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## Diocesan Support Scheme

### GUIDANCE NOTE 1

#### Capital Project Procurement Process – LCVAP supported schemes

**Note:** This guidance applies to all schools irrespective of whether or not they are in either the Joint School Building Fund or the DFC Support Scheme.

#### Capital Project Briefing

1. As early as possible in the calendar year briefing forms (Form E) will be issued to schools and consultants, identifying the anticipated project for the coming financial year, along with the anticipated cash profile.
2. Consultants should immediately enter into a professional agreement with the Governors, providing a schedule of services and a fee quote to both the Governors and the Diocese for agreement. (Use Form C when no other form of agreement is available)
3. At the time of briefing it should be noted that funding may not be confirmed with the relevant Local Authority, as such it is expected that the consultant will work up the project to RIBA work stage C and submit an estimate stage application to the Diocese on Form B. The work to this stage will be 'at risk' pending formal agreement from the LA to the funding for the project.
4. Please note Capital Allocations are based on fixed funding arrangements and consultants should at all times design **within** the allocation and should not expect that further funding will be forthcoming should project costs exceed the allocation – rather that allocations will be withdrawn and provided to other projects in the event of schemes being over-designed.

#### Estimate Approval

5. Estimate stage submissions (Form B) along with relevant drawings and compliant cost information must be received prior to the school summer holiday break – any scheme not complying with this requirement risks funding being withdrawn and re-allocated.
6. Subject to funds being available and the proposals being as briefed, approval to proceed to tender will be given.

### **Tender Approval**

7. Upon receipt of estimate stage approval consultants should work up the scheme to tender stage.
8. Tender stage submissions to the Diocese (Form L) and DCSF (VA Approval) should be completed prior to the October half term. Any project not submitted by this date risks funding being withdrawn or re-allocated.

### **Project Monitoring**

9. Should it become apparent that problems with project dates and claims are likely to occur, the Project Monitoring Form (Form F) should be completed and submitted to the department in order that appropriate action can be taken.

### **Additional Costs/Revised Allocation**

10. Should there be a requirement for additional costs or the need to revise the allocation on projects during the procurement or construction phase, it is essential that approval is received prior to any works being undertaken. Form K must be submitted as soon as it becomes apparent that revised allocations or additional costs are necessary, if works are carried out without approval it is not guaranteed that funds will be made available.

11. Blank

**Note: All Diocesan Forms require the signature of the Chair of Governors and the Head Teacher to ensure their agreement to the proposals and use of funding that they control. Any submissions inappropriately completed or incomplete will be returned to the consultant for rectification.**