

## **Schedule 4 (Tender)**



# ACCELERATING NET ZERO DELIVERY

**Net Zero Accelerator Community Energy Project  
(LocatED - NZA-CEP)**

**Lot 1 – West Midlands and East Midlands**

**Client:** LocatED on behalf of DfE

Submission Date: 18 March 2025

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## EXECUTIVE SUMMARY

Mace is excited by the opportunity to support you for the Net Zero Accelerator - Community Energy Project (NZA-CEP) in delivering decarbonisation interventions across 47 educational premises, assisting you in shaping the future delivery of decarbonisation across the existing education estate on behalf of the Department for Education. Our education system plays a pivotal role in society through delivering the education which enables young people to learn, to know, act, and to drive change. As climate change impacts become more and more evident, there is a global urgency to act. At Mace we believe that the Education Sector can act as a catalyst to enable the delivery of our climate commitments now, and for generations to come. Built assets which lead by example and provide the next generation of future leader's facilities which they can learn from, thrive in, and be inspired by is an important part of this transition.

### NZA-CEP Programme Director

XXXX

Associate Director, Mace  
Education Sector Lead, Sustainability  
[XXX@macegroup.com](mailto:XXX@macegroup.com)

**Regional Location:** MACE and Mott Macdonald, with extensive DfE experience, will lead and support the Net Zero Accelerator project. Our combined expertise in project management, logistics, research, innovation, and technical advisory services, along with national and local regional capabilities specific to each lot, positions us to effectively deliver and shape this initiative, supported by a carefully curated team of selected SMEs

Using this once in a generation opportunity to create good green jobs, develop a highly skilled workforce, create new markets, support competitive supply chains, tackle economic inequality, and build community led ambition we believe that education is the key to unlock some of country's existing barriers to climate success. We are therefore delighted to submit our response to the tender for this exciting opportunity and have carefully curated a team, tailored to your specific requirements, ensuring that every pound is well spent.

In summary, we will deliver this commission using:

- **An experienced and energetic team** – our carefully curated team offers a unique value proposition. Led by MACE supported by Mott Macdonald, RAFT (Retrofit Action for Tomorrow), Solar For Schools, SOS-UK, Inspired Efficiency, Laser, Nexus, Energy Sparks and Building Spatial Intelligence. Each member has been paired to specification outputs that play to their individual strengths to provide 'best in class' high quality delivery outputs.
- **A focus on creating legacy and impactful outcomes** – we aim to exemplify school decarbonisation funding by quickly recouping upfront consultancy costs through energy savings. Our team will focus on maximising savings at minimal cost whilst ensuring high quality outputs and hands on engagement to deliver a lasting impact, in line with specification requirements.
- **Deep-rooted and lasting behaviour change, with impacts monitored long term** – engagement will be integral to everything we do. At each step we will utilise our interactions across our stakeholders to assist in building capability, upskilling knowledge to build trust and understanding of their buildings, roles and responsibilities, building a momentum for them to act, and be part of the change.
- **Delivering Value to Society** - the link between education, the community and social value is crucial and often undervalued. Our team will measure monitor and report our impact to support tackling economic inequality, improving educational attainment, providing access to green skills development, and support training requirements.

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# 1

## DELIVERY METHODOLOGY

**Criterion: A high-quality delivery methodology which will meet the Authority's requirements.**

**Question:** Please provide your delivery methodology explaining how you will meet the Authority's requirements set out in the Specification. Tenderers must provide a delivery methodology for each element of the Specification.

- Selection Stage
- Regional Alliance Feasibility Stage
- Basket 1 Stage
- Baskets 2 and 3 Stage

The delivery methodology should include the following elements:

- a) An outline of the resources (including the skills of relevant personnel) that you will use to deliver the project
- b) An organogram, which should include all key team members working on the project and
- c) A schedule of each workstream and associated activities including process maps e.g. mobilisation, data capture, procurement behavioural change, monitoring etc.

Word Count: 5,000 words max (organograms excluded)

# 1. DELIVERY METHODOLOGY

Mace is excited to support the Net Zero Accelerator - Community Energy Project (NZA-CEP) in delivering decarbonisation interventions across 47 educational premises, shaping the future delivery of decarbonisation for the Department for Education. Our education system plays a pivotal role in society by enabling young people to learn, act, and drive change. This opportunity aims to create green jobs, develop a skilled workforce, support competitive supply chains, tackle economic inequality, and build community-led ambition.

Our Vision is to work in collaboration to provide a high-quality service which exemplifies and creates a legacy for the retrofit of the education estate

## We will achieve this vision through:

1. **An experienced and energetic team:** Led by MACE, our team includes Mott Macdonald, RAFT (Retrofit Action for Tomorrow), Solar for Schools, SOS-UK, Inspired Efficiency, Laser, Nexus, Energy Sparks, and Building Spatial Intelligence (formerly School Property Matters). Each member is paired to specification outputs that play to their strengths.
2. **Creating legacy and impactful outcomes:** We aim to exemplify school decarbonisation funding by quickly recouping upfront consultancy costs through energy savings. Our focus is on maximising savings at minimal cost while ensuring high-quality outputs and hands-on engagement for lasting impact.
3. **Deep-rooted and lasting behaviour change:** Engagement is integral to our approach. We will build capability, upskill knowledge, and foster understanding of buildings, roles, and responsibilities. This will create momentum for stakeholders to act and be part of the change.
4. **Delivering value to society:** The link between education, community, and social value is crucial. Our dedicated social value manager will measure, monitor, and report our impact, supporting economic equality, improving educational attainment, support training requirements and provide access to green skills. This will deliver tangible outcomes benefiting this programme and future works.

## Our Value Proposition

- **Site Selection Stage:** Led by RAFT with input from Solar for Schools, Mace, and Mott Macdonald. Within 44 days of contract award, we will reduce the long list of 100 premises to 47, including one college, targeting those with the most potential benefit, value for money and deliverability.
- **Regional Alliance Feasibility:** Led by Mott Macdonald with input from the full supply chain. Delivered 6 weeks post contract award, it will provide a full economic business case for how a regional condition, decarbonisation, and resilience service could operate, be funded, and add value to existing processes and support services for estate management.
- **Basket 1:** Mace and Mott MacDonald will assure, and oversee SMEs led by RAFT focusing on decarbonisation plans, engagement programmes, and energy monitoring. We will integrate behaviour change with consultancy work and provide the Energy Sparks and RAFT Action Builder platforms.
- **Basket 2 & 3:** Mace will maintain overall responsibility for programme delivery, with projects split between Mace and Mott MacDonald as Technical Advisors in consultation with RAFT. Laser, Solar for Schools, and Inspired Efficiency will remain part of the delivery team, supporting technical guidance, procurement, grant funding applications and ensuring long-term data monitoring and support.

### Our People - Delivering Exceptional Quality through Expert Partnerships

MACE and Mott Macdonald, with extensive DfE experience, will lead and support the Net Zero Accelerator project. Our combined expertise in project management, logistics, research, innovation, and technical advisory services, along with national and local regional capabilities specific to each lot, positions us to effectively deliver and shape this initiative, supported by a carefully rated team of selected SMEs.



### *Team Organogram*

#### Team Profiles, Key Resources & Skills

- **Mace** is ranked No.1 TA delivery partner and has worked with DfE for 12 years delivering national programmes, known for their expertise, professionalism, attention to detail, pragmatism, high-quality outputs, and national reach. Key team members from Mace include;
  - **XXX (MCIBSE, IEng)**: lead point of contact for the contracting authority. With experience in developing retrofit treasury bids, authoring DfE Net Zero technical standards, and leading Mace's education sector sustainability services, Gemma brings a 'big picture' view to drive the team's collective vision.



- **XXX MRICS, MEng**: based in Manchester, acting as the building surveying lead. XXX leads Mace DfE PFI surveys and brings knowledge of the existing estate and key challenges schools face.
    - **XXX (MRICS, MEng)**: Project management lead and integral to the Northern DfE Education team, XXX acts as Lead TA and maintains high KPIs in quarterly DfE client reporting. XXX focuses on stakeholder engagement and managing projects from inception to completion.
  - **XXX (BA Hons, MSc)**: responsible for management and reporting of social value outcomes. Based in Manchester, XXX will use her experience with public sector clients, such as MOJ, to add value to this commission.
- **Mott Macdonald** is a longstanding partner for the DfE, supporting research streams like GenZero, Energy Pods, alliance framework, and S21. They recently delivered a fabric intervention research project with UCL, assessing energy, carbon, and cost of energy efficiency and heat decarbonisation interventions. Key team members include:
    - **XXX CEng**: will input into project strategy and oversee delivery. As DfE Framework Director, XXX has grounded experience in project management and procurement advisory services, including developing the DfE Alliance for Learning strategy and DfE MMC1 framework.
    - **XXX (MAPM, MEng)**: will lead project management, overseeing and coordinating the team to deliver the project collaboratively. XXX managed the DfE Energy Pods project and is a Lead Technical Advisor for DfE projects
    - **XXX (MCIBSE, CEng)**: will provide sustainability technical advisory for basket one deliverables. As a leading Net Zero Advisor, XXX offers insights from his work on decarbonisation plans for public sector buildings and the GLA Net Zero Accelerator Programme.
    - **XXX (MRICS)** will lead QS, overseeing cost plan development. XXX manages Mott's QS delivery for DfE schools work, including retrofit schemes and Energy Pods and GenZero pilots.
  - **RAFT (Retrofit Action for Tomorrow CIC)** is a mission-led practice known for delivering evidence-based, actionable plans, highlighted as exemplary by Salix Finance. RAFT focuses on building retrofit, zero carbon planning, and behaviour change-focused community engagement in the education sector. Supported by Ashden LetsGoZero, they developed a Zero Carbon Action Builder platform for all UK schools, which will be adopted for this commission. Key team members include;
    - **XXX (AA dipI CEPH RIBA ARB MBE)** is an architect and Founder/Managing Director of RAFT. XXX is involved in all areas from estate-wide and school-site decarbonisation planning to on-site delivery, committed to closing the performance gap. He will act as the technical director for Basket 1, overseeing and managing the quality of technical delivery across the 47 premises.
    - **XXX MA March MSc RIBA ARB** is an Architect, Passivhaus Designer, and Retrofit Coordinator specializing in retrofitting existing buildings. XXX has led several estate-wide decarbonisation plans and site selection studies for councils, Dioceses, and Multi Academy Trusts. She will lead the Selection Stage for this commission and maintain involvement throughout the technical HDP development.
    - **XXX (MEng, MArch RIBA ARB)** is an Architect and certified Passivhaus Designer. XXX has delivered numerous heat decarbonisation plans and early-stage pre-feasibility plans, supporting schools in driving fabric measures within school premises. She will be the heat decarbonisation plan lead for this commission
    - **XXX (BA (Hons) PGCE)** will be the engagement lead with extensive experience in outreach and engagement activities with school communities. A former teacher, XXX has developed and delivered activities ranging from workshops with students to training sessions with senior leaders and premises managers to deliver best-practice outcomes.
  - **Inspired Efficiency**, founded by **XXX BSc, MRCIS, CMVP**, is dedicated to reducing energy use and carbon. XXX will be our building services and controls optimisation lead. He is an experienced advisor on energy, carbon, and sustainability, having held positions such as Head of Sustainability at EC Harris and Sustain. He advises industry bodies like RICS and serves as the technical sustainability advisor for the Diocese of Gloucester on nearly 400 listed buildings. XXX excels in both boiler rooms and boardrooms, delivering positive results.
  - **Solar for Schools** (Solar Options for Schools Ltd) is a social impact company which helps schools access solar electricity. In the UK, it has installed solar at over 200 schools and manages over 25 MW of solar power nationally delivering on-going annual sustainability education as part of its legacy asset management



programme. Their core team will be supported by the in-house technical and multi-disciplinary project management design and education teams and include:

- **XXX (MBA)** drawing on his experience in the Solar PV sector will be 'Solar Delivery Lead' leading on feasibility and project development for this commission. From 2010 to 2014 XXX was the U.K. Managing Director of Conergy a leading German contractor and developer. In that time, the company delivered more than 200 MW on sites across England and Wales. He has also managed the roll-out programme for more than 40 supermarkets to meet a tight programme and multiple public sector buildings.
  - **XXX (MA Education, BSc, NPQSL)** is an award-winning science and technology teacher. She specialises in science and sustainability with over 25 years' experience in environmental education and will head up our engaging education package, linking the panels on the roof to the curriculum in the classroom. They are supported by the in-house technical and multi-disciplinary project management design and education teams.
- **SOS-UK**, an education charity focused on sustainability, was established in 2019 by the National Union of Students. With nearly 50 professional staff and 25 student staff, they work across the UK to transform education for climate and nature protection. **Jamie Agombar (Bsc Ecology, MRes Science of the Environment) and Quinn Runkle (BA Geography and Politics, MEd Sustainability Education)** will lead the curriculum integration, communications plan, and wider community and stakeholder engagement strands of this project, ensuring learning legacy is locked-in long term.
  - **Nexus Associates**: Specialists in ICT design and implementation for 20 years, focusing on sustainable integration within education projects. Nexus will lead ICT 'quick wins' and audits within Basket 1 services, supporting behavioural change and optimising existing ICT equipment for energy savings.
  - **LASER**: Delivering Energy Procurement, Contract Management, and Energy Management to the public sector since 1989. LASER ensures clear, transparent, and actionable information, validating around 300,000 energy invoices annually. They will lead Energy Procurement basket 1 services and support the rollout of LED interventions during Basket 2 services.
  - **Building Spatial Intelligence (BSI)**: Provides space-usage assessments as part of net capacity assessments and determines potential surplus under DfE playing field guidance. BSI will also lead the development of the BIM Models.
  - **Energy Sparks**: Offers energy and carbon analysis, advice, and education to UK schools to help reduce their carbon footprint. Their tailored dashboards, analysis, and action-prompts support all stakeholders, from pupils to estate teams. The Energy Sparks platform subscription will be provided to all 47 premises and used with other platforms for long-term monitoring.



Figure 1 Our Combined Expertise

## Our Approach to meeting the Authorities Requirements to the highest quality standards

### Site Selection Stage

The Selection Stage will be led by **RAFT's XXX**, with input from Solar for Schools, MACE, and Mott Macdonald. RAFT have substantial experience in 'selection stage' work, producing rapid desktop studies for councils/ estates across the UK. They gather and present information such as school area, energy use, carbon emissions, and boiler ages in user-friendly schedules, helping clients prioritise schools for decarbonisation. RAFT has also conducted detailed strategic decarbonisation studies for 7 Local Authorities, Dioceses, and Academy Trusts, using desktop data collection, site surveys, energy, and cost modelling to prioritise measures and schools for action. They have successfully helped clients apply for government funding schemes and supported schools in obtaining PSDS funding and completing works on site. RAFT will draw on data from almost 500 schools to inform decision-making on this programme. Supporting them, **Solar for Schools** has conducted desktop PV assessments of around 3,000 schools, estimating maximum PV generation and advising on optimal PV generation based on energy use and self-consumption. This ensures selected sites focus on delivering real outcomes. **MACE** and **Mott Macdonald**, with considerable experience in school decarbonisation, will lead the Regional Alliance Feasibility Stage, feeding into the deliverability aspects of the Selection Stage.

### Our Methodology

The aim of the Selection Stage is to find schools offering the most potential benefit, value for money and deliverability. It's also important that a representative mix of schools is chosen. The diagram below (Figure 2) summarises our approach and provides examples of factors we would consider in selecting suitable schools. To meet the 44-day deadline, we will mainly use data from public sources. However, we also recognise that the key to successful decarbonisation is the occupant's capacity and willingness to undertake works and change energy habits. Consequently, we will also send out carefully curated questionnaires to schools and estates to help inform the selection process. This programme is about delivery and action so, if possible, we will also try to most suitable schools/colleges that could be *fast-tracked* through the Selection Stage.

### Aims



### Approach

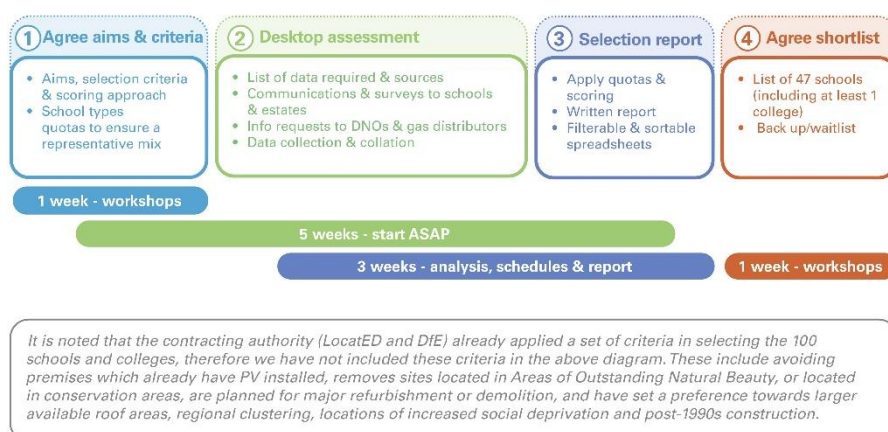


Figure 2 Aims and Approach



## Regional Alliance Feasibility Stage

The Regional Alliance will be led by Mott Macdonald with input from the supply chain, namely Mace, RAFT, Solar for Schools and Laser Energy. The resources combine specialist Procurement Advisers, Business Case drafter and Financial Modeller. The team will develop a portfolio of Regional Alliances to deliver decarbonisation interventions by;

- Optimising Regional Alliance models
- Defining the services portfolio for these alliances
- Establishing a robust business case for the recommended model

This initiative will leverage existing decarbonisation funding and explore private sector options. It will define the necessary organisation, processes, and systems for effective interventions. Using RICS Project 13 alliance experience, we will collaboratively build alliance options and use a decision support tool to identify the best model. Partnering with the Authority, we will explore core functions for a Regional Alliance Model to optimise value for money and decarbonise schools.

## Methodology and programme

The methodology shown in Figure 3 is proposed to support development of this study, and shows high level input requirements, activities, supporting deliverables and programme. This starts with an initial workshop with the Authority to align objectives and agree assumptions and follows the 4-stages shown.

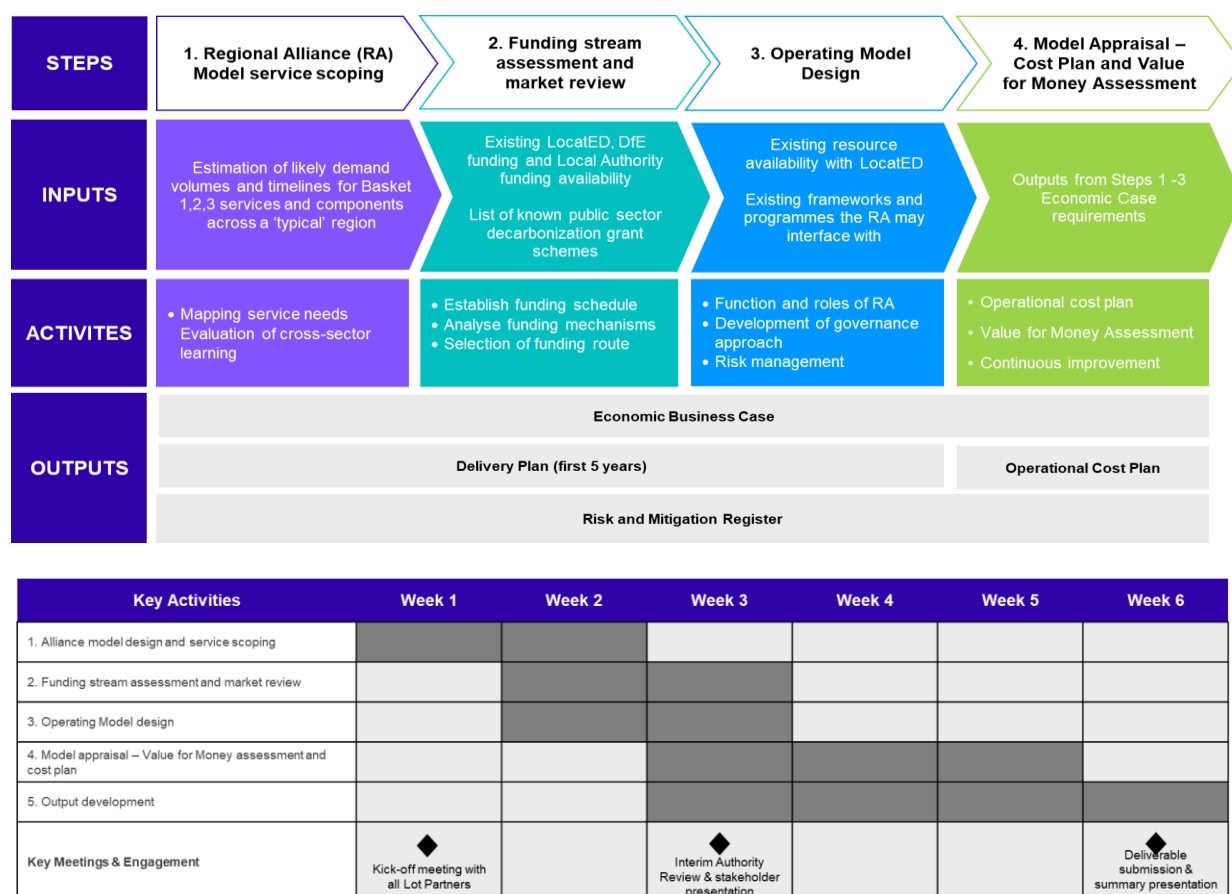


Figure 3 Methodology & Programme

### Assumptions

- 6x weekly meetings
- 2x focused workshops
- Provision of economic case shall be high level
- A single review and feedback loop for all documents provided, including financial model
- Required information is readily available

## Basket 1 Services

Engagement will be integral to everything we do. At each step, we will utilise our interactions with the schools and colleges to build their understanding about their own buildings and energy use as well as build momentum for acting.

### Combined Expertise & Resourcing

Our team will deliver the Basket 1 requirements by interweaving consultancy with engagement work, underpinned by wide-ranging technical expertise, practical onsite assistance, and up-to-date energy monitoring. RAFT will act as the overall lead for Basket 1 services, utilising their broad expertise to offer high-quality standards.

#### Key Team Members:

- **XXX and Inspired Efficiency (IE):** XXX will optimise systems, conduct energy audits, and deliver control training during site visits. Light maintenance and minor repairs will be carried out.
- **Solar Options for Schools (SOFS):** SOFS will provide solar irradiance analysis, install energy monitoring equipment, and offer an online platform for schools to track energy use, linking solar panels to the curriculum.
- **SOS-UK:** SOS-UK will design a school-focused and community communications plan, develop a pupil-centred engagement strategy, and co-create climate action plans (CAP) with schools.
- **Nexus:** Nexus will audit ICT strategies, identify energy efficiency opportunities, and develop energy-efficient ICT strategies in collaboration with the DfE ICT team.
- **LASER Energy:** LASER will review energy contracts, analyse billing data, and recommend supplier efficiencies. They will provide a report and deliver a Webinar Workshop to support procurement planning.
- **Building Spatial Intelligence (BSI):** BSI will assess space usage, determine potential surplus, and lead the development of the BIM Models.

### Our Approach

First, we will **gather information through site surveys**, workshops, visits, follow-up contact, and energy monitoring. We will then provide feedback via newsletters, training sessions, visits, support, and heat decarbonisation plans.

To manage the project efficiently, we will **divide the 47 schools into 5 clusters of ~10 schools each**, grouped by proximity. **Dedicated coordinators will act as single points of contact**, build relationships, appoint sustainability champions, reduce the burden on premises, and communicate with schools through meetings, visits, and surveys.

We will hold introductory workshops to set project aims, share success stories, and build trust. Each school will have 2 engagement days: the first for surveys, audits, and control optimisation, and the second for presenting findings through assemblies, workshops, and collaboration with premises managers.

Our **adaptable engagement program will offer a ‘menu of activities’** tailored to each school's needs. The second day will be a “hive of activity,” including a pop-up office for live co-creation and problem-solving.

Table 1. Proposed methodology and resources to deliver.

When will we do it?	What will we do?	Who will lead?
June 2025 – May 2026	Ongoing coordination & collaboration	
	Collaboration with DfE commercial and ICT teams and other partners	MACE/MOTTS/RAFT/LASER

	Fortnightly meetings with all key project stakeholders	
	Fortnightly reporting with progress/impact tracking & verification	
	Collaboration with schools & colleges to obtain and feedback information, and to set up site visits & online events	RAFT/SOFS/SOS-UK
	Provide content for school newsletters throughout programme	
	Email/phone/make contact with district network operators and utility providers	SOFS/RAFT
	Design and deliver school focused communications plan	
	Wider community communication plan, including political communications plan	SOS-UK/RAFT
June 2025	<b>Introductory workshops (online workshop for school clusters)</b>	
	<i>Attendees: Trustees, Directors &amp; Estates team; School leadership teams &amp; premises managers</i>	
	Introductions, project overview, vision, and ambitions	RAFT/SOS-UK/SOFS
	Project programme & Next Steps	
June 2025 – July 2025	<b>Engagement pre site visit</b>	
	<i>Emails, phone calls, online surveys</i>	
	Organise first site visits, obtain missing information (asbestos, RAAC, plans etc.)	RAFT/SOS-UK/SOFS
	Obtain letters of authority for energy data access	
	Surveys to schools about building comfort & Scope 3 emissions	
	Letters of consent sent out to schools for participation in photos/social media	
	Ensure sustainability champion appointed at each school	
June 2025 – July 2025	<b>Data collection pre site visit</b>	
	Obtain energy contract information, consumption and meter data, relevant financial information, latest CDC survey data, details of site freehold/ leasehold ownership, including title plans	RAFT/SOS-UK/SOFS/LASER/BSI
June 2025 - October 2025	<b>Engagement Day 1 - surveys, audits &amp; optimise controls</b>	
	<i>Full day in-person, 1 per school</i>	
	Gather fabric & services information in collaboration with premises manager and support schools to add their information to the RAFT Action Builder platform	RAFT/IE
	Shadowing opportunity for school heads / premises manager to learn more about their buildings and how to decarbonise	
	Work with premises managers on systems (optimise controls/ BMS training)	
	Site surveys including photogrammetry, thermal imaging (during heating season), air tightness testing	
	Pupil-centred engagement in parallel with surveys	SOS-UK



	Assess community use/ community energy opportunities	RAFT/MACE/MOTTS
	Undertake condition survey & Identification of quick-win opportunities	RAFT/IE/SOFS
	Half-hourly readings through additional addressable sensors or switching to smart meters	SOFS/ES
	Energy audit, supply systems audit, obtain data relating to any existing on-site renewables	IE/SOFS
	Identification of project-based learning opportunities	RAFT/SOS-UK/SOFS
	Solar irradiance survey	SOFS
	ICT audit	NEXUS
	Mobile LiDAR surveys to create a 3D digital twin	BSI
<b>June 2025 - November 2025</b>	<b>Decarbonisation planning</b>	
	Thermal modelling, Digital plans & BIM model	RAFT/BSI
	Cost modelling	RAFT/MOTTS
	Opportunities/ constraints plan (listed buildings, flood zones, etc.)	RAFT
	Basket 2 & 3 feasibility assessments including solar PV, EV chargers and battery storage, inc planning & DNO	SOFS/RAFT
	Develop concept design for each of the proposed interventions	RAFT/SOFS/IE
<b>June 2025 - May 2026</b>	<b>Engagement with Energy monitoring platforms</b>	
	<i>Role-specific online webinars for all schools/colleges Attendees: Estates team; School leadership team &amp; premises managers</i>	
	Introduce the online energy management and education portal including dashboards and pupil education resources	SOFS/RAFT/ES
	Get school staff making the most of the insight from the energy data and action prompts	
	Analyse energy data on the platform to inform the decarbonisation plans	
<b>November 2025</b>	<b>Issue Decarbonisation Plans to each school &amp; Batch Decarbonisation Plan</b>	
	Pdf report for each school	RAFT
	Excel spreadsheet for schools & estates teams	
<b>November 2025</b>	<b>Issue final reports &amp; accompanying information</b>	
	Services & BMS user guide	IE
	BIM model and associated information; Site plans in digital format and redline plans; Net capacity assessment & potential surplus	BSI
	Collated school information (CDC, condition surveys, structural surveys, etc.)	RAFT
	Energy procurement report	LASER
	Energy efficient ICT strategy (produced with DfE ICT team)	NEXUS
	<b>Engagement Day 2 - “a hive of activity” &amp; pop-up office</b>	

November 2025 – May 2026	<i>Full day in-person visit, one per school. Attendees: MAT Trustees, directors &amp; estates team; School leadership team, premises managers, teachers &amp; pupils; (DfE Climate Ambassadors and Ashden Climate Advisors invited)</i>	
	Whole school assembly; Pupil and staff workshops; collaboration with premises manager; lunch with governors/school leaders/PTA	RAFT/SOS-UK/SOFS
	Present the HDP to the school + findings from energy monitoring to date	
	Installation of school energy display panels (making use of screens in reception and interactive screens in classrooms)	SOFS
	Support schools to engage with DfE Climate Ambassadors, Ashden Climate Action Advisors, DfE nature park programme & Count Your Carbon	RAFT/SOS-UK/SOFS
	Pupil workshops & project-based learning; collaboration with DfE initiatives	
	Co-creation of climate action plans with teachers and pupils with further support from DfE Climate Ambassadors	SOS-UK
November 2025 – May 2026	<b>Ongoing engagement &amp; feedback</b>	
	Green skills careers fair	RAFT/SOS-UK/SOFS/IE
	Post second site visit summary (PDF 1-pager)	
	Webinar & drop-in clinic for premises managers (Online)	
	Wider community presentations, including local politicians	
	Inter-school peer to peer sharing	
September 2025 – May 2026	<b>Engagement with RAFT Action Builder platform</b>	
	<i>One webinar per school cluster</i>	
	Schools/colleges set up on the platform with information gathered	RAFT
	Webinar to introduce and train school/estate staff to use the platform	

### Assumptions

- We have a made allowance per school to deal with ad-hoc surveys where updates may be required.
- As CDC is a full estate programme, we have not included for any additional CDC reports.
- A general condition will be provided at a full asset level, but full condition assessment will only be undertaken where relevant to the proposed works in basket 2 & 3.
- We assume all asbestos sites have an up-to-date asbestos register and that if a survey is required, we can procure a quotation for instruction by DfE Secretary of State.

## Inspiring Schools to Act

We will encourage and enable the schools to continue to act and achieve savings through identifying target savings for each school at the outset of the project, with ongoing monitoring and access to three online platforms.

We will **inspire** schools to act, through our engagement and behaviour change programme. We will encourage action through friendly competition and a sense of achievement and provide regular evidence of actions taken and energy savings made, through newsletters, monthly reports, and via access to three online platforms (please see details below in Figure 5).

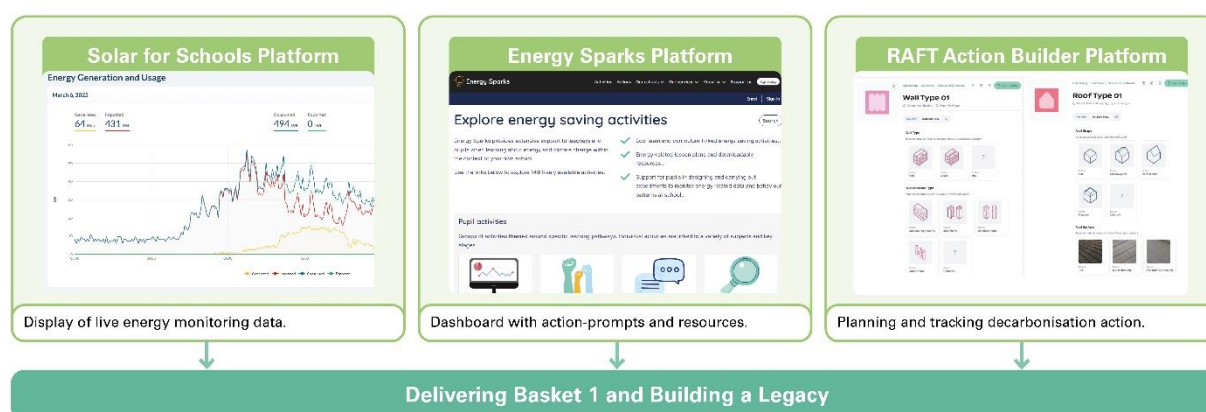


Figure 4 Proposed Dashboarding Platforms

## Not just a Decarbonisation Plan

In addition to providing a decarbonisation plan for each school, we will equip schools and estate teams with the tools and knowledge to maintain that plan.

Firstly, we will help schools build a deeper understanding of their buildings and services through collaborative site visits, workshops, and follow-on support.

Secondly, schools will learn about their energy use and savings by displaying up-to-date energy data via the SOFS online platform, with further analysis and action prompts available through Energy Spark's user-friendly platform. We have not allowed for the installation of sub-meters, but we will use appliance monitors where appropriate. Where required we will install data loggers, but elsewhere we will model the split on renewables technologies to inform DPs. We assume all Renewable energy generation will already have data logging.

We will use existing monitors for displaying energy data, such as screens in reception and classrooms.

We will pay the charges relating to obtaining access for half hourly meter upgrades, as we recognise that having to pay this charge can be a blocker to some schools upgrading to smart meters.

Thirdly, we will support the onboarding of schools to the RAFT Action Builder platform which will provide guidance and planning of proposed decarbonisation measures. In addition, estate access for Action Builder (due to be launched in Sep 2025) will further support decarbonisation and maintenance planning, including understanding energy and carbon, relevant measures, and maintenance needs (e.g. boiler ages), facilitating evidence-based decision-making.

Finally, a Batch Decarbonisation Plan will summarise the proposed measures and associated energy and carbon savings for all schools and be presented in spreadsheet format.

## Collaboration with Premises Managers

We will ensure schools can act quickly by collaborating onsite with premises managers to improve building services and fabric, such as adjusting system settings and addressing insulation or air leakage. Inspired Efficiency will optimise BMS systems, allowing one day per site for light maintenance and minor repairs. Additional repairs beyond this will take place in Basket 2 services. We will track progress in energy, carbon, costs, and actions through SOFS, Energy Sparks, and RAFT platforms, providing a feedback loop to inspire schools and build a legacy of action.

## Delivering year 1 financial, energy and carbon savings

In the first year, we will achieve financial, energy, and carbon savings through behavioural change, system optimisation, and strategic improvements. Engaging pupils and staff in simple actions like switching off unused lights will generate immediate savings. Collaborating with premises managers, we will fine-tune building services and identify quick-win improvements. Inspired Efficiency will optimise BMS controls, Nexus will suggest ICT efficiencies, and SOFS will assess on-site renewables. RAFT will maintain an action log to track short-term energy-saving measures, ensuring continuous progress and measurable impact.

## Policies and Standards

All our supply chain partners are familiar with and can meet and deliver to DfE technical standards including RICS WLCA and UK Net Zero Carbon Building Standard.

## Building Information Management

BSI will obtain existing structural surveys, site plans, redline plans, and details of site ownership, including title plans and CDC survey data. They will complete mobile LiDAR surveys with OS Data, covering all physical structures and defining areas over the ordnance survey map base. Building sections and elevations will be derived from the 3D BIM, with the external site area bounded by the redline plan and car park provision defined for future EV charging.

High-resolution information will be collected in plant and server rooms. 3D objects for plant items and assets will be created and mapped to source locations in CAFM, including all assets subject to 'basket two' interventions. All data will be consolidated into a comprehensive 3D BIM, including 2D Floor Plans, LiDAR surveys, categorized space usage, and utility positions, aligned to ISO 19650, and provided in specified formats (DWG, PDF, IFC) royalty-free.

Data and graphic objects will be presented within Microsoft PowerBI for visual representation, including Net Capacity and DfE classifications. PowerBI Dashboards will be supplied in usable format within AutoDesk Construction Cloud (ACC) and as templates for modification. The dashboards will read data directly from the BIM within ACC, preventing data silos and enabling further enrichment of spatial data.

## Delivering value in Basket 2 and 3 Services

Led by Mace and Mott MacDonald, we have the skills and experience to manage a programme-based approach to the development and procurement of projects across school sites. Our SMEs have the skills, resources, and track record to develop design requirements and complete successful PSDS applications to secure funding.

For Baskets 2 & 3, our experienced TAs will plan and manage the procurement of decarbonisation works, supported by procurement advisors who will help develop a programme-specific route to market informed by the Regional Alliance study, leveraging scale and volume to get best value and increase efficiency.

Where schools are identified as a priority for capital funding (e.g. end-of-life gas boiler), their HDP would be prioritised in Basket 1 to be ready for an application in October/November 2025 for PSDS5.

We propose to batch each intervention to maximise value in procurement, e.g., solar installations batched as 5 tranches of 9/10 schools, with individual contracts placed for each premise, at the prescribed project value. By procuring this way and advertising locally, we will encourage qualified SMEs to participate and grow skills and capacity locally.

We will consider separate supply agreements for key components such as PV modules and LED lights, where demand can be aggregated across the batch to secure quality equipment at best value.

Our approach provides added opportunity for Solar PV schemes to be prioritised, allowing our expert partner Solar for Schools (SfS) to progress procurement of solar installations at pace and scale directly after Basket 1 approval.

If the selection process identifies ideal sites for solar PV, we could bring forward procurement of solar PV installations for these schemes during Basket 1, further prioritising PV and bringing forward energy savings.

Our programme management team will collate data from projects and maintain a master tracker with up-to-date programme details, and our project dashboard will show the status of each scheme. Energy performance data will be integrated into the dashboard to highlight progress with energy savings.

Enrichment activities will continue through this phase, and students will learn from their buildings with engaging workshops and celebration events for the community. CPD sessions will support teachers to deliver education for sustainable development, senior leadership teams to develop climate action plans, and site teams to manage electricity and gas use across their school estates.

School engagement will be led by a dedicated TA coordinator for each school who will manage and oversee all works and provide an interface between the school and the installers/contractors. The TA will ensure well-planned delivery that takes account of each school's specific needs and minimises disruption.

Our technical teams will assure and oversee the works being developed, and our QS teams will report on cost, prepare pretender estimates, evaluate tenders, and manage change control.

We will act as contract administrator during the works, carry out regular site visits, validate commissioning, certify completion, and deliver guarantees and warranties.

During defects, we will undertake a post-completion review and monitor performance, reporting back to the authority and schools.

**Word Count: 4972 words**

# 2



## STAKEHOLDER ENGAGEMENT

**Criterion: Detailed Stakeholder Engagement Strategy relevant to the specific Lot.**

**Question** Please provide a detailed stakeholder engagement strategy to facilitate successful completion of the Basket 1 deliverables within the required timescales set out in the Specification, and the Basket 2 and Basket 3 services.

Please explain how you will engage with the following stakeholders: different types of schools and colleges, different responsible bodies including (trusts, local authorities and diocesan authorities), teaching staff, site staff, pupils, school governing bodies, and statutory authorities (including utilities and planning authorities).

The stakeholder engagement strategy should include the following elements;

- a) Stakeholder engagement approach/method
- b) Indicative programme and engagement plan; and
- c) Management and report structure

Word Count: 2,000 words max.



## 2. STAKEHOLDER ENGAGEMENT

By working in collaboration, RAFT, SOFS and SOS-UK will create an exemplary, innovative and pupil-centred programme of engagement, with the aim of setting a national standard of excellence for stakeholder engagement. The adaptable model is designed to inspire and build a lasting legacy for multiple stakeholders, using an evidence-led, accessible and actionable approach to engage with the delivery of decarbonisation initiatives.

The team have agreed on the following **core principles** to guide the engagement strategy:

1. Follow a flexible model of engagement which adapts to the specific needs of each school.
2. Win hearts and minds across the school community through solution centred, face-to-face pupil learning and consistent collaboration with stakeholders.
3. Operate in a partnership manner by building on the strengths and expertise of the team.
4. Create a positive legacy by promoting lasting behavioural changes, integrating engagement activities into the curriculum and social value creation.

### A. Stakeholder engagement approach/method

The engagement strategy will adopt an efficient, meaningful and pupil-centred approach to ensure that schools and colleges develop an understanding of energy use, carbon emissions, building fabric and building systems, simultaneously embedded into the curriculum. This is summarised in the following 3 strands:

1. **Seek immediate reductions in energy usage & carbon emissions through behaviour change and energy management.** In order to monitor energy use in all schools from the outset, independent gas and electricity monitoring will be installed to all meters to provide baseline data with a dashboard visible on the Solar for Schools website – this will enable the live tracking of changes following engagement activity. In addition, schools will be onboarded for one year to Energy Sparks and we will pay for half hourly meter data as that can be a barrier for schools.
2. **Decarbonisation planning for Basket 2 & 3 services and fabric measures.** To achieve a comprehensive and robust plan, statutory providers and schools will need to engage with and provide information to the team. Crucially, they need to progress their decarbonisation plans after the end of this programme, and to achieve this, pupils, staff and the wider community must obtain a good knowledge and understanding of the schools' existing building fabric and systems.
3. **Deep-rooted and lasting behaviour change that is integrated within the curriculum, with impacts monitored long term.** To this end, the schools need access to continuing education through curriculum integration and guidance support from the Department for Education (DfE) Climate Ambassadors and Ashden Climate Advisors.

Regular, straightforward communications and an open approach to 'what's going on' during our visits will underpin the approach. Courteous, fun and well-informed communications, tailored to stakeholder groups will be provided, ensuring good relationships are established and maintained throughout Baskets 1-3. A whole school approach will be adopted, engaging with staff, teachers, premises teams, pupils, parents and governors. The team are mindful to not over-burden schools, curating a programme tailored to ensure efficient knowledge-sharing, aligning with schools'/colleges' primary focus: educating children. The core team and stakeholders are identified below.

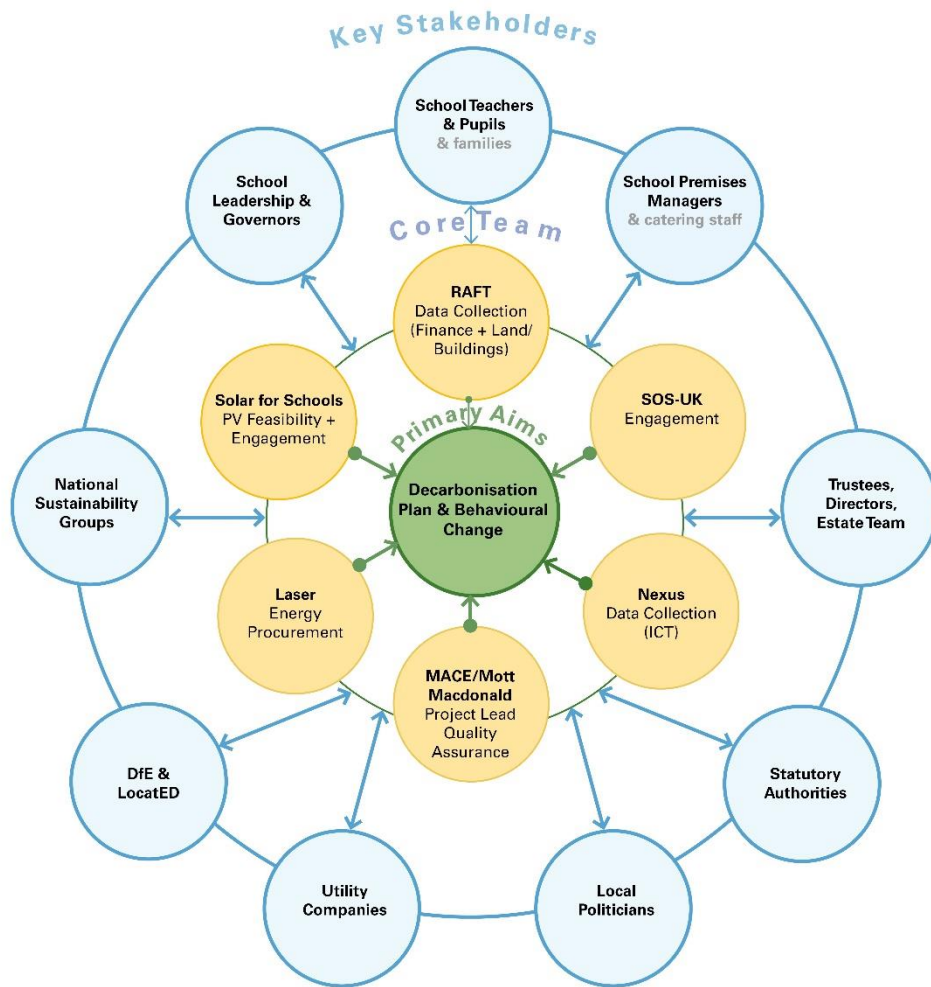


Figure 1 - Core Team and Key Stakeholders

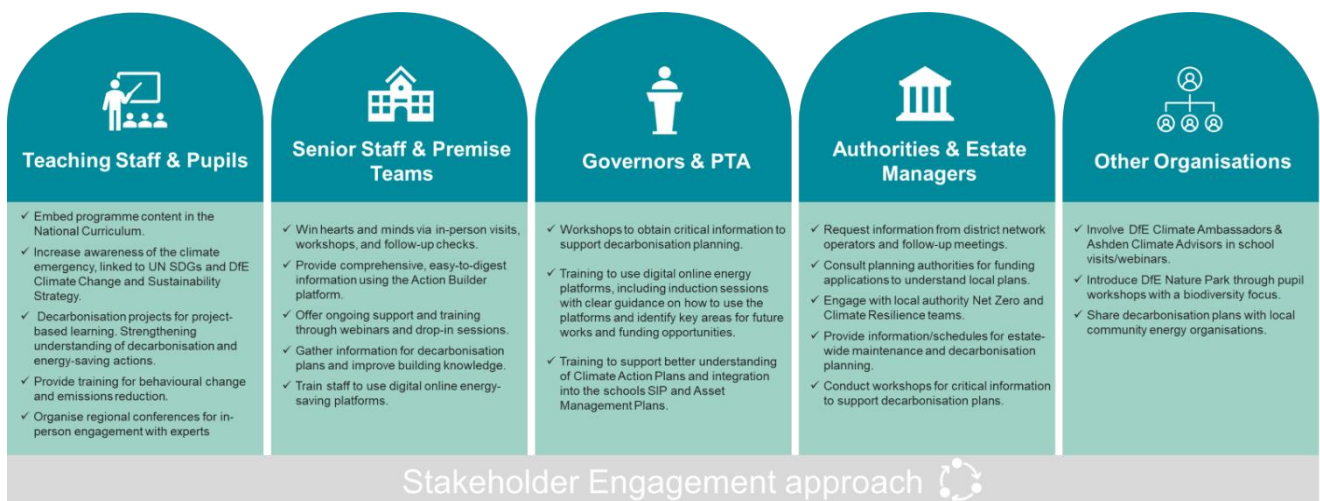


Figure 2 - Key Stakeholders &amp; Engagement Approach

### B. Indicative programme and engagement plan

A carefully curated mix of engagement activities will be provided to a broad range of stakeholders. To commence the programme efficiently, appointed school cluster coordinators will act as a single point of contact for 10 schools, assisting with the appointment of school sustainability champions and organising online meetings, site visits, surveys and required datasets. Introductory webinars and workshops will be held for all schools to set expectations and build trust within the team, fostering a sense of community and excitement.

#### Engagement Day 1, 2 and ongoing engagement activities and communications

The first engagement day will integrate engagement and learning with live surveys, audits and optimising controls, with site walkarounds with premises managers, pupils and SLT, and the organisation of energy monitoring displays.

The second engagement day will be a day-long “hive of activity”. The team will deliver concurrent activities in schools including: a pop-up office allowing pupils to learn about the live decarbonisation planning works happening at their school through direct engagement with project architects and a range of exciting activities as shown in the drawing below.



Figure 3 - Hive of Activity (Engagement Day 2)



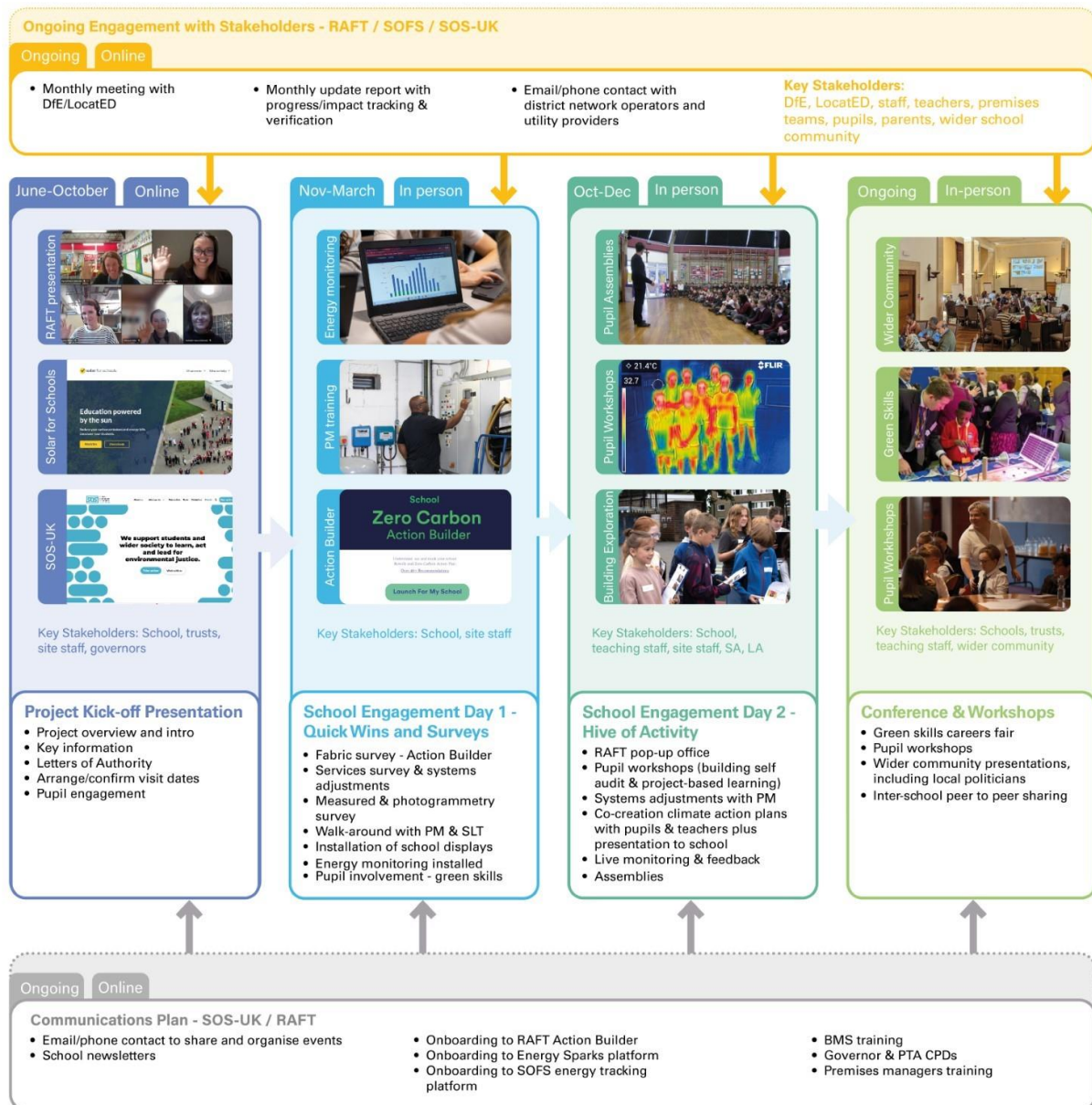


Figure 4 - Engagement Timeline

To ensure the engagement programme is adaptable and sensitive to the fact that capacity for engagement will vary, each school will be provided with a 'menu of activities', allowing for a bespoke and tailored approach. Additionally, regional conferences will unite primary, secondary and tertiary students with leading experts in the built environment and sustainability sectors, alongside local stakeholders including MPs, councillors and community energy groups. A cross-curricular, pupil-centred approach will connect technical architectural projects with broader socio-political discussions about the climate emergency. This interdisciplinary model will create a learning legacy of engagement that exists beyond the proposed activities by empowering pupils, encouraging peer-to-peer discussion and embedding project-based learning into the curriculum. The range of school engagement activities include:

- In-person site visits/walk arounds, including Matterport scanning, boiler room visits and ASHP 'sitings'
- Online workshops, webinars, drop-in sessions, online surveys to school staff and families
- Information provided about engagement activities for school newsletters

- Email/phone contact with stakeholders (schools/ DfE/Located, Statutory Authorities)
- Access to online teaching resources and guidance
- Introductions to other sustainability groups
- Regional school conferences
- Peer-to-peer engagement through the SOFS 'Energy Ambassador' scheme
- RAFT 'pop-up office' based within school buildings
- Co-created development of Climate Action Plan sessions
- Green careers assemblies for secondary schools and the college.
- Use of equipment such as drones for Solar PV, thermographic cameras to follow the heat and borescope to inspect wall cavities.

### C. Management and Reporting Structure

The management and reporting structure is designed to ensure clear communication, accountability, and timely delivery of all project milestones. The structure will facilitate effective stakeholder engagement and ensure that all parties are kept informed and involved throughout the project lifecycle.

#### Project Management Team:

- **Stakeholder Engagement Lead (RAFT):** Focuses on maintaining strong relationships with all stakeholders, including schools, governing bodies, statutory authorities, and the DfE. Organizes regular meetings, workshops, and communication updates to ensure stakeholder needs and concerns are addressed promptly.
- **Engagement Manager:** Handles day-to-day operations, coordinating activities across different schools and colleges. Ensures all deliverables are met within required timescales and manages the project team, including teaching staff, site staff, and external consultants.
- **School Cluster Coordinators:** Dedicated and consistent points of contact for each school will be provided by RAFT (2 coordinators), SOFS (2 coordinators) and SOS-UK (1 coordinator).

#### Reporting Structure:

- **Monthly Stakeholder Meetings:** Bring together representatives from different types of schools and colleges, trusts, local authorities, and statutory authorities to review progress, discuss challenges, and plan upcoming activities.
- **Quarterly Review Sessions:** In-depth analysis of project progress, including a review of energy usage and carbon emissions data. Involves participation from teaching staff, site staff, and pupils to ensure a comprehensive understanding of the project's impact.
- **Impact Report:** Produced at the end of each basket, summarising achievements, lessons learned, and areas for improvement. Shared with all stakeholders and includes detailed analysis and recommendations for future projects.

#### RAFT Zero Carbon Action Builder Platform:

The RAFT Zero Carbon Action Builder Platform is designed to help schools and colleges transition towards efficient, zero carbon buildings through practical, outcome-led actions. The Platform adds significant value by empowering schools with the tools and knowledge to take actionable steps towards decarbonisation, enhancing collaboration among stakeholders, improving efficiency, creating a legacy of sustainability, and offering robust tracking and reporting features to monitor progress and make data-driven decisions. By leveraging this platform, schools can achieve their decarbonisation goals, create a positive environmental impact, and inspire future generations to embrace sustainability.

#### Communication Channels:

- **Dedicated Project Portal (Padlet):** An online portal, familiar to schools, will be established to provide a central repository for all engagement-related documents, reports, and updates. Stakeholders will have secure access to this portal to stay informed about project progress.
- **Email and Phone Support:** A dedicated email address and phone line will be available for stakeholders to raise queries, provide feedback, and request information.

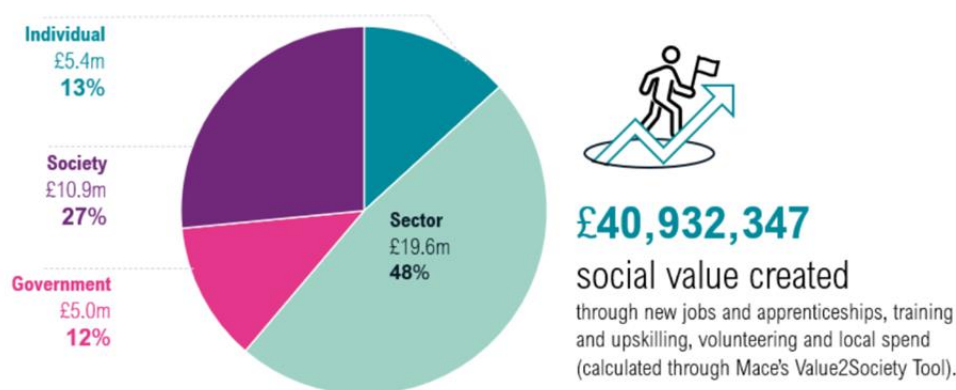
- **Newsletters and Bulletins:** Regular newsletters and bulletins will be distributed to keep stakeholders informed about key developments, upcoming activities, and success stories.

#### How we will measure the impact of our Social Value

- To measure the impact of our social value, we will utilise our inhouse Value2Society tool in partnership with Route2, which monitors performance against targets such as apprenticeships, training opportunities, work experience, and community engagement. We will provide quarterly data to report and measure progress. At the end of the programme, we will create a social value statement, transferring relevant information for long-term access and hosting.
- We will focus on educational attainment across primary, secondary schools, and colleges by targeting key KPIs. Following the pilot of Basket 1, we will conduct workshops with the client to review, refine, and focus on KPIs that support attainment, ensuring our social value initiatives effectively enhance educational development.

**Evidence:** Mace, as the Client Representative for the MOJ, is managing the delivery of four new prisons and various upgrades, supporting decarbonisation and social value outcomes to rehabilitate prison leavers and reduce reoffending.

Mace has developed Social Value KPIs to measure socio-economic benefits across all programmes, using the Value2Society tool to track and measure these inputs:



Our approach aims to improve school building performance and promote green job opportunities for students. By leveraging the Value2Society tool and focusing on key KPIs, we will ensure our social value initiatives enhance educational attainment and development across all levels of education.

#### Partnership Approach:

- **Consistency:** Provide consistency for the community and stakeholders with robust yet agile processes and procedures.
- **Single Point of Contact:** Assign a single point of contact for each school, trust, or region.
- **Regular Updates:** Offer regular progress updates and opportunities to engage, ensuring stakeholders feel part of the journey and are fully informed of planned works.
- **Engagement:** Win hearts and minds across the school community and take stakeholders on the project journey.
- **Dialogue:** Establish dialogue so individuals, groups, or organisations can contribute ideas about the project as it develops.
- **Information Sharing:** Share information and raise awareness, being a good partner.
- **Legacy:** Leave a positive legacy through behaviour change and social value creation.

By implementing this robust management and reporting structure, we will ensure that all stakeholders are engaged, informed, and actively involved in the successful completion of the Basket 1 deliverables, as well as the ongoing services for Basket 2 and Basket 3.

**Word Count:** 1945 words



# 3

## DELIVERY PROGRAMME

**Criterion: Detailed and comprehensive delivery programme to meet project timescales.**

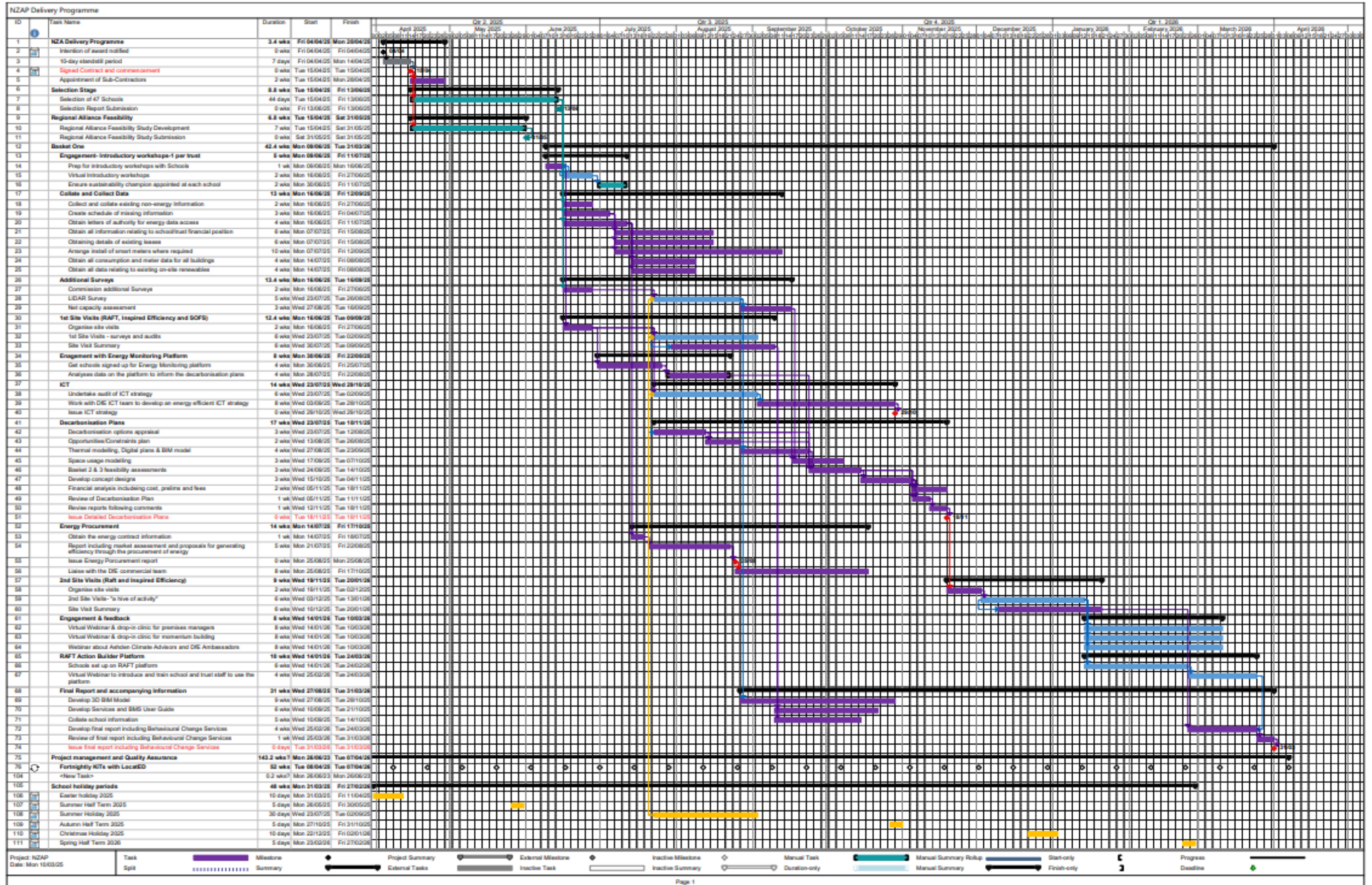
**Question** Please provide a detailed delivery programme, in the form of a Gantt Chart, detailing how the project will be delivered to meet the timescales, outputs and actions in the Specification. This response is limited to Basket 1 deliverables.

The delivery programme shall include the following elements

- a) Project Milestones e.g. key project delivery check points and gateways.
- b) Lead in periods e.g. lead in periods of the supply of engineering/optimisation services or building surveys
- c) Procurement and delivered of proposed site interventions, including where appropriate any statutory consents required and;
- d) Operational requirements e.g. consideration for school term dates and operational hours

Word Count: One A3 page

# 1. DELIVERY PROGRAMME





# 4



## QUALITY ASSURANCE

**Criterion: Provision of quality assurance throughout the delivery period.**

**Question** Please explain how you will deliver the project in a way which ensures quality assurance and meets the Authority's quality assurance requirements during Basket 1 and Basket 2/3.

The response should include the following elements

- a) Which long-term monitoring systems you will implement
- b) How you will provide training to site staff to operate interventions; and
- c) How you will manage CDM and HSE requirements throughout the delivery of the interventions

Word Count: 2,000 words max.

## 4. QUALITY ASSURANCE

### Delivering Service Excellence through governance and structure

We will develop a standard set of KPIs, to enable reporting through a dashboard to act as a Quality Assurance reporting tool enabling us to identify trends, track progress, highlight opportunities and share lessons learned across the programme.

Mace and our sub-contracted delivery partners place service excellence at the heart of everything we do. Ensuring quality assurance in the delivery of Basket 1 and Basket 2/3 (as required) is captured in both the curation of our expert team of specialists, further strengthened by the overall project and programme governance structure we have in place. We have established a culture which ensures all the project delivery team are responsible for quality. This is further evidenced with our ISO 9001 accreditation for Quality Management Systems (QMS).

In accordance with the ITT's Quality Assurance outputs, we will ensure success via:

#### 1. Monthly Reporting that provides updates on key project metrics

Our Quality Assurance & Governance process will include (but is not limited to).

- **Continuous Resource Management:** Mace and Mott MacDonald will ensure necessary project resources are provided, mapped to the correct skills and accreditations, and responsibilities are clearly defined. We will continuously review partner capacity and resolve any challenges.
- **Clear Quality Assurance Plan:** We will implement and maintain a quality management system (QMS) meeting ISO 9001 requirements. Our clear quality assurance plan will ensure the team delivers a successful project meeting the Authority's quality assurance requirements.
- **Service Excellence Gateways:** Assurance gateways will be embedded into the programme to review quality at all stages, report measurable quality assurance objectives, and ensure compliance with legislative and statutory obligations.
- **Measuring Key Performance Indicators (KPI):** We will use KPI benchmark data to evaluate team and supply chain competency, capturing details digitally and comparing programme, cost, and quality output data against benchmark projects.
- **Undertaking Project Service Reviews (PSR):** Monthly PSRs will be part of the Quality Management Strategy (QMS) and Quality Plan, driving quality outputs.
- **Customer Satisfaction Surveys (CSS):** CSS will ensure satisfaction with our team's service, delivery, communication, and QA procedures. CSS and PSRs will be reported to our Group Board for review and action.
- **Regular Check-Ins:** We will meet fortnightly with LocateED, summarizing progress and impacts in a monthly report.

#### 2. Ensuring Long Term Monitoring for Success

We recognise that funding is often a barrier to implementing legacy and long-term monitoring for schools. To overcome this and realise the savings, we have **committed and will inform schools from the outset that we will be paying their first annual subscription** for access to the Energy Sparks platform.

Each participating school will have access to both the Solar for Schools energy dashboard and Energy Sparks energy management tool account. The Energy Sparks platform provides half-hourly energy monitoring, data analysis, and action prompts, logging energy-saving measures. Additionally, the RAFT Action Builder platform



will enable schools to plan and log their decarbonisation and sustainability actions, tracking annual progress towards a zero-carbon target.

The three platforms will ensure long-term success via:

- **Giving Access to Data to Inform Action:** The Solar for Schools and Energy Sparks platform provides publicly visible dashboards, energy use graphics, analysis, and action recommendations for electricity and gas in terms of kWh, cost, and carbon. This allows school staff, pupils, governors, and stakeholders to track energy performance. RAFT's Zero Carbon Action Builder supports schools in collecting data and taking practical, outcome-led actions towards efficient, zero-carbon buildings.
- **Staying Connected:** Weekly emailed energy use alerts from the Energy Sparks platform keep staff updated on energy performance. The tool sets targets for reducing gas and electricity consumption, tracking performance monthly. The Action Builder is accessible and easy-to-use, structured around knowledge, action & planning, tracking, and engaging across the school community.
- **Community Campaigns:** SOS-UK and Energy Sparks run regular switch-off campaigns and competitions to keep schools motivated. The Energy Sparks analysis framework ensures data accuracy. The Action Builder (AB) engages key stakeholders through the platform, facilitating inter-stakeholder engagement across the school community.

### 3. Providing consistent and verifiable evidence of savings against targets/forecasts.

Targets/forecasts will be set out in the school decarbonisation plans and evidence of energy savings will be seen on the Solar for Schools and Energy Sparks platform with monthly tracking against targets and analysis of energy, carbon, and financial savings relative to the same period in the previous year.

The quality of the data is essential to inform action, and this will be verified by:

- **Automated Validation of Data** – Solar for Schools has automated monitoring in place to ensure that energy use data is collected reliably and enables staff to take proactive action in the event of data gaps. Any missing data can be collected and updated if possible or substituted to provide meaningful information to users.
- **Benchmarking Data** – The graphing and reporting systems allow for comparative period monitoring to be performed. Future development will introduce more automated alerting, reports and overall system analysis including baseload, per student energy across term time and weekends/holidays.
- **Managing Data Securely and Safely** – All data is stored in secured cloud services and infrastructure managed under our CyberEssentials accreditation. Security policies and access are fully managed across all data stores, servers and systems. No data not required for the performance management and monitoring of schools is collected and identifiable personal information is not collected and stored for students and pupils. Automated backups are put in place to prevent potential loss of data from managed databases and other storage.
- **Gathering Feedback** – Solar for Schools provides in person, face-to-face education for all schools it engages with. These visits not only provide assemblies, workshops and other educational resources, they are also used to talk to schools about energy saving initiatives and collect feedback on the effectiveness of education services and resources and any additional improvements and features that will lead to greater staff and pupil engagement and ultimately de-carbonisation.

### 4. Appropriate management of CDM and HSE requirements

Mace, as the lead supplier, will manage health, safety and wellbeing and are certified to ISO 45001 and have been recognised through a RoSPA Gold Award. RAFT, Inspired Efficiency, SOS-UK, Energy Sparks, BSI, SFS, Laser and Nexus are all industry leaders working with schools and have deep familiarity with school operations.

Our approach to managing CDM and HSE include (but are not limited to):

- Collaborative early-stage competent Principal Designer input led by RAFT to plan, manage and monitor the project, including both CDM and Building-Safety-Act duties, embedded from commencement to deliver compliant solutions.
- For Basket 2 and 3, this role will be fulfilled by RAFT/Laser/SOFS until appointment of the contractor, at which point the lead Technical Advisor/RAFT/Laser/SOFS will remain in an advisory and assurance capacity only.
- Live risk and health and safety registers will be maintained during the duration of the contract programme.
- Safeguarding Policies and Procedures due to the nature of the engagement (adult contractors engaging with young people) will ensure that the core staff and team working within the premises have been DBS Enhanced checked and we will liaise with each individual setting to ensure the local safeguarding policies are implements to ensure best practice delivery.
- Visit preparation includes reviewing site information in advance (including asbestos) to manage safety of our team, school staff and pupils during visits. All visiting staff will have enhanced DBS (Disclosure and Barring Service) checks.
- All team members have asbestos awareness, safeguarding and work-at-height awareness training and experience of working in operational schools.
- Localised fabric investigations or MEP tweaks/repairs will be based on established method statements and adapted following collaboration with schools on specific locations, timings and risk elimination and mitigation.
- Decarbonisation plans will include consideration of school specific CDM risks and likely compliance risks related to the context, condition and measures being proposed.
- Schools have varying awareness of their statutory duties as potential future clients. Decarbonisation plans will include reference to this to help embed safety and compliance within continuing project briefs.
- The team will collaborate with school staff ahead of engagement sessions to identify and eliminate risks specific to the school or needs of the engagement group.

#### 5. Suitable verification of completion of all works.

Our approach to ensuring suitable verification and completion of all works will include:

- **Delivering Informed Handovers** ensuring that the end user is comfortable and upskilled to operate the building systems and reinforcing that the supply chain deliver the required handover and aftercare requirements.
- **Open Communication Channels** recognising the importance and benefits of open transparent communication between all parties. We strive for this not only with you LocatED as our client, but also with contractor(s), Responsible Bodies (RBs) and end users.
- **Lessons Learned** – to continuously deliver a high-quality service we will apply lessons learned across all projects ensuring any knowledge gained is shared across the supply chain to improve the delivery of all projects.
- **Gathering Evidence** of completed works provided via the monthly reports. We will complete a formal monthly report for each project and hold regular Keep in Touch (KIT) calls with the dedicated project team on issues, risks, and progress against programme to ensure key actions are closed out in a timely manner.
- **Collating Data** to Verify the savings achieved via Solar for Schools, Energy Sparks and RAFT Action Builder Platforms.
- **Empowering End Users** via dedicated platforms and allow schools to log their actions and works undertaken.



- **Compliance and Assurance** reviews validating compliance with the technical standards set out from inception to completion of the Basket 1, 2 and 3 services. We will have Technical Assurance reviews and gateways along the entire project life cycle to enable us to have an early identification or warnings of non-compliance or issues which can be appropriately addressed.
- **Site Inspections.** The Basket 2/3 intervention works delivered by the supply-chain will be independently inspected by our technical assurance team and regular safety inspections will be undertaken by our CDM advisors. Site inspection reports will highlight any non-conformances, risks, or observations.

## 6. Providing training to on-site personnel

RAFT, Inspired Efficiency, Solar for Schools and SOS-UK have extensive experience engaging with all school stakeholders to support a greater understanding of both building fabric and energy generation and use leading to long-term energy efficiency.

**Behaviour changes and training programmes delivered by RAFT (with input from Inspired Efficiency and Solar for Schools) will include:**

- Guided 'Know-Your-Building' audit & training
- Estates/Premises Manager Training
- Engagement workshops in school with staff and pupils
- Action Builder Platform, with guidance & resources
- Zero Carbon Momentum-Building capacity-building and legacy
- Provision of simple "one-pagers" to enable a greater understanding of the operation of equipment.

**Specific training delivered by Inspired Efficiency:**

- Heating System optimisation guidance
- Where relevant BMS/controls advice and on-site training
- Guided interventions and maintenance work to support on-going operation.

**SOS-UK training with teachers and pupils will include:**

- Connecting net zero projects to the curriculum, locking in learning legacy for current and future pupils
- Supporting teachers to integrate content across all subjects, making climate action relevant to all students, across all disciplines
- Facilitating project-based learning, using the school building as a 'living laboratory' for learning
- Developing climate action plans, together with the whole school community, and in line with the DfE strategy

**Solar for Schools teacher website**

- Extensive training and resources on the Solar for Schools teacher website with easy access, data provision, and navigation

**Other RAFT/ Solar for Schools activity:**

- Identification of immediate no/low-cost fabric actions & upskilling estates/premises managers and other school staff to address actionable energy savings, services upgrades, and fabric maintenance.
- Engaging with national and local climate education providers to amplify outcomes and legacy by continuing our programme, continuing the upskilling and training of the school community.
- Capacity-building and legacy via workshops, seminars, peer-to-peer learning, and the creation of connected action groups through conference networks

### **Ensuring Quality for End Users**

To ensure quality of the engagement sessions within Basket 1, RAFT has established processes that include incorporating feedback from previous sessions, internal review of materials and scaffolding sessions content and agile adaption of the session during the delivery if needed, led by experienced qualified teachers within RAFT/ Solar for Schools/SOS-UK teams.

**Word Count:** 1990 words



# 5



## RISK MANAGEMENT

**Criterion: Detailed risk management strategy to manage and mitigate risks**

**Question** Please provide a detailed risk management strategy for the successful delivery of the services.

The risk management strategy should include the following elements

- a) Risk identification; detail the top ten risks and;
- b) Mitigation Strategy: detail how risks will be identified, measured, tracked, assessed and mitigated throughout the project.

Word Count: 1,500 words max.

## 5. RISK MANAGEMENT

We recognise that the NZA-CEP (Net Zero Accelerator Community Energy Project) is a significant undertaking with multiple stakeholders across 47 premises. Mace and Mott MacDonald have extensive experience in developing and implementing robust risk management processes to support major complex frameworks, ensuring quick escalation of any project risks. Our proactive approach is based on experience and lessons learned from previous projects for the DfE/LocatED.

Our team is structured to ensure sufficient resource capacity and business continuity. Led by Mace and supported by Motts, the SMEs supporting Basket 1 deliverables (RAFT, Inspired Efficiency, Solar for Schools, Laser Energy, Nexus, SOS-UK, and Building Spatial Intelligence) can be supplemented by additional local resources from Mace and Motts as needed to ensure delivery and service continuity.

Business continuity management is embedded within our risk management framework. Our approach follows the principles of ISO 22301:2012 Business continuity management systems. We have Business Continuity Plans (BCPs) in place which are regularly reviewed and audited to maintain the highest and most consistent level of service delivery. BCPs outline actions needed to be taken in the first few days after the incident occurs, and the framework for dealing with the longer-term actions.

### Risk management, processes, and procedures

At the outset of the project, we will have a detailed risk workshop, "lessons learned", and "common pitfalls" session with the full team to share and learn from our collective experience, further building on the risks provided here.

Our Project Managers, XXX from Mace and XXX from Motts, will lead this meeting and collate ideas from across the entire team. The risks will be recorded, analysed and assessed for likelihood and impact. As a team we will then discuss how risks can be managed and mitigated. The outcome of the workshop will be recorded, and each risk assigned to a member of the team who will be responsible for that risk.

Our project managers will maintain a programme risk register. Key risks will be tracked, regularly updated, and highlighted in our monthly client reports and meetings. We won't just report risk to DfE/LocatED; we will actively manage risk to reduce the impacts and mitigate the effects, regularly monitoring and updating risks at a programme level and working with the teams to implement the mitigation strategies.

We will prioritise early identification of project risks. We recognise that it is essential to gain a comprehensive understanding of the impact that risk events could have on project outcomes. We will assess the potential impact of each risk on time, cost, carbon and quality. We will consider ways in which we can prevent risks from occurring and ways to reduce the impact should they occur, including contingency planning.

Each of our suppliers will be encouraged to raise risks as soon as they have been identified. They will raise the issue with the designated risk manager from Mace and Mott MacDonald. This will ensure that no risks are without a mitigation and action.

### Risk Identification

Our joint management delivery team hosted an initial workshop with all delivery partners, to review the risks inherent and currently anticipated in the delivery of the services.

For basket 1, the top 10 risks arranged in priority order are in the table below, along with our proposed mitigation strategy for each risk.

These risks will be regularly reviewed, updated and assessed at risk workshops to ensure each risk is identified, measured, tracked, assessed, and mitigated throughout the project to minimise impact.

Table 1: Top Ten Risks of Basket 1

Nr	Risk Description	Risk Management Strategy (identify, measure, track, assess, mitigate)
Top Ten Risks of Basket 1		

1	Delays in procurement of additional surveys to complete information gaps	Team to review existing information early in programme and instruct additional surveys to avoid delays and to maximise use of holiday periods to obtain data efficiently and with reduced disruption.
2	Delays in the installation of smart meters to delay the receiving of data	This will be mitigated through installation by Solar for Schools of an independent monitoring and reporting system on every school meter. To support onboarding to Energy Sparks we will immediately contact schools to ensure smart meter data is available, arranging for smart meters to be installed where missing, and paying for half hourly data where that is not being provided.
3	Loss of key personnel in the team	Team members will share the knowledge and their experiences with their wider teams to ensure others are able to deliver if someone falls ill or leaves. Mace and Motts will provide additional resource to support where required.
4	Safeguarding of Pupils through adult contractors engaging with young people	We will ensure that core staff team working in the settings have been DBS Enhanced checked and will liaise with school settings to ensure local safeguarding policies are implemented and we deliver best safeguarding practice.
5	Where schools procure energy through their Local Authority (LA), and a Letter of Authority (LOA) is required from the LA to release the energy data, contract information or to get meters upgraded, the LA is reluctant to engage.	Focus on obtaining LOAs and engaging with LAs as early as possible, so that any initial barriers can be overcome at the start of the project. Include in programme.
6	Schools don't want to accommodate the education workshops sessions due to timetabling and curriculum constraints. This is likely to be more problematic at secondary schools.	Offer schools flexibility in how the workshop sessions are delivered, with the opportunity to split the workshop sessions across different year groups or delivered more intensively in off-timetable days.
7	School staff don't want to engage with the behaviour change programme due to disinterest or limited time availability.	All schools will have a key contact and school co-ordinator who will find the school champion to work with to deliver the programme. Winning hearts and minds will be at the forefront of all engagement with the schools. Initial training and induction sessions for key stakeholders, effectively communicate the cost saving opportunities for the school of simple no/low-cost behaviour change occurs. Use pupil power to maintain engagement with behaviour change.
8	Conflicts with hot water energy efficiency leading to higher energy use	Work with school premises teams to improve their understanding of Legionella risk management strategies that require minimal energy use outside of school hours.
9	Schools are not willing to/do not appreciate the benefit of making the proposed changes from decarbonisation plans	Work closely with all school stakeholders to explain the benefits and get their buy-in and manage the process, making it as easy as possible for them to implement any changes. Hosting initiation meeting with school leadership and key people from the team will gain the buy in and mitigate this risk.
10	Ability of the team to deliver the services at all sites within the programme required.	A detailed delivery plan with suitable contingency will be implemented at the outset of the project. Mace and Motts will provide additional resource to support where required.

We have also reviewed the potential risks for Baskets 2 and 3 and highlighted the top five risks in table 2.

Table 2: Top Three Risks of Basket 2 & 3



Nr	Risk Description	Risk Management Strategy (accept, mitigate, transfer)
<b>Top Five Risks of Basket 2 &amp; 3</b>		
1	Lack of government funding, and lack of funding related to capital works should funding applications be unsuccessful	Whilst Basket 2 solar is reliant on DfE capital funding, our specialists RAFT and Inspired Efficiency will submit funding applications for relevant work in basket 2 and 3. They both have a track record of experience in delivery of PSDS applications. This will ensure consistency in the programme and quality of the submission.
2	Grid Upgrades	Solar for Schools and RAFT will make grid applications for the works in Basket 2 and 3 and engage with the grid network companies to try to reduce time delays for any works and costs.
3	Risk that works fall outside of permitted development and a planning application is required.	We will review works and bring in advice from planning specialist to confirm whether a planning application will be required for the work. If a planning application is required, then a pre-application will need to be submitted as early as possible in basket 2.
4	Underlying building condition issues mean investment in improvements is not worthwhile. E.g. Roof is sound and suitable to install PV cells	We will review condition data reports and inspect each block to confirm that each building is suitably sound for improvements to be made and is appropriate for investment.
5	Safeguarding concerns as works will be happening on a live school site	TA to review programme and scope to ensure robust health and safety and safeguarding procedures are in place. Most disruptive work to target school holiday periods or to be done outside of school's operating hours.

**Word Count:** 1476 words

# 6

## S O C I A L   V A L U E

**Criterion: Social Value – Theme 2: Tackling economic inequality. Policy outcome: Create new business, new jobs and new skills.**

**Question** Please explain how you will support educational attainment relevant to the Contract, including training schemes that address skills gaps and result in recognised qualifications.

The response should include the following

- a) A description of activities to support sector-related skills growth and sustainability in the contract workforce; and
- b) An explanation of how you will actively commit to engaging with pupils in schools. For example, careers talks, apprenticeships, work experience and presentations to integrate communities into the delivery of the project.

Word Count: 1,000 words max.

## 6. SOCIAL VALUE

Our dedicated team is committed to supporting educational attainment and skills development for this contract. Our specialist experience in delivering social value initiatives enable us to deliver outstanding education initiatives aimed at tackling economic inequality.

### Two stage approach

During Basket 1, we will create a training and delivery plan to enhance educational attainment for the contract workforce and the community. This plan will form the foundation of our Social Value Strategy, focusing on key KPIs such as apprenticeships, vocational training, workforce upskilling, and educational workshops. A dedicated Social Value Manager (SVM) will oversee the delivery, monitoring, measuring, and reporting of our commitments.

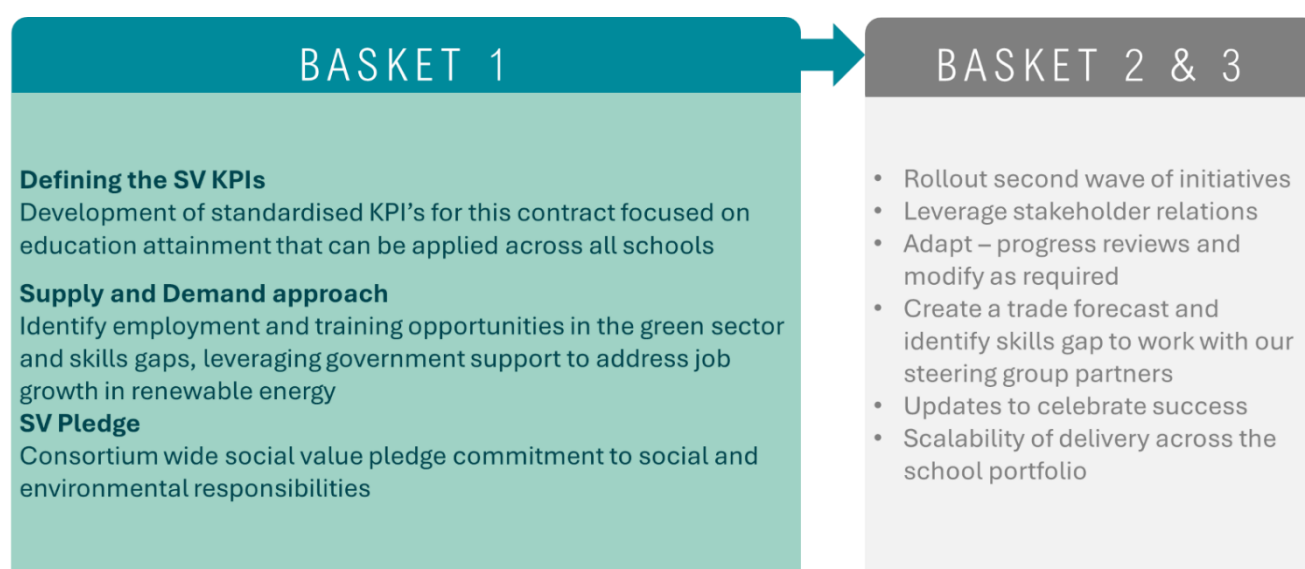


Figure 1: Two stage approach

### A. Supporting Educational Attainment Relevant to the Contract

#### Our approach

By addressing skills shortages where green skills vacancies are projected to soar to 241 million by 2030. We will implement targeted training and development initiatives to bridge the skills gap and empower the workforce through the following initiatives:

- Partner with local educational institutions and training providers to offer apprenticeships and vocational training.
- Provide a comprehensive training programme for the workforce, teachers, and premises managers.
- Include essential, professional, and personal development training.
- Deliver retrofit workshops, sustainability sessions, and guidance on decarbonisation and energy efficiency.
- Upskill the existing workforce through industry-aligned accredited programs.

### Our Commitment

As a team we will carry out a training needs analysis at the outset of the contract to identify skills and training requirements of the workforce to ensure all training requirements are completed for our collective team. The training programmes we will deliver are detailed below (Figure 2)

A Supporting skills growth, sustainability and educational attainment			
Action	Metrics	Basket 1	Basket 2 & 3
Summer Placements, Work Placements and Apprenticeships: Level 3 -5 plus	<ul style="list-style-type: none"> <li>5 apprenticeships</li> <li>5 internships</li> <li>6 work experience opportunities (including T-Levels)</li> </ul>	✓	✓
Increasing opportunity and accessibility	<ul style="list-style-type: none"> <li>No. of staff from underrepresented backgrounds</li> <li>No. of staff facing barriers/challenges to employment</li> </ul>	✓	✓
<b>Training and Development</b> Business to Business training supporting capacity and capability building CPD training for teachers and premise managers Profession Qualifications (CIOB, ICE, CIBSE) project management and NEBOSH H&S Management. Solar PV and Electrical Energy Storage Systems Level 3, Air Source Heat Pump Systems Level 3.	<ul style="list-style-type: none"> <li>12 sessions minimum</li> <li>Hours of training</li> <li>No. of staff members</li> <li>£ Invested in training/upskilling</li> </ul>	✓	✓
V2S GENERATION FORECAST			
£809,296			

Figure 2 Forecast of value2society generated

### Supply and Demand Approach

Using a 'Supply and Demand Model,' (Figure 3) we will collaborate with Trusts, the team, and the supply chain to support school delivery. Our SVM will leverage regional groups to endorse apprenticeships for green careers, inspiring students and delivering KPIs.

Our established regional steering groups provide us with existing connections to key stakeholders, including CITB, DWP, Green Schools Revolution, Teach the Teacher, Construction Youth Trust, Careers and Enterprise Company, Green Skills Hubs, and Skills Centres. These relationships will be utilised to identify opportunities for upskilling, training, and funding within the context of NZA-CEP.

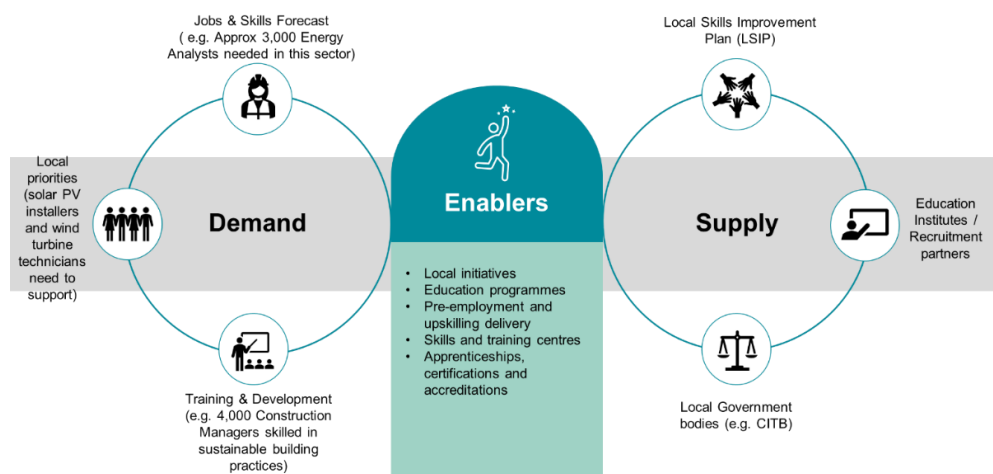


Figure 3 Supply and Demand model.

## B. Engaging Future Generations

We will implement a STEM program to help students address climate change through interactive workshops and activities on renewable energy, biodiversity, and circular economies. Our education outreach will equip students with essential soft skills like problem-solving, teamwork, and leadership, helping schools develop a holistic approach to sustainability and preparing students to make informed career choices. (Figure 4).

SOS-UK supports Teach the Future, advocating for climate education and green skills in vocational courses. SOS-UK promotes sustainability practices, integrates climate education into the curriculum, and assists in policy lobbying.

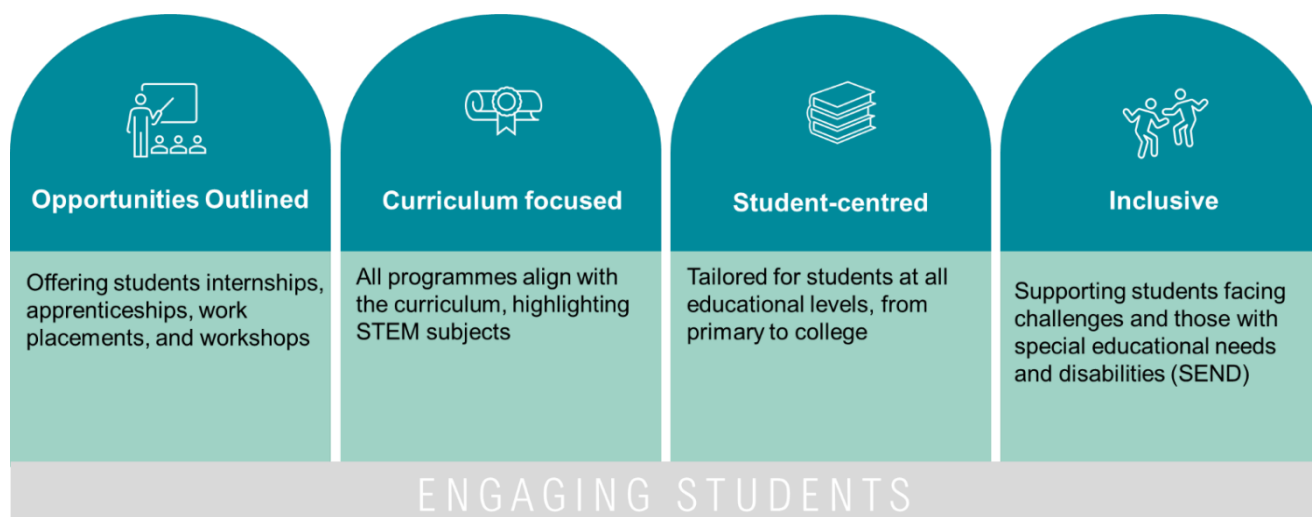


Figure 4. Student Engagement approach

### Commitment

Our multi-disciplinary team and partners commits to engaging with students across all schools. We will provide a suite of activities for each school to select the most relevant for their students. We can tailor these to meet the learning styles and needs of students.

Suite of activities:

- Bespoke pre-employment programmes
- Careers talks, assemblies and mentoring opportunities
- Teacher & Parental encounters
- Site visits
- RAFT pop-up office
- Online workshops/webinars
- Online teaching resources
- Regional school conferences
- SOFS 'Energy Ambassador' scheme
- Customised Climate Action Plan sessions

### Added Value: Hive of Activity

RAFT, SOS-UK, and SOFS will offer the delivery of concurrent activities at schools. (Figure 5) These include a pop-up office for decarbonisation planning, interactive presentations on a Decarbonisation Plan and advisory sessions for all to co-develop climate action plans.





Figure 5 Engagement programme

Our education outreach delivers exceptional value by supporting teacher development, engaging parents and the community, and implementing skills-based training, ensuring impactful initiatives.

**Word Count:** 999 words

