consultation Paper, Demos, p.16

⁹⁷ *Culture and Learning*, p.18

⁹⁸ 'Arts and the Learning City' was a widening participation project funded by the Higher Education Funding Council for England (HEFCE) and managed by the London Institute. It sought to explore whether consortium members could widen participation in art, design and performance by building links with community and art groups which had a successful record of engaging members of lower socio-economic groups or others likely to be 'under-represented' in Higher Education. (<http://www.arts.ac.uk/docs/FINALREPORT.pdf>)

⁹⁹ *What's art got to do with it? Briefing paper on the role of the arts in neighbourhood renewal*, Phyllida Shaw, Arts Council England (ACE), November 2003, p.10

and be applied to collect more robust – and much-needed – data on the economic and social contribution made by visual artists in regeneration, health and education.¹⁰⁰ ixia and OPENspace have created an Evaluation Toolkit for public art which can be used to achieve this.¹⁰¹

For further signposting to information, advice and support addressing evidence and research which corroborates the instrumental value of artists' involvement in education, please refer to Appendix 5 of PfS' guidance document published in July 2009, *Requirements and guidance on culture for local authorities entering the second half of the Building Schools for the Future programme*.¹⁰²

2.3.5 Growth in support does not necessarily ensure innovative approaches.

Support for public art exists within the education sector and BSF. This is beneficial, but can lead to preconceived notions and narrow definitions of public art. This can be made worse by local authorities' public art policies and strategies. Limited expectations are often reflected in their public art guidance, which is a problem in all contexts, not just within BSF, and can restrict the roles artists are able to have. Long-standing definitions tend towards placing permanent objects (e.g. statues, metalwork, glasswork) above other types of practice (e.g. consideration of the overall qualities of the built environment, temporary installations and events, residencies, and the use of ICT).

2.3.6 Practice varies and can be restrictive. This review has found that ACE and most local authorities' public art policies and strategies advise that public art expertise and artists should be involved at the inception of all types of developments. Where public art expertise and artists are to inform the physical aspects of BSF schools, some local authorities use the BSF process to attempt to achieve this. However, others do not, and as a consequence this can restrict opportunities for artists.

As previously mentioned, after a local authority has identified all the schools that are to be included in its BSF programme, two schools are chosen as sample schools. They are normally a new school and the refurbishment of an existing school using PFI and D&B contracts. The sample schools play a significant role in the process of evaluating bids made by potential PSPs as they represent the design and costs of all the schools that the local authority, a PSP and PfS will deliver when they form a LEP. The Strategic Partnering Agreement (SPA) is the contractual agreement between the LEP and the local authority which governs the work of the LEP. Importantly, the SPA identifies the partnering services which the LEP will provide to the local authority to ensure that the sample and non-sample schools are built and that educational standards and attainment improve. All the schools have to be built within a ten-year period.

¹⁰⁰ ACE's report drew on research by Prevista Ltd from 2005 which looked at evidence of the impact of the visual arts in three social policy areas: regeneration; health; and education and learning. Twenty case studies provided an assessment of contemporary artists engaging with communities, recommending further moves to embed the visual arts in public policy development. A movement for evidence-based policy making was underpinned in 1999 by the Cabinet Office's initiative *Modernising Government*. Consequently, it is vital that contemporary visual arts organisations evaluate the impact of their work in order to support *'the mounting evidence that the visual arts, particularly contemporary practices, have a distinctive and important, but under-realised role in delivering access and social inclusion across society'*. (*The power of art*, p.6)

¹⁰¹ ixia's Evaluation Toolkit is designed to assist users to: carry out an appraisal of the feasibility of a public art commission; maximise the potential of a public art commission and identify different goals; identify and agree the outcome measures that are appropriate to assess impact; and agree systems for collecting, storing, analysing and reporting on data gathered. For further information visit: <http://www.ixia-info.com/research/evaluation/>

¹⁰² *Requirements and guidance on culture*, p.34

When artists are involved from the inception, local authorities engage public art expertise and artists at the Pre-Initiation stage of the BSF process. The advantage of this is that both public art expertise and artists can collaborate with students, teachers and other stakeholders to fully explore ideas that relate to the provision of school buildings and spaces. This enables the production of an informed strategy for public art and the inclusion of its demands on the physical aspects of the schools can be secured within the key BSF documents, in particular: the SfC; the Outline Business Case (OBC); the FSOS for the sample schools; the Information and Communication Technology Output Specification (ICTOS)¹⁰³ and the SPA. As a result, the bidding PSPs are clear about what they need to consider in order to satisfy the local authority's requirements for, and evaluation of, the provision of public art, including their appointment of public art expertise and artists.

The review has found that some local authorities merely insert a budget within the FSOS, which the bidding PSPs are expected to allocate to the commissioning of public art. Consequently, a budget is allocated for public art for the sample and non-sample schools, but the process of discussing and commissioning public art does not begin until after the LEP has been formed.

The key issue raised by this approach is that opportunities for public art are lost. On the side of the local authority, public art expertise and artists do not engage in expansive discussions with students, teachers and other stakeholders regarding a strategy for public art which could include influencing physical aspects of the sample and non-sample schools. Critically, this includes the lack of involvement from artists in the agreement of DQIfS for the sample and non-sample schools. On the side of the bidding PSPs, this means that they are not obliged to appoint public art expertise and artists to respond to any requirements for public art before the stage in the BSF procurement process at which the sample schools are designed and most of the physical requirements for the non-sample schools are defined. Public art is subsequently not factored into the overall design, construction, FM and maintenance costs and programmes for the new schools.¹⁰⁴

The implications for the late engagement of the artist on the individual artist is that they are isolated from the overall process of designing a school, with public art being viewed as an 'add on'. Bristol's BSF evaluation document supports the importance of the early engagement of artists when *"there's still a blank canvas"*. The Project Architect's experience taught the architects that: *"in the future, we won't draw up plans for the prospective public art element of a new building before the artist is involved, to ensure the public art element and building fabric are fully realised in their own right."*¹⁰⁵

Artists' late engagement can result in a restrictive brief, with the LEP being reluctant to revisit physical aspects of the sample and non-sample schools which

¹⁰³ http://www.partnershipsforschools.org.uk/documents/PfS_Factsheet_ICT.pdf

¹⁰⁴ Evidence procured through post-occupancy evaluation underlines the need for artworks to be considered within FM and maintenance budgets. The DCSF *'expects buildings to be maintained to a suitable standard'* (*An Introduction to Building Schools for the Future*, p.81) and maintenance budgets for public art should be ring-fenced from the budgets of the PFI companies or the local authorities and/or the schools themselves in D&B, as the general maintenance budget cannot be expected to include adequate provision for maintaining public art.

¹⁰⁵ Chris Donoghue, Project Architect at Wilkinson Eyre quoted in *Bristol Building Schools for the Future. Wave 1 Pathfinder: Pupil Engagement through Public Art - Evaluation Report*, Dr Roz Hall, Creative Partnerships (CP), Bristol City Council, Skanska and RiO/Creative Partnerships Bristol, June 2008, pp.17-18

have already been costed and agreed with students, teachers, the local planning authority and other stakeholders. An example of this occurring is implicit within a recent public art brief, which states that the integration of art within buildings and spaces should be done at little or no additional construction or FM costs to the BSF schools.

In addition, artists' late engagement can lead to insufficient levels of funding for the provision of public art because the budget initially allocated to be spent on public art was arbitrary. Furthermore, because public art is viewed as an 'add on', the opportunity is lost for some of the PSP's costs for supporting the design, fabrication, installation and maintenance of the artwork to be absorbed within other budgets. The amount which the local authority had intended to be ring-fenced to be spent on the artwork itself is consequently depleted. This has occurred in numerous cases in which money from the public art budget has been spent on, for example, an artwork's long-term maintenance costs.

Lack of early engagement can also prevent full consideration of whether or not artists should inform the physical aspects of BSF schools. Public art expertise and artists working with students, teachers and other stakeholders could instead decide to focus on the delivery of temporary public art projects which support the school's learning and community activities and roles. These projects could utilise the National Curriculum, ICT and the characteristics and locations of the schools. In such cases, the production of a public art strategy specifies the management and financial requirements of the projects within the BSF procurement documents. However, it is important to note that the delivery of temporary public art initiatives should be considered in relation to the FM aspect of BSF schools. Post-Occupancy Evaluation has underlined the need for sufficient flexibility within a planned maintenance regime to allow the art and design departments in a school to exercise their ability to physically augment the new school building with work produced by artists, students and staff. In some cases, PFI FM regimes have simply ignored efforts by schools to take ownership of spaces through artworks, due to the fear that financial penalties can be applied should planned maintenance not be undertaken. In one example, a PFI school in South London that consistently tried to utilise the suspended ceiling grid in their art department for hanging artworks found that works were removed and the ceiling tiles reinstated on a regular basis. In addition, stencilled and applied artworks in corridors have been painted over during planned maintenance periods.

2.3.7 A vision, policy and strategy for public art are extremely important. A vision should form the basis of a local authority's overall public art policy and strategy. Current documents by Bournemouth Borough Council,¹⁰⁶ Southampton City Council¹⁰⁷ and Bristol City Council¹⁰⁸ promote a broad vision for public art and consider where, when and how public art will be commissioned within all types of developments and as part of place-wide initiatives promoted and adopted by the local authorities. In general, and within the context of BSF, these public art policies and strategies provide an important hook that can be used to ensure the

¹⁰⁶ *A Public Art Development Plan for Bournemouth*, Bournemouth Borough Council, 2006, <http://www.bournemouth.gov.uk/Library/PDF/Residents/Libraries/Bournemouth%20Public%20Art%20Development%20Plan.pdf>

¹⁰⁷ *artpeopleplaces: Southampton Public Art Strategy*, Southampton City Council, 2004, [http://www.southampton.gov.uk/Images/Public%20Art%20Strategy%20\(SPG\)2_tcm46-161024.pdf](http://www.southampton.gov.uk/Images/Public%20Art%20Strategy%20(SPG)2_tcm46-161024.pdf)

¹⁰⁸ *The Bristol Public Art Strategy: city centre<legible city>outer neighbourhoods*, Bristol City Council, 2003, http://www.bristol.gov.uk/ccm/cms-service/stream/asset/?asset_id=24603011

inclusion of public art. These local authorities have identified that schools provide significant opportunities for public art and, where appropriate, will apply their public art policies and strategies to BSF programmes by internal agreements and/or the local planning system.

Successful visions create opportunities for artists to engage with a school, its environment and its key stakeholders in a meaningful way. They can facilitate the inclusion of artists' ideas within the design of the building as well as enabling commissions which support the learning and community activities of a school. The scale of some BSF programmes enables spending on individual schools, but also the possibility for strategic investment across the local authority's BSF programme.

PfS recommends that a mandatory CSG advises on the involvement of artists and arts organisations within a local authority's BSF programme.¹⁰⁹ Initially, it does this by undertaking a Strategic and Facilities Audit as part of the RtD and SfC process. This can include ensuring that a local authority's public art vision, policy and strategy secures, guides and informs the development and implementation of public art commissions when: the FAM, RtD, SfC, OBC, FSOS and IPD are being completed by the local authority; bids are being prepared by PSPs and assessed by the local authority and PfS; the SPA is signed; and once the LEP is formed and active, undertaking the physical development and management of the schools. Again, the importance of establishing a vision and an objective for artistic engagement is asserted by Ofsted's 2009 report, *Drawing together*, which supports the need for planning and strategic thinking. It advocates situations in which successful partnerships were nurtured between schools, art galleries and artists and which '*prospered because they were managed with a clear and specific purpose.*'¹¹⁰

The Strategic and Facilities Audit enables the CSG to identify existing arts initiatives and opportunities to utilise external funding. For example, there is potential for existing artist-led activity (which might be through CCE's CP programme or Arts Award qualifications) to influence and contribute to school stakeholders' views on new school designs for the BSF process.¹¹¹ As mentioned previously, the CP Change Schools initiative positively promotes the ways in which creative professionals, including architects and artists, can usefully 'co-construct' new teaching and learning programmes concerned with design-focused activity. Such opportunities for collaboration can support the delivery of public art commissions within the BSF process.¹¹²

In addition to considering public art, through this process the CSG can also ensure that it maps and develops any existing relationships between schools and the activities of arts organisations and the creative industries. Pupils who are offered the chance to experience public art through the BSF process can be inspired to think about previously unconsidered opportunities to pursue careers in

¹⁰⁹ *Requirements and guidance on culture*

¹¹⁰ *Drawing together*, p.37

¹¹¹ Detailed School SfCs should make reference to any particular specialisms or links to the creative industries that the school itself (rather than the local authority) may have.

¹¹² Whilst these programmes are more concerned with the process of learning, rather than the quantifiable outcomes or products of an artist-school collaboration, they do have the potential to grow objective skills and understanding of how to discuss and imagine the built environment as a changing and ever-evolving place. The benefit, therefore, can be measured by adjacent activity in schools resulting from increased confidence in stakeholder groups to talk about and demand a more creative and inspiring school environment.

the cultural sector. This can be additionally enabled by colleges and Further Education, and the introduction of Specialised 'Construction and the Built Environment' and 'Creative and Media' Diplomas, new qualifications for fourteen to nineteen year olds created to offer an alternative to more traditional education and qualifications, provide an opportunity for this to happen.¹¹³

2.3.8 Current thinking and recent research projects have shown a consistent set of good practice principles. John Holden's consultation paper for Demos, *Culture and Learning: Towards a New Agenda*, includes the criticism that schools deal with artists in a 'whimsical' manner.¹¹⁴ This review reveals widely-recognised standards of practice that should be met. These beliefs indicate the public art sector's experience and knowledge and the research projects support these principles. ixia has summarised these as:

- clarity of intention on behalf of the commissioner;
- the appointment of artists at the inception of development projects;
- commitment to the project on behalf of all parties;
- the allocation of adequate rates of pay and contracts for artists;
- the input of public art expertise.¹¹⁵

Eric Holding's and Fred Brookes' evaluation of the impact of artists on the development process as part of the PROJECT initiative endorses these principles. The following two findings were the most significant elements of the evaluation:

- Engagement of an artist from an early stage in a building project, in good circumstances, raises the quality and value of a project to achieve a positive effect on the built environment and brings about a positive change of mindset, working practice and discourse amongst others;
- When artists are working on a building project, contributing their professional expertise and creativity, they should be engaged on the same terms as the other professionals involved to ensure parity of esteem.¹¹⁶

2.3.9 The development and implementation of a vision, policy, strategy and good practice for public art within the context of BSF requires time and the involvement of public art expertise. In general, time and skills are recurrent concerns within assessments of BSF:

- A local authority's SfC includes its educational vision and strategy and its estate strategy. In order to develop a meaningful estate strategy, the SfC has to capture – and make proposals to meet – the design challenges posed by all its schools. Consequently, Schools' Strategies for Change (SSfCs) need to inform the development of the local authority-wide SfC. PfS' *Schools' Strategy for Change Guidance* advises: 'the sooner schools start their SSfCs, the better the briefs the local authority use for their estate strategy' and continues: 'SSfCs take a long time to develop. The rigour and breadth of the

¹¹³ Some schools and colleges began teaching Diplomas in 2008, with more being phased in during 2009 and 2010. By 2013, the Diploma programme will be fully implemented. For further information visit: <http://www.dcsf.gov.uk/14-19/index.cfm?go=site.home&sid=3&pid=224&lid=453&ctype=Text&ptype=Single>.

¹¹⁴ *Culture and Learning: Towards a New Agenda*. John Holden, Consultation Paper, Demos, 28 February 2008, p.25

¹¹⁵ For further information go to www.ixia-info.com.

¹¹⁶ 'Lessons from PROJECT', Eric Holding and Fred Brookes in *Artists & Places*

required thinking, the number of stakeholders involved, the crystallisation of a shared, compelling vision, and the process of fully exploring and prioritising commitments to action place significant demands on a school which is still operating 'as normal'. PFS advice is to take plenty of time over it, and do the job thoroughly;¹¹⁷

- PFS recommends that a CSG is formed and begins its work 'as early as possible in order to maximise its value to the programme';¹¹⁸
- Organisations such as the Sorrell Foundation and the BCSE focus on enabling school staff and pupils to ask the right questions, training them to be skilled clients in order to achieve the desired answers;¹¹⁹
- RIBA and DCSF are in discussions regarding the creation of Continuing Personal or Professional Development (CPD) training for architects becoming involved with school design for the first time. This would prevent '...[the] risk that, as many more architects are drawn into the school design programme, experience of school design will be diluted or lost';¹²⁰
- In *Culture and Learning: Towards a New Agenda*, John Holden identifies that professional development projects such as REFLECT¹²¹ and the engage programme are starting to bring teachers and artists together so that they can better understand each other;¹²²
- Criminal Records Bureau (CRB) disclosures, CP's (now CCE) development of their 'Creative Agents'¹²³ and the Council for Learning Outside the Classroom's 'Quality Badge'¹²⁴ formalise and accredit the work and status of artists and provider organisations within schools.¹²⁵ In the case of the Quality Badge, it is important to note that it is currently only available to organisations, and there is a possibility that expanding this might disadvantage individuals, particularly self-employed artistic practitioners.¹²⁶

The role of public art expertise (artists, local authority public art officers, public art consultants, public art organisations) is recognised as an important part of the

¹¹⁷ *Schools' Strategy for Change: Guidance for schools and local authorities*, Partnerships for Schools (PFS), June 2009, 19-20. This document was informed by the Select Committee on Education and Skills' Seventh Report to the House of Commons in August 2007, *Sustainable Schools: Are we building schools for the future?* and by *Evaluation of Building Schools for the Future – 1st Annual Report*, PricewaterhouseCoopers LLP's first evaluation report on BSF, written in December 2007.

¹¹⁸ *Requirements and guidance on culture*, p.21

¹¹⁹ <http://www.thesorrellfoundation.com/bsf.html>

¹²⁰ 'BSF – are we making progress?', Andy Thompson and Chris French, *Education Business*. <http://www.educationbusinessuk.net/content/view/49/3/>. The CPD modules were scheduled to be trialled at the end of June 2009, to coincide with the BCSE Schools Week.

¹²¹ In REFLECT, 138 individuals from schools, the wider education sector, creative and cultural organisations and creative businesses were brought together for a collaborative learning opportunity enabling them to have the time and space to share, to reflect and to have focused creative conversations. Those from schools were matched with a co-mentor from a creative and cultural business or a freelance practitioner. REFLECT contributed to and learned from national policy debates on creativity, education and skills through National and Regional Advisory Groups.

¹²² *Culture and Learning: Towards a New Agenda*. John Holden, Consultation Paper, Demos, 28 February 2008, p.15

¹²³ The role of the CP Creative Agent is to work with the school leadership team in order to support the development of creative learning and contribute to school improvement. This is done by establishing a creative learning vision for the school that is closely linked to the school development plan and their role is to champion the value of creative teaching and learning. (<http://www.creative-partnerships.com/data/files/the-art-of-looking-sideways-96.pdf>)

¹²⁴ <http://www.lotcqualitybadge.org.uk/home>

¹²⁵ <http://www.lotc.org.uk/>

¹²⁶ ACE has been involved throughout its development, initially through the establishment of an Arts and Creativity Sector Partnership, then commissioning CapeUK to lead on the arts and creativity sector consultation and the subsequent follow-up work on the development of the Quality Badge. ('Badge of Learning', Sally Manser (CapeUK) in *Arts Professional*, 9 February 2009, p.7)

provision of public art: *'Artists in general lack professional support networks and artists in this unusual situation (collaborative working) even more so.'* In addition, *'organisations receiving the input of artists also need support, particularly when this is breaking new ground.'*¹²⁷ In general, existing local authority public art expertise can be found within either the cultural or planning departments. However, if experienced individuals cannot be identified in-house, local authorities appoint external public art expertise to develop and implement a vision, policy and strategy for public art across relevant services.

Where public art expertise is in place, there is a key variation in its roles. Whilst some project manage public art commissions within capital developments, others assist public and private sector organisations with the appointment of external public art expertise to undertake project management. Both approaches are used within the context of BSF and, in the case of the latter, the public art sector provides a number of options for managing public art commissions. These include publicly funded public art organisations, independent public art consultants and artists.¹²⁸

In some cases, public art expertise within local authorities has established steering groups to support its work and to assist with the overall promotion, implementation and evaluation of a public art vision, policy and strategy. Such a steering group can include: artists; arts professionals; design professionals; local politicians; local authority officers; representatives of local community groups and developers. As previously mentioned, PfS requires that CSGs are a mandatory part of local BSF programmes. If a general public art steering group exists within the local authority, its views can inform the work of the CSG (see 2.3.7). In addition, individual school steering groups are also set up to support the delivery of specific public art programmes and commissions. In Bristol, a Public Art Commissioning Group was established within each of the schools involved in the first phase of the city's BSF programme (see 2.3.3).

The review has found that it is a mistake to assume that all artists have sufficient skills and knowledge to enable them to work within the BSF process. Moreover, the client organisation recruiting the artist habitually assumes this is the case, yet subsequently fails to plan for a process of involvement and to provide the necessary training to facilitate this. To address this issue, public art expertise within local authorities can recruit additional expertise to assist artists with working alongside students, teachers, design and other professionals and additional stakeholders in the development of public art projects. As part of Somerset County Council's BSF programme (see 2.3.3), RiO led on the appointment of an architect to be their Lead Design Facilitator and to work alongside the Lead Artist Facilitator. Furthermore, public art expertise can also involve the organisations mentioned under section 2.3.2 of this document to help deliver public art programmes within the context of BSF. For example, Bristol City Council's Senior Public Art Officer worked with CP (now RiO) within Bristol's first BSF phase. A key reason for this was that, through earlier projects, CP (now RiO) had previously established relationships with the schools. Consequently, these schools were already receptive to, and experienced in, working with artists. Building on existing relationships is a means of managing the time pressures of the BSF process and avoiding over-loading school staff. In Birmingham, the

¹²⁷ PROJECT: Evaluation Report, p.42

¹²⁸ For further information go to: www.artscouncil.org.uk, www.architecturecentre.net and www.publicartonline.org.uk.

LSLP initiative grew out of their PPP2 schools improvement programme, the predecessor to BSF. This legacy meant that time was available for the City Council's Head of Arts Education and the public art expertise which had been appointed to engage with the schools to inform the BSF process.

A local authority itself is responsible for assigning the budget it will spend on its BSF Project Board and Team and is able to buy in any help it requires which cannot be found in-house. Consequently, it is possible for a budget to be committed to providing public art expertise and artists at the Pre-Initiation stage, at the inception of a BSF programme. As indicated in section 2.3.3, funding can also be found from other sources and from existing arts and public art initiatives which are already running locally.

2.3.10 In addition to public art commissioning being achieved through the BSF process, it can also be supported via other routes within the activities of local authorities and their partners. The inclusion of public art within BSF programmes is only one route through which local authorities are pro-active about commissioning public art. Their public art policies and strategies can also require the provision of public art from public and private sector developments via the local planning system; development briefs; land agreements; and Local Strategic Partnerships (LSPs).

2.3.11 BSF is subject to continuous review, resulting in change and uncertainty. Its delivery is being affected by the current economic downturn. As a result of PWC's *Annual Reports*,¹²⁹ and as BSF schools are being completed, lessons are being learned and both the BSF Process and standard documentation has been, and continues to be, subject to regular changes. Consequently, this advisory document looks at the BSF process as it stands and it will produce regular updates in order to keep the advice current.

It has been suggested that, as well as providing educational transformation, BSF is a vehicle for delivering the 21st Century social infrastructure required for regenerating communities.¹³⁰ However, whilst the government aimed to have two hundred BSF schools open by the end of 2008, only forty-two had been completed.¹³¹ The 2009 NAO report concluded that, in order to meet the target of finishing the programme's three and a half thousand schools by 2020, the number of schools in procurement and construction needs to double. It also found that the programme's total capital cost had increased from earlier estimates.¹³² Yet despite this, having reviewed the existing BSF programme timetable, PfS states that: *'we are ahead of our delivery schedule for the current financial year, and to date, no construction works or school openings have been delayed due to the current economic climate.'*¹³³ However, it has been suggested that the economic downturn has put the BSF programme at risk, as deals reliant upon PFI and borrowing from the banks have become more difficult to

¹²⁹ *Evaluation of Building Schools for the Future – 1st Annual Report*, PricewaterhouseCoopers LLP, Final report, December 2007; *Evaluation of Building Schools for the Future – 2nd Annual Report*, PricewaterhouseCoopers LLP, Final report, December 2008 and *Building Schools for the Future (BSF) Procurement Review: Executive Summary*, Partnerships for Schools (PfS) and PricewaterhouseCoopers LLP, May 2008

¹³⁰ *BSF as a Catalyst for Regeneration*

¹³¹ 'Warning over BSF crisis' in *Building Design*, 23 January 2009, p.3

¹³² *The Building Schools for the Future Programme: Renewing the secondary school estate*, Report by the Comptroller and Auditor General, The National Audit Office (NAO), HC 135 Session 2008-2009, 12 February 2009, p. 9, 20

¹³³ *Statement in response to the NAO Report by the Chief Executive of Partnerships for Schools*, Tim Byles, Partnerships for Schools (PfS) website, 12 February 2009 and *Insite: Partnerships for Schools. Quarterly. Winter 2008-2009*, Partnerships for Schools (PfS), 13 February 2009

assemble.¹³⁴ Consequently, at the close of 2008 and despite recommendations that the initial BSF phases should be lengthened to allow time for ‘visioning’,¹³⁵ the Chancellor announced BSF was to be fast-tracked, bringing money already allocated for new schools in 2010-11 forward a year.¹³⁶ By supporting PFI contracts, the government intends that BSF will play a vital role in sustaining the economy, kickstarting the construction industry and creating new jobs.¹³⁷ PfS’ Chief Executive, Tim Byles, pledged: “*The education programme is very important [to rebuilding the economy]. BSF is a large-scale programme that is predictable, goes across the country and is attracting investment.*”¹³⁸

¹³⁴ ‘Warning over BSF crisis’, p.3

¹³⁵ ‘BSF threatened by downturn’, in *Building Design*, 9 January 2009

¹³⁶ ‘100 local authorities in England will share £499 million of capital funding brought forward from 2010-11 to the coming financial year’ in ‘Triple boost for school building projects’, Greg Pitcher in *Construction News*, 12 March 2009

¹³⁷ In March 2009, £900 million of public spending was brought forward, with the intention that school modernisation projects could start twelve months early. (Schools Minister, Jim Knight, in ‘Triple boost for school building projects’, Greg Pitcher in *Construction News*, 12 March 2009). The government also injected £2 billion into a new infrastructure bank to support and deliver struggling PFI projects lacking finance, in an effort to keep the construction industry going (‘Darling launches lender to save building projects’, Nick Mathiason in *The Observer*, 1 March 2009).

¹³⁸ Tim Byles in ‘Triple boost for school building projects’, Greg Pitcher in *Construction News*, 12 March 2009

3. GUIDANCE ON PUBLIC ART AND THE BSF PROCESS

Introduction

In response to PfS' promotion of public art and having considered the other findings of this review, ixia has developed the following guidance regarding public art and BSF. The guidance combines the involvement of public art expertise and artists with the key stages of the BSF process. This guidance is based on ixia's interpretation of national advice (including documents produced by PfS and 4ps) and local experience of BSF. However, ixia is aware that the delivery of BSF programmes is subject to continuing amendments to national guidance as well as to local interpretations and variations.

Within this guidance, the following factors are assumed:

- a BSF Project Board and Team have been recruited to deliver the BSF programme locally;¹³⁹
- the mandatory CSG will be formed and linked to the Project Board, the Project Team and the LEP;
- the local authority has a public art policy, strategy and expertise in place;
- the local authority's public art expertise will lead on the appointment and management of artists to work with students, teachers and other stakeholders to prepare a Public Art Statement. Its requirements will be included within key BSF documents and its production will be funded by the local authority;
- the Public Art Statement will define public art as the process of artists engaging with the public realm. It will include requirements for the involvement of artists in providing buildings and spaces and in response to the learning and community activities of the schools, utilising the National Curriculum, ICT and the characteristics of the locations of the schools. The public artworks produced will be object- and process-based and permanent or temporary;
- that when preparing their bids, bidding PSPs will be expected to recruit public art expertise and artists to respond to the requirements of the Public Art Statement. The bidding PSPs will each fund the involvement of public art expertise and artists in preparing their bids and allocate funds for the further development, realisation, management and maintenance of public art if they are selected by the local authority and PfS as the winning bidder to form a LEP.

¹³⁹ The Project Board and Team and the time and resources needed to support the BSF programme are funded by the local authority, which is required to allocate and commit to a BSF procurement budget, a minimum of approximately £3-4 million, before it is able to enter the BSF programme. This is financed by the local authority or the individual schools, or a combination of the two.

Summary of the key stages of the BSF Process

The key stages are:

STAGE 1 - Pre-Initiation: Preparing for BSF

STAGE 2 - Readiness to Deliver (RtD) and Strategy for Change (SfC)

STAGE 3 - Outline Business Case (OBC)

STAGE 4 - Procurement Planning

STAGE 5 - Competitive Dialogue

STAGE 6 - Final Business Case (FBC)

STAGE 7 - Contractual and Financial Close

STAGE 8 - Construction

STAGE 9 - Non-Sample Schools

STAGE 10 - Occupation and Operation

These stages, and the inclusion of public art, are explained in detail below:

STAGE 1 - Pre-Initiation: Preparing for BSF

Once the BSF Project Board and Team have been established, their focus should be to develop a local BSF vision and relate this to their existing schools. This process should involve discussions with each school. The CSG should be formed and begin to work on ensuring that the arts, culture and cultural learning are integrated within the BSF programme. It should commence work on the Strategic and Facilities Audit and the provision of arts spaces within schools. This process should include understanding and embedding the local authority's public art policy and strategy within the BSF programme.

Prior to, or during Pre-Initiation, the local authority's public art expertise should lead on the appointment of artists to work with the BSF schools. The aim is to prepare a Public Art Statement which informs the preparation of the FAM, SfC, OBC, FSOS, ICTOS and SPA. The Statement should address the following issues:

- the vision, aims, objectives and evaluation of public art within the BSF programme;
- the process and financial requirements for public art integrated within the architecture and landscape architecture of the sample and non-sample schools, including the role of artists in defining DQIfS;
- the process and financial requirements to support temporary and permanent public art which supports the learning and community activities of the sample and non-sample schools and is not integrated within the architecture and landscape architecture of the schools;
- guidance to bidding PSPs regarding their appointment of public art expertise and artists to respond to the content of the Public Art Statement;
- the management and financial requirements for the maintenance and ongoing delivery of public art;

- the involvement of existing arts and public art initiatives in the development and implementation of the Public Art Statement;
- recommendations and guidance regarding public art to be included in the SPA for adoption by the LEP for future phases of BSF and other similar initiatives, for example PCP.

STAGE 2 - Readiness to Deliver (RtD) and Strategy for Change (SfC)

PfS invites local authorities to put forward a RtD submission.¹⁴⁰ It summarises the education strategy, the procurement strategy and the project governance of a BSF programme. Following this, local authorities are given a proposed date for their entry into the BSF programme. PfS works with them through this pre-engagement period to ensure they are effectively prepared prior to a Remit Meeting and the signing of a Memorandum of Understanding, which marks their formal entry into the BSF programme and confirms PfS' and the local authority's mutual obligations and respective roles and responsibilities in delivering BSF.

At this stage, a completed FAM reflecting the scope of works for each school in the Wave should be approved by PfS prior to submitting the SfC. The FAM establishes an indicative level of government funding for the schools in the form of capital grants for D&B and ICT contracts, and PFI credits for PFI contracts.

The SfC ties together a local authority's education vision with the development of specific schools. As an appendix to the SfC document, each participating school is required to produce a SSfC. The SSfC sets out their ambitions for transforming secondary education, promoting higher standards and achieving success for all students, and supporting the delivery of the local authority's objectives and remit. It is developed in light of the school's own physical and educational needs and circumstances. The indicative level of government funding generated by the FAM is reviewed in response to the details provided by the SfC and SSfCs.

In addition, the SfC should refer to a local authority's corporate initiatives and documents, for example its Local Strategic Partnership (LSP),¹⁴¹ Local Area Agreement (LAA),¹⁴² Community Strategy,¹⁴³ and Local Development Framework (LDF).¹⁴⁴ The CSG should ensure that any cultural and public art policies and strategies are included in the RtD and acknowledged by the FAM. The SfC should contain references to the Public Art Statement and SSfCs should be informed by the production of the Public Art Statement.

STAGE 3 - Outline Business Case (OBC)

Once the SfC has been approved by PfS and DCSF, the OBC must be completed to gain formal approval to move into the appointment of a PSP, the creation of a LEP and the development of the schools.¹⁴⁵ The OBC furthers the work done in the development

¹⁴⁰ *BSF: Readiness to Deliver: Guidance for Local Authorities in BSF Waves 7 and beyond*, Partnerships for Schools (PfS), February 2009, http://www.partnershipsforschools.org.uk/documents/Readiness_to_deliver_Feb2009.pdf

¹⁴¹ For further information about LSPs, please refer to the Glossary.

¹⁴² For further information about LAAs, please refer to the Glossary.

¹⁴³ For further information about Community Strategies, please refer to the Glossary.

¹⁴⁴ For further information about LDFs, please refer to the Glossary.

¹⁴⁵ *BSF: Outline Business Case: Guidance (For approval to procure a LEP to deliver investment in the Secondary School Estate)*, Partnerships for Schools (PfS), April 2007 and *BSF: Outline Business Case: PfS approval process*, Partnerships for Schools (PfS), January 2008,

of the SfC, looking at what is achievable and affordable in the local BSF programme. It finalises the physical scope, ICT, costs, affordability, risks, procurement routes (PFI or D&B) and the timetable for the development of the schools. It fixes the level of funding identified in the FAM and required from the government and a programme of when the local authority will draw down the funding to enable the LEP to develop the sample and non-sample schools.

It is a requirement that all BSF schools should engage with the DQIfS process. During the OBC stage, the local authority should introduce DQIfS to all the schools, but particularly to the sample schools as their DQIfS FAVE reports (FAVE - features that are Fundamental, Add Value and contribute to Excellence in a design) will form part of the FSOS.¹⁴⁶

Once the OBC is complete, it is submitted to PfS and the DCSF for approval. As the OBC is being prepared, outline planning applications for the sample and non-sample schools are submitted to the local planning authority. If approved, outline planning applications are eventually followed by either reserved matters or full planning applications which contain the design and other details of the schools.

The Public Art Statement should be included with the OBC, and particular reference should be made to the involvement of artists in defining DQIfS. In addition, planning obligations and/or planning conditions relating to and securing the delivery of the Public Art Statement should form part of the planning permissions for the schools. For example, these could fix a sum to secure temporary public art and request that conceptual and material details of public art integrated within the fabric of a school's buildings and spaces be submitted to the local planning authority as part of the reserved matters or full planning application.¹⁴⁷

STAGE 4 - Procurement Planning

At this stage, the documentation needed to publish a 'notice' (advertisement) in the Official Journal of the European Union (OJEU), a requirement for all European contract tenders above a certain value, needs to be prepared.¹⁴⁸ Procurement planning will often take place in tandem with the development and approval of the OBC but the OJEU notice cannot be published until the OBC and documents relating to the Invitation to Participate in Dialogue (IPD) have been completed by the local authority and approved by PfS. The IPD is described below in Stage 5.

Following the publication of an OJEU notice, the local authority will evaluate expressions of interest and aim to identify three bidding PSPs based on a Statement of Requirements (SOR) and a Pre-Qualification Questionnaire (PQQ).¹⁴⁹ These are designed to establish whether potential bidders have the technical capacity and ability, the economic and financial standing and the partnering experience to deliver the project.

http://www.partnershipsforschools.org.uk/documents/BSF_Guidance_Documents/OBCNewApprovalProcessJanuary2008.pdf

¹⁴⁶ BSF: *Outline Business Case*, p.7

¹⁴⁷ For further information regarding public art and the planning system visit ixia's website: <http://www.ixia-info.com/research/the-planning-system-and-process/>

¹⁴⁸ OJEU Contract Notice, Publication of Supplement to the Official Journal of the European Union, June 2009 and BSF: *Guidance Note: Guidance on the completion of the BSF standard form Official Journal of the European Union Contract Notice (OJEU Notice) - Relating to the BSF standard form OJEU Notice*, Partnerships for Schools (PfS), June 2009

¹⁴⁹ BSF: *Pre-Qualification Questionnaire*, Partnerships for Schools (PfS), November 2008

Within the OJEU notice, local authorities should state the services they require the LEP to provide. Their appointment of public art expertise and artists should be included here as a prompt to satisfy the requirements stated in the Public Art Statement.

STAGE 5 - Competitive Dialogue¹⁵⁰

The purpose of the Competitive Dialogue stage is to identify which of the three bidding PSPs can best meet the local authority's needs and objectives for their BSF Programme.

This stage consists of the following phases:

- **Dialogue Phase 1 – Long-Term Relationships (20 weeks - 3 bidders)**

- **Invitation to Participate in Dialogue (IPD) Phase 1**

Once the three bidders have been selected, the Invitation to Participate in Dialogue (IPD) is issued by the local authority.¹⁵¹ It is based on the SfC and the OBC and includes: guidance regarding the production and submission of bids; draft agreements relating to the formation and work of the LEP, including the SPA which defines the services the LEP will provide to the local authority;¹⁵² the FSOS for each of the sample schools;¹⁵³ and an ICTOS. During this first stage of Competitive Dialogue, bidders are invited to demonstrate their ability as a partner in a LEP. They also submit outline designs for the two sample schools, which are created in response to the FSOS and ICTOS.

Following the evaluation of the IPD Phase 1 submissions, the local authority reduces the number of bidding PSPs to two, who then proceed to the second phase of dialogue.

- **Dialogue Phase 2 - Detailed Proposition (26 weeks - 2 bidders)**

- **Invitation to Participate in Dialogue (IPD) Phase 2**

Through this second phase, the local authority continues to work with the two bidding PSPs. This involves developing detailed designs for the two sample schools before final bids are requested by the local authority.

- **Invitation to Submit Final Tender (ISFT)**

This is a final round of negotiation and fine-tuning of the proposed schools as the Competitive Dialogue stage is concluded.¹⁵⁴ After further evaluation of the bids by the local authority it leads to the identification of a preferred bidder.

The local authority and PfS evaluate the bids by applying evaluation criteria. In general, variations of the followings headings are used to organise evaluation criteria: LEP Partnership; PFI sample school design; D&B sample school design; ICT; Legal and

¹⁵⁰ *BSF Guidance Note on How to Conduct a Competitive Dialogue Procedure*, Partnerships for Schools (PfS), January 2006. For further information about the Competitive Dialogue stage, see Appendix 2: the A-Z Glossary of BSF Terms.

¹⁵¹ *BSF Template: Invitation to Participate in Dialogue (IPD) (Volume 1 - Instructions and Guidance to Bidders)*, Partnerships for Schools (PfS), November 2008 and *IPD Descriptive Document*, Partnerships for Schools (PfS), November 2008

¹⁵² *Standard Form: Building Schools for the Future: Strategic Partnering Agreement*, Partnerships for Schools (PfS), November 2008

¹⁵³ *BSF Standard Document: Draft Template: Facilities and Services Output Specification*, Partnerships for Schools (PfS), November 2008

¹⁵⁴ *BSF Template: Invitation to Submit Final Bids – Instructions and Guidance to Bidders*, Partnerships for Schools (PfS), November 2008

Commercial; and Financial.¹⁵⁵ Different local authorities give different weightings to evaluation criteria, but are subject to PfS guidance on this.

In order for there to be a mandatory and contractual obligation for bidding PSPs to address and deliver public art as part of the bidding process, requirements and measurable outputs taken from the Public Art Statement should be included within the IPD, in particular the SPA, FSOS and ICTOS. It is at this stage that public art expertise and artists should be working for the bidding PSPs and responding to these requirements and outputs.

In addition, the local authority's criteria for assessing the bids made by the PSPs should also include public art. DQIfS, CABE's MDS, ixia's Evaluation Toolkit, and criteria relating to the development of students, staff and other stakeholders should be used to inform the evaluation of public art proposed by the bidding PSPs.

STAGE 6 - Final Business Case (FBC)

Following the selection of a preferred PSP, a local authority works with this PSP to finalise the details of their bid.¹⁵⁶ The local authority is required to submit a FBC to PfS and DCSF as evidence that the procurement has delivered the objectives set out in the SfC and the OBC. The FBC also sets out the SPA for the LEP and forms the basis for the approval of government funding for the BSF programme. Furthermore, after a PSP has been selected and as the FBC is being prepared, reserved matters or full planning applications for the sample schools are submitted to the local planning authority for approval.

Details regarding the provision of public art by the LEP should be included within the FBC. As mentioned previously, they should also be included within the reserved matters or full planning applications for the schools, and their final delivery should be secured through the use of planning obligations or planning conditions by the local planning authority.

STAGE 7 - Contractual and Financial close

Once approval has been granted for government funding and planning permissions have been obtained, the local authority, PfS and the PSP form the LEP and the LEP and local authority sign the SPA.

All the requirements for the provision of public art within the sample and non-sample schools have been put in place by this stage.

STAGE 8 - Construction

The LEP constructs the sample schools in accordance with the requirements of the FSOS included in the PFI and D&B contracts and ICT contracts and using an approved chain of suppliers.

¹⁵⁵ *BSF – Initial and Final Bids – requirements, document deliverables and evaluation overview*, Partnerships for Schools (PfS), November 2008 and *BSF Template: Volume 1 Section K - IPD Initial Bid Checklist*, Partnerships for Schools (PfS), November 2008

¹⁵⁶ *BSF: Final Business Case Guidance (For approval to procure a LEP to deliver investment in the Secondary School Estate)*, Partnerships for Schools (PfS), January 2007

At this stage the public artworks integrated into the schools' buildings and spaces are delivered and the implementation of public artworks supporting learning and community activities are continued. The public art expertise, artists and their sub-contractors should be recognised as part of the supply chain.

STAGE 9 - Non-Sample Schools

In accordance with the SfC, OBC, the generic aspects of the FSOS, the ICTOS and the SPA, the local authority and the LEP engage the non-sample schools in detailed discussions about their development. This includes the development of school-specific DQIfS. Details are then submitted to PfS and DCSF for approval which, if granted, secures the allocation of funding for the schools via a capital grant or PFI credits. The schools' requirements form the basis of D&B or PFI contracts and ICT contracts, and the construction process begins using the LEP's approved chain of suppliers.¹⁵⁷

The inclusion of the requirements of the Public Art Statement within the SfC, OBC, the generic aspects of the FSOS, the ICTOS and the SPA should ensure that public art expertise and artists are involved in the development and the construction of the non-sample schools.

STAGE 10 - Occupation and Operation

Once the sample and non-sample schools have been built and are in use, outcomes are assessed against the BSF programme's planned objectives. Post-Occupancy Evaluation gauges satisfaction with both the buildings and any services (for example cleaning and maintenance) delivered through BSF and assesses actual outcomes from BSF programmes so that best practice and lessons learned can be fed back into the BSF process and programmes at a national and local level.¹⁵⁸

The maintenance of public art which has been provided through the construction of a school and any requirements to support post-occupation and ongoing public art projects should be identified within the FM programme. If the school was built using a PFI contract then the FM is managed by the PSP. If a D&B contract was used, the FM is managed by the local authority and/or the school. ICT is maintained by a selected specialist provider who is usually part of the LEP.¹⁵⁹

¹⁵⁷ BSF: Stage 0 Submission Guidance: (For agreement to proceed with Non-Sample schools (second & subsequent phases) in a previously approved Wave of investment in the Secondary School Estate), Partnerships for Schools (PfS), February 2008 and BSF: Guidance on the DCSF/PfS Approvals Procedure for New Projects: (Stage 0 and OBC interface with SPA requirements), Partnerships for Schools (PfS), February 2008

¹⁵⁸ BSF: Guidance on the DCSF/PfS Approvals Procedure for New Projects

¹⁵⁹ An Introduction to Building Schools for the Future, 4ps, Department for Children, Schools and Families (DCSF) and Partnerships for Schools (PfS), 2008, p.39

APPENDIX 1: GLOSSARY

4ps (Public Private Partnership Programme): 4ps is local government's partnership and project delivery specialist. 4ps works in partnership with all local authorities to secure funding and accelerate the development, procurement and implementation of PFI schemes, public private partnerships, complex projects and programmes. It supports a local authority's delivery of the BSF programme through its Expert Client Programme and Gateway Reviews. <http://www.4ps.gov.uk/>

Academies: Academies are independently managed schools for pupils of all abilities. Delivery of the Academies Programme was allocated to PfS by the DCSF in March 2006. It aims to establish four hundred Academies in England, two hundred of which will be open or in development by 2010. Academies are procured through the LEP or, in areas not enveloped by the LEP, a national procurement process for Academies which became operational in January 2007. <http://www.partnershipsforschools.org.uk/about/aboutacademies.jsp>

Architecture Centres: There is a growing network of independent Architecture Centres around the country, many of which are funded through CABE's regional funding programme and are members of ACN. Architecture Centres work for the creation of better quality neighbourhoods, buildings and public spaces across the UK. They achieve this through participation, advocacy and education. There are twenty-two Architecture Centres in the UK.

Architecture Centre Network (ACN): ACN is the national umbrella body and the development and advocacy organisation for the twenty two Architecture Centres in the UK. ACN is funded by ACE and CABE to promote joint working and knowledge sharing amongst the centres. <http://www.architecturecentre.net/docs/home/>

ARTS alive!: ARTS alive! is the outcome of a Qualifications and Curriculum Authority's (QCA) curriculum development project set up to identify ways in which the contribution of the arts to pupils' education can be maximised. It is designed for use by headteachers, arts subject leaders, school governing bodies and practitioners, arts organisations and supporting businesses. <http://www.qca.org.uk/artsalive/>

Arts Award: Arts Award supports young people to develop as artists and arts leaders and is available throughout England. The Award develops and assesses both arts-related and transferable skills such as creative thinking, communication, planning and teamwork. It is run by ACE and Trinity Guildhall and is a nationally recognised qualification at three levels: Bronze; Silver; and Gold. <http://www.artsaward.org.uk/site/>

Arts Council England (ACE): ACE is the national development agency for the arts in England, funded by the government. Its national office has appointed a part-time BSF Culture post, part-funded by PFS, to advocate culture and the arts as part of BSF initiatives. <http://www.artscouncil.org.uk/>

BREEAM (Building Research Establishment Environmental Assessment Method): BREEAM assesses the environmental performance of building design in the following areas: management; energy use; health and well-being; pollution; transport; land use; materials; and water. Schools in BSF are required to meet or exceed the BREEAM 'very good' standard. <http://www.breeam.org/>

British Council for School Environments, The (BCSE) – previously SchoolWorks: BCSE is a membership organisation made up of public and private sector organisations including schools, local authorities, construction companies and architects. It acts as a forum for exchange, dialogue and advocacy for anyone interested in learning environments. BCSE recognises BSF's investment in education

as an opportunity to design and deliver buildings capable of supporting new visions for teaching and learning, children's services and the increasing community use of schools. It researches, communicates and develops best practice in all aspects of school design and construction. <http://www.bcse.uk.net/> and <http://www.school-works.org/>

Building Bulletin 77: Designing for Pupils with Special Educational Needs and Disabilities in School (BB77): A government (DCSF) document which sets out guidelines for designing school buildings and grounds for pupils with special educational needs in both mainstream and special schools. It includes guidance on how schools and local authorities should develop the brief and the design criteria for a secondary school with different types of special needs.

Building Bulletin 98: Briefing Framework for Secondary School Projects (BB98): A government (DCSF) document which sets out area guidelines for secondary school buildings and grounds and includes guidance on how schools and local authorities should design schools.

Building Schools for the Future (BSF): The government is promoting BSF as the biggest single capital investment programme in schools in England in fifty years.¹⁶⁰ Launched by the DCSF in 2004, it relies on partnerships between the public and private sectors and aims to rebuild or refurbish all of England's three thousand five hundred state secondary schools where there is need over the next fifteen years, by 2023. It is envisaged not just as a school buildings programme but hopes to achieve a wider educational transformation effect, engaging and inspiring teachers, pupils and communities through the union of new/refurbished buildings with new technologies and creating the environment for the government's agenda of educational transformation.

<http://www.partnershipsforschools.org.uk/about/aboutbsf.jsp>.

CABE Enabler: A CABE Enabler is assigned to each local authority as it enters the BSF process in order to establish early awareness of good design, appoint a RIBA CDA and support the BSF programme and CDA.

<http://www.cabe.org.uk/enabling/enablers-and-advisors>

Capital Grants: Government grants for capital expenditure and to encourage the acquisition of capital assets such as buildings and land.

Change Schools: Part of the CP programme, run by CCE, Change Schools intends to bring about sustainable change in approaches to teaching and learning. Participating schools need to demonstrate a commitment to putting creativity at the heart of their improvement plans and to educating young people for a creative future. Successful projects have involved a variety of creative professionals including architects, designers and artists. <http://www.creative-partnerships.com/programmes/change-schools/>

Children and Young People's Plan (CYPP): The government requires every local authority to produce a single, strategic plan for all local services for children and young people. It must be produced jointly by the local authority and all its relevant partners to co-ordinate integrated and effective services and sets out the local authority's intentions for delivering *The Children's Plan* ambitions and the five *ECM* outcomes.

Children's Plan, The: *The Children's Plan: Building brighter futures* is a ten-year strategy setting out how the government intends to improve schools and other services for children and young people, focusing on health and well-being; safety;

¹⁶⁰ www.partnershipsforschools.org.uk/about/aboutbsf.jsp

education and training; and success and the creation of opportunities. It was announced on 11th December 2007. <http://www.dcsf.gov.uk/childrensplan/>

Client Design Advisor (CDA): Local authorities in the BSF programme are required to have a CDA to advise the client team on all aspects of design for each BSF school – to guide clients through the process of commissioning buildings in order to help achieve high-quality buildings and environments and to maximise the value and quality of their projects. The CDA is commissioned and paid for directly by the local authority to terms that are agreed as a bespoke package of services. They advise the client team on briefing, design, delivery and usage. The CDA champions design quality and whilst required to act from the inception of a BSF project through to its completion, it can also be used by local authorities at the visioning stage in the run-up to the BSF bidding process. The CABE Enabler helps the local authority to recruit the CDA. <http://www.cabe.org.uk/publications/bsf-client-design-advisor>

Commission for Architecture and the Built Environment (CABE): CABE is the government's advisor on architecture, urban design and public space and was established to encourage a high quality of architectural design in public buildings and spaces. It is the advisory body to the BSF programme on design issues, funded by DCSF to support local authorities with design Enablers and the Schools Design Panel. <http://www.cabe.org.uk/>

Community Strategy: Under the 2000 Local Government Act, local authorities must prepare a Community Strategy for promoting or improving the social, economic and environmental well-being for their area. Community Strategies are intended to bring together all those who can contribute to the future of communities within a local authority area, to agree on the key priorities for the area and pursue them in partnership.

Competitive Dialogue Stage: Competitive Dialogue is a European Union public-sector tendering mechanism. It is designed to provide flexibility in the procurement process for more complex contracts and to allow bidders to submit competitive bids in response to a client's requirements. Competitive Dialogue aims to increase value by encouraging innovation and maintaining competitive pressure in bidding for complex contracts. Within BSF, this stage identifies which bidding PSP can best meet the local authority's needs and objectives for their BSF Programme.

Construction Industry Council (CIC): The CIC is a non-profit making body concerned with all aspects of the built environment. It is a representative forum for professional bodies, research organisations and specialist business organisations in the construction industry. The DQIFS is managed by the CIC. <http://www.cic.org.uk/>

Creative Partnerships (CP): CP has been running since 2002 and has worked with over 2,700 schools across England, from Key Stage 1 to Key Stage 4. It is the government's flagship creative learning programme, delivered by CCE and designed to develop the skills of young people across England, raising their aspirations and achievements, and opening up more opportunities for their futures. The programme supports long-term partnerships between schools and creative professionals including artists and is delivered through a range of organisations who administer the programme locally. <http://www.creative-partnerships.com/>

Creativity, Culture and Education (CCE): CP was set up in 2002 by ACE as the government's flagship creative learning programme to help young people discover their creative talents, develop skills, raise their aspirations and achievements, and open up more opportunities for their futures. For 2009-11 it has become CCE, an independent organisation with a £75m grant. It runs two national initiatives: the Creative Partnerships Programme,¹⁶¹ the government's flagship learning creative

¹⁶¹ <http://www.creative-partnerships.com/>

programme, and *Find Your Talent*,¹⁶² the government's pilot cultural offer.
<http://www.creativitycultureeducation.org/>

Cultural Stakeholder Group (CSG): PfS has made the CSG a mandatory requirement for all local authorities entering the BSF programme from Wave 7 onwards, which will ensure that the championing of culture and cultural learning is a formal and mandatory part of the BSF process. The CSG is led by a Culture Workstream Lead and includes a range of individuals with a strategic, local authority-wide overview across a range of areas from culture and the arts to children's services and community delivery. Its work should also be informed by arts and cultural organisations. Its role is to guide the BSF Project Board and Team and the LEP on the integration of the arts, culture and cultural learning within a BSF programme. The CSG's work includes advising on the provision and management of arts spaces within BSF schools and undertaking a Strategic and Facilities Audit in order to assess and develop links between BSF and existing and emerging arts and cultural organisations and initiatives, including the provision of public art.

Culture Workstream Lead: All local authorities are required to nominate a Culture Workstream Lead as part of the BSF Project Board and Team. It is their responsibility to: act as a champion for culture throughout the BSF process; set up and lead the CSG; chair the CSG meetings; broker partnerships and dialogues; regularly review the progress of culture within the BSF programme; influence and negotiate with key partners to ensure effective outcomes for culture; and link to the LSP.

Department for Children, Schools and Families, The (DCSF): The DCSF is the British government department created in June 2007 after the disbanding of the DfES. It is responsible for all issues affecting people up to the age of 19, including education, and for delivering the government's commitment to enabling all children and young people to reach their full potential. The DCSF holds responsibility for policy, strategy and funding for BSF and in 2004 established PfS to manage and deliver the BSF programme. <http://www.dcsf.gov.uk/>

Design and Build (D&B): A contract and procurement route in which a single contractor is responsible for both the design and the construction of a building project. Within BSF a local authority prepares a performance specification for the building works and the LEP responds to these requirements. D&B is the standard delivery route for delivering building works to schools that are being refurbished or remodelled (a combination of some new build work and refurbishment). Once the school is built, the operating costs will be covered by the school's budget.

Design Quality Indicators for Schools (DQIfS): DQIfS was launched in 2005 and is a method of evaluating the design and construction of new school buildings and the refurbishment of existing buildings. It is a process that actively involves stakeholders and the school community in the design of school buildings and can be used at all stages of a building's development: 1) Preparation; 2) Design; 3) Pre-Construction; 4) Construction; and 5) Use. It is managed by the CIC.
<http://www.dqi.org.uk/Schools/>

Diploma: A new qualification for 14-19 year olds. There will be ten subjects by September 2009, increasing to seventeen by 2011. The subject areas include 'Construction and the Built Environment' and 'Creative and Media'.
<http://yp.direct.gov.uk/diplomas/>

engage: engage is a membership organisation which promotes access to, and enjoyment and understanding of the visual arts through gallery education - projects and programmes which help school children and the wider community become

¹⁶² <http://www.findyourtalent.org/>

confident in their understanding and enjoyment of the visual arts and galleries. Its 'enquire' programme was the largest systematic review in England to focus on how children and young people can learn through galleries, contemporary art and artists. <http://www.engage.org/home/index.aspx>

Every Child Matters (ECM): *ECM* is the government's shared programme of change to improve outcomes for all children and young people. It sets out five outcomes that matter most to children and young people: being healthy; staying safe; enjoying and achieving; making a positive contribution; and achieving economic wellbeing. *ECM* is underpinned by the *Children Act 2004* and its agenda has been further developed through publication of *The Children's Plan* in December 2007. www.dcsf.gov.uk/everychildmatters/

Expressions of Interest (Eoi): An Eoi lists the order and scope of a local authority's proposed BSF projects. It sets out their strategic plans for the delivery of secondary education transformation in the area, grouping schools into geographically coherent projects and detailing the reasons for prioritisation. It includes an Excel file showing each project in prioritised order and details of the schools. All local authorities had to submit an Eoi in 2003. Local authorities with BSF projects in Waves 7 to 15 had to revise and resubmit these in a new format to PfS by 30th November 2008. On 2nd March 2009, the DCSF published a revised national programme for BSF based on the revised Eois: www.partnershipsforschools.org.uk/programme/progress.jsp

Extended Schools: A government policy for increasing the community focus and use of school buildings, achieved through the dual use of existing facilities and/or the co-location of other public services on school sites. BSF is intended to encourage and facilitate the provision of Extended Schools.

Facilities and Services Output Specifications (FSOS): Output Specifications are now called the FSOS. The FSOS is a detailed description of the functions that the new accommodation must be capable of performing, usually split into building functions and service functions. It provides contractors with: an introduction to the BSF programme; indicates the local authority's buildings, service provision and educational transformation requirements; provides local, school-specific information; and details how contractors' proposals will be evaluated and interpreted. The FSOS comprises four Briefs plus four Annexes. The four Briefs are: the Educational Brief; the Design Brief; the Furniture and Equipment (F&E) Brief; and the FM Services Brief. Each Brief has two parts. Part 1 specifies the local authority-wide requirements for the two sample schools. Part 2 sets out school-specific requirements for each school. The four Annexes contain the: national Statutory Requirements and Guidelines; Local Authority Policy Requirements; Construction [and Compliance] Information; and Schedules of Accommodation and Area Data Sheets. To avoid being restrictive, the FSOS should state only the outputs required and not the way in which the contractor will achieve these. In May 2009, the draft version of the revised FSOS for local authorities in Wave 5 onwards was made available on the PfS website, and the final version will be available during 2009.¹⁶³

Facilities Management (FM): In PFI, this generic term is used to cover all the day-to-day aspects of managing and operating buildings, their systems, equipment and furniture. 'Hard FM' covers the costs and responsibilities of maintaining the buildings themselves. 'Soft FM' relates to the costs of ancillary building services such as cleaning and grounds maintenance.

Final Business Case (FBC): Following the selection of a preferred PSP, a local authority works with the PSP to finalise the details of their bid. The local authority is required to submit a FBC to PfS and DCSF as evidence that the procurement has

¹⁶³ http://www.partnershipsforschools.org.uk/library/bsf_standard_docs.jsp#OutputSpecification

delivered the objectives set out in the SfC and the OBC. The FBC also sets out the SPA for the LEP and forms the basis for the approval of government funding for the BSF programme. Furthermore, after a PSP has been selected and as the FBC is being prepared, reserved matters or full planning applications for the sample schools are submitted to the local planning authority for approval.

Find Your Talent: In February 2008, the government announced that all school children should be offered a minimum of five hours of high quality culture a week, a commitment set out in *The Children's Plan*. A £25 million *Find Your Talent* scheme, managed by CCE, is currently being piloted in ten pathfinder areas across England and is seeking to '*encourage young people to participate in cultural activities*', offering them regular access to and involvement with arts and culture, both in and out of school.¹⁶⁴ www.findyourtalent.org/

Full Planning Application: A full planning application is made when a defined scheme has been developed. This would typically include detailed building and public realm designs and details of means of access to the site and buildings that are proposed.

Funding Allocation Model (FAM): PfS allocates each local authority within a BSF Wave with a funding 'envelope' for a group of schools. This is a whole life cost model which calculates BSF capital funding allocation using the FAM, an Excel spreadsheet which works out an overall funding envelope based on the recommended gross floor areas and the agreed projected number of pupils for the schools in that Wave. The model is designed so that a local authority will be able to change the inputs to explore different delivery options (such as new build, remodelling, etc) or to get a more accurate assessment of final funding allocation. A completed FAM reflecting the scope of works for each school in the Wave should be approved by PfS prior to submitting the SfC. The FAM establishes an indicative level of government funding for the schools in the form of capital grants for D&B and ICT contracts, and PFI credits for PFI contracts.
www.partnershipsforschools.org.uk/documents/BSF_Guidance_Documents/Funding_AllocationModel.xls

Information & Communications Technology (ICT): In the context of BSF, ICT is the provision of a managed ICT service to schools by the LEP. The **Information and Communication Technology Output Specification (ICTOS)** details the local authority's and the schools' ICT needs within the IPD, which the LEP is expected to provide and manage.

Invitation to Participate in Dialogue (IPD) Phase 1: The document which invites the three bidders who have pre-qualified to participate in the Competitive Dialogue stage. It is based on the SfC and the OBC and includes: guidance regarding the production and submission of bids; draft agreements relating to the formation and work of the LEP, including the SPA which defines the services the LEP will provide to the local authority; the FSOS for each of the sample schools; and an ICTOS. Bidders need to demonstrate their ability as a partner in a LEP and to submit outline design solutions for the two sample schools.

Invitation to Participate in Dialogue (IPD) Phase 2: A shortlist of two bidders is agreed by the local authority based on the evaluation of the submitted outline solutions. Bidding PSPs are asked to develop detailed solutions and designs for the two sample schools before final bids are requested by the local authority. They also need to demonstrate how they will manage the LEP and deliver the FM.

Invitation to Submit Final Tender (ISFT): This is a final round of negotiation and fine-tuning of the proposed solutions as the Competitive Dialogue is concluded. This

¹⁶⁴ <http://www.findyourtalent.org/>

leads to the identification of a preferred bidder. A LEP is formed, consisting of the local authority, PfS and a PSP – the winning bidder.

Learning Through Landscapes (LTL): LTL is the national school grounds charity, established in 1990 to promote the use of school grounds to enhance schools and educational outcomes. www.ltl.org.uk

Local Area Agreement (LAA): LAAs set out the priorities for a local area agreed between central government, a local area (the local authority and LSP) and other key stakeholders at the local level. They are intended to: simplify central funding; facilitate effective, joined-up public services; and allow greater flexibility for local solutions to local circumstances.

Local Development Framework (LDF): The LDF replaces the previous system of County level Structure Plans and District level Local Plans, and Unitary Development Plans for Unitary authorities. An LDF is a folder of documents which must include a Local Development Scheme, Local Development Documents, a Statement of Community Involvement and an Annual Monitoring Report. The LDF can also include Supplementary Planning Documents which replace Supplementary Planning Guidance.

Local Education Partnership (LEP): BSF is being delivered by a new type of Public Private Partnership known as a LEP, the bespoke delivery vehicle for a local BSF programme within a defined geographical area. It is a public private partnership in which a private sector consortium (possessing the skills and services required to deliver the local authority's vision) comes together in a formal partnership with the local authority and PfS after Financial Close. Through the LEP, the local authority is able to procure wider local services beyond secondary schools, including primary schools, healthcare and leisure facilities. The LEP enters into a SPA with a local authority and is given exclusive rights as the procurement and service provider to deliver the projects in an area for a fixed period, usually about ten years, which is subject to extension.

Local Strategic Partnership (LSP): A LSP is a partnership which brings together, at a local level, the public, private, business, community and voluntary sectors so that different initiatives and services support each other and work together. It provides a single overarching local co-ordination framework within which other partnerships can operate and is responsible for developing and driving the implementation of Community Strategies and LAAs.

Memorandum of Understanding (MoU): An agreement, signed by the local authority and PfS, that confirms mutual obligations and the respective roles and responsibilities in delivering BSF locally and nationally. It is signed before the local authority formally enters the BSF programme.

Minimum Design Standard (MDS): The MDS for BSF, jointly developed by the DCSF, PfS and CABE, is a tool for the review of sample schools, in particular those with a significant proportion of new build. The MDS is set by CABE and administered by the Schools Design Panel. Schemes are assessed against ten criteria using a four-point scale: 'very good', 'pass', 'unsatisfactory', and 'poor'. Only schemes with overall design quality ratings of 'very good' or 'pass' can proceed through procurement to construction. It is intended to encourage bidders, architects and contractors to strive for the very best in transformational school design. The MDS will apply to all BSF projects and will be a requirement of every OJEU notice. <http://www.cabe.org.uk/design-review/schools/minimum-design-standard>

National Curriculum, The: Within the broader school curriculum, the National Curriculum secures an entitlement to a number of areas of learning for all pupils. Its intention is to ensure that every young person develops the knowledge,

understanding, skills and attitudes necessary for their self-fulfilment and development as active and responsible citizens. It also seeks to make expectations for learning and attainment explicit to pupils, parents, teachers, governors, employers and the public, and establishes national standards for the performance of all pupils in the subjects it includes. <http://curriculum.qca.org.uk/>

Non-sample Schools: Non-sample schools are the remaining schools in a local authority's BSF programme and can involve any number of schools. The LEP builds the sample schools first and, subsequently, the non-sample schools in accordance with the programme agreed with the local authority, PfS and DCSF.

Office for Standards in Education, Children's Services and Skills, The (Ofsted): Ofsted inspects and regulates the care of children and young people, and education and skills for learners of all ages in England. www.ofsted.gov.uk

Official Journal of the European Union (OJEU) - formerly the OJEC: The journal in which the notice or tender to the market for BSF schemes must be placed once the OBC has been approved.

Official Journal of the European Union (OJEU) Notice: A notice (advertisement) which must appear in the OJEU Journal inviting tenders for all European contracts above a certain value.

Official Journal of the European Union (OJEU) Process: In accordance with the European Procurement Directive, all contracts that have an estimated total value above their respective EU threshold for supplies, services and works must be advertised in the OJEU. This process enables a competitive dialogue procedure to open up the public procurement market, ensuring the free movement of goods and services within the EU.

Outline Business Case (OBC): Once the SfC has been approved, the OBC must be completed to gain formal approval to move into the appointment of a PSP, the creation of a LEP and the development of the schools. The OBC furthers the work done in the development of the SfC, looking at what is achievable and affordable in the local BSF programme. It finalises the physical scope, ICT, costs, affordability, risks, procurement routes (PFI or D&B) and the timetable for the development of the schools. It fixes the level of funding identified in the FAM and required from the government and a programme of when the local authority will draw down the funding to enable the LEP to develop the sample and non-sample schools. Once the OBC is complete, it is submitted to PfS and the DCSF for approval before the project is allowed to enter procurement.

Outline Planning Application: Outline planning applications are prepared when a vision for a site is established without a detailed scheme in place. Outline planning applications enable the applicant and a local authority to establish an agreement 'in principle' to the development, without the developer being committed to a particular form of design or layout. Planning permission is granted subject to the subsequent approval of reserved matters. The issues that need to be approved at one of the two stages of the process (outline or reserved matters) are: the use of buildings and spaces; access to and within the site; and the scale, layout and detailed appearance of buildings and spaces.

Partnerships for Schools (PfS): PfS was set up in 2004 by the DCSF to manage and deliver the BSF programme. In March 2006 it also took on responsibility for delivering the Academies programme. Its key role is to ensure that investment in secondary schools is based on robust educational strategies and that BSF schools and Academies are: well designed; built on time at a reasonable cost; and properly maintained over their lifetime. It helps to build Public Private Partnerships, enabling the public sector to benefit from the skills and expertise available in the private

sector. PfS has developed guidance and standard documentation for BSF procurement and contract documents. These intend to reduce procurement time and ensure bidders respond in a structured and consistent way. It enables stakeholders to focus on the fundamentals of each scheme, knowing that underlying processes, terms and conditions are the same in each case. www.partnershipsforschools.org.uk

Planning Condition: Planning Conditions form part of a planning permission and limit and control the way in which a development is designed, constructed and used. Unlike Planning Obligations, they cannot be used to secure financial contributions.

Planning Obligation: Planning Obligations, agreed within either Section 106 agreements or Unilateral Undertakings, enable local authorities to secure financial and non-financial contributions to the infrastructure, amenity and services necessary to facilitate and/or mitigate any adverse effects of developments.

Post-Occupancy Evaluation: Once schools have been built and are in use, this is the process by which outcomes are assessed against the project's planned objectives.

Pre-Qualification Questionnaire (PQQ): Bidders expressing an interest in the BSF project advertised in the OJEU are issued with a PQQ to establish whether they have the technical capacity and ability, economic and financial standing to deliver the project.

Primary Capital Programme (PCP): PCP is the government programme to renew at least half of all primary school buildings by 2022-23. It is intended to encourage and support local authorities to take a long-term strategic approach to capital investment and to transform teaching and learning in primary schools, with The Children's Plan at its heart. From 2008-09, £150 million of capital investment will be spent on twenty-three pathfinder schools, increasing to £650 million for all local authorities in 2009-10 and £1.1 billion in 2010-11. To access funding, all local authorities were asked to prepare and submit a Primary Strategy for Change (PSfC) to the DCSF by June 2008.

Private Finance Initiative (PFI): A procurement route established in 1995, more widely adopted since 1997. PFI is one form of Public Private Partnership. A private consortia (funder, building contractor, architect and facilities management company) is awarded a contract to finance, design and build a school and then to operate and maintain it for a period of usually twenty five years. PFI is designed to transfer the risk involved in building and managing large-scale public sector projects to the private sector, with local authorities becoming the purchasers of services, rather than owning and operating buildings and other capital infrastructure. In a PFI contract, the scheme's overall objectives are laid out in the FSOS and contractors are invited to bid according to these requirements. PFI is the standard funding and delivery model for BSF schools that are being entirely or largely (more than 70%) rebuilt through the BSF programme and *'is expected to account for 41% of BSF by capital value up to 2011.'*¹⁶⁵ Central government support towards the cost of PFI projects is provided in the form of Private Finance Initiative Credits (PFI Credits).

Private Sector Partner (PSP): The private sector organisation with whom the local authority enters into a Public Private Partnership or a PFI contract. In BSF, the PSP has the majority stake within the LEP, and may also be in direct contract with the local authority through PFI contracts. The PSP is often a consortium made up of a range of private sector companies working collaboratively and can include construction companies, architects, technical specialists, landscape

¹⁶⁵ *The Building Schools for the Future Programme: Renewing the secondary school estate: Executive Summary*, Report by the Comptroller and Auditor General, The National Audit Office (NAO), HC 135 Session 2008-2009, 12 February 2009, p.6

designers, ICT providers, legal advisors and education consultants. The contractors negotiate with the local authority to provide services to construct and maintain infrastructure and ICT.

Project Board: A high-level Project Board is established by the local authority to provide strategic direction and leadership for its BSF proposals and to make sure that the schools' and other delivery partners' views are heard. The Board will usually meet monthly and be authorised to make selected decisions on behalf of the local authority.

Project Team: The BSF Project Team supports schools throughout the BSF programme, including the development of area and local visions; design considerations; the integration of ICT; curriculum remodelling; financial implications; and the identification of the preferred bidder and procurement.

Public Art: Art in the built environment, commonly known as public art, can take a number of forms: art in public places; art as public places; and socially-engaged practice. ixia defines public art as the process of artists engaging with the public realm.

Public Art Expertise: Includes artists, local authority public art officers, public art consultants and public art organisations.

Public Art Statement: A Public Art Statement should be written by a local authority to detail both the local authority's and the schools' requirements for public art. It should be included within, and inform the preparation of, key BSF documents.

Readiness to Deliver (RtD): The RtD summarises the education strategy, the procurement strategy and the project governance of a BSF programme. It is the document submitted by local authorities prior to entry into the BSF programme and is used by PfS and DCFS to assess which Wave local authorities should be allocated to and to give them a proposed date for their entry into the BSF programme.

Remit Meeting: The first formal meeting with a local authority as it begins a BSF project. It involves the key personnel from the local authority, PfS and DCFS, and formally sets out the objectives to be taken forward and delivered.

Royal Institute of British Architects (RIBA): The UK body for architecture and the architectural profession, providing support for members worldwide in the form of training, technical services, publications and events, and setting standards for the education of architects, both in the UK and overseas. RIBA promotes excellence in building design and works with the government to improve the quality of the built environment. In October 2005, RIBA launched a register of CDAs, architects and construction professionals accredited by RIBA who guide clients through the process of commissioning buildings. www.architecture.com and <http://members.riba.org/clientdesignadvisor/default.asp?cont>

Sample Schools: The first two schools to be developed by a LEP are known as sample schools. These are identified by the local authority as representing the design and costs of all the schools that the LEP will be required to deliver. The sample schools play a significant role in the process of evaluating the bids made by potential PSPs, providing them with the opportunity to competitively demonstrate that they possess the skills and resources necessary for delivering the BSF programme. The sample schools are normally a new school and the refurbishment of an existing school using PFI and D&B contracts. The remaining schools are known as non-sample schools. The sample schools, and subsequently the non-sample schools, are built by the LEP on behalf of a local authority in phases and within a ten-year period.

School Strategy for Change (School SfC): Whilst the local authority produces its SfC, each school within the BSF Wave is required to develop its individual School SfC, showing how it will support the delivery of the objectives and remit set out in the local authority's SfC, in light of its own needs and circumstances. The local authority is responsible for providing effective support to all schools in developing their School SfCs. School SfCs must be completed during the OBC stage and submitted with the OBC so PfS can review them as part of the OBC assessment process. School SfCs form part of the supporting documentation for the OJEU tender document.

Schools Design Panel: The Schools Design Panel was established by CABE in July 2008 and is a mandatory part of the BSF process. The Panel reviews bidders' proposals for local authorities' sample schools during the competitive stage of BSF to assess design quality and identify the strengths and weaknesses of each scheme. It is made up of a pool of forty professionals, including architects with school design skills and practitioners with more general experience. It assesses schemes against ten criteria: Identity and context; Site plan; School grounds; Organisation; Buildings; Interiors; Resources; Feeling safe; Long life, loose fit; and Successful whole. This is done using a four-point scale: 'very good'; 'pass'; 'unsatisfactory'; and 'poor'.
www.cabe.org.uk/design-review/schools

Sorrell Foundation, The: The Foundation's aim is to inspire creativity in young people and to improve quality of life through good design, providing innovative design concepts for schools and new life skills for pupils. Joinedupdesignforschools was launched in 2000 and was designed to be used for BSF. A client team of pupils follows a creative process of research, meetings and discussions.
www.thesorrellfoundation.com

Statement of Requirements (SOR): The document required to support the Supplier Selection and Award activities. The SOR defines the organisation's requirements against which the potential suppliers will respond via the Invitation to Tender process. The contents of the SOR will also define the criteria against which tender responses are evaluated.

Strategic and Facilities Audit: A Strategic and Facilities Audit is undertaken by the CSG as early as possible within the BSF process. It is used to assess and develop links with existing and emerging arts and cultural organisations and initiatives, including the provision of public art.

Strategic Partnering Agreement (SPA): The contractual agreement between the local authority and the LEP, setting out details of their partnership. It is a standard BSF document, produced by PfS.
www.partnershipsforschools.org.uk/library/bsf_standard_docs.jsp

Strategy for Change (SfC): The SfC is the first formal component of the BSF approvals process. It has to be produced at RtD stage, at the point of the local authority's entry into the BSF programme. The SfC ties together a local authority's education vision with the development of specific schools, setting out their plans for delivering greater diversity of provision, choice and access in accordance with the government's White Paper, *Higher Standards, Better Schools for All and the current Education and Inspections Bill*. It is designed to capture both the local authority's strategy for secondary education services and the requirements that this strategy places upon the physical school estate. Local authorities only submit their OBC for BSF investment once they have received formal approval of their SfC.

Wave: All local authorities are grouped in one of fifteen BSF 'Waves' – a group of BSF projects in a number of local authorities with funding starting in a particular financial year. The grouping was initially based on a deprivation score (GCSE attainment and free school meal uptake), with the local authorities and schools most

in need being prioritised for BSF funding. From Wave 4, local authorities also have to demonstrate their readiness to deliver BSF. A local authority may appear in several Waves, depending on the scale and condition of their schools estate. Information about which Wave a local authority belongs to can be found at: www.partnershipsforschools.org.uk/programme/progress.jsp. It has recently been announced that PfS is moving away from a Wave-based approach, and will instead be adopting a series of rolling starts.

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