

Schedule 4 (Tender)

Building Futures Together

LocatED - Net Zero Accelerator Community Energy Project

To manage the delivery of decarbonisation interventions for one of three 47-school/college

Lot 3: North West

Technical Response - Document 1

March 2025



Barker

Who we are



Our locations

London
Essex
Cambridge
Birmingham

Barker provides for clients wanting to create future-proof, sustainable spaces where people work, play and learn. Barker provides an integrated property consultancy from concept, to build and beyond. This is done by adopting visionary thinking and a collaborative partnership with clients.

Our Services

Architecture & Design
Building Surveying
Condition Improvement Fund
Conservations & Historic Buildings
Decarbonisation Advice
Decarbonisation Delivery
Decarbonisation Strategy
Education Funding
Facilities & Estate Management
Project Management
Quantity Surveying
Structural & Civil Engineering
Sustainability

Contents

LocatED

Net Zero Accelerator Community Energy Project
Technical Response - Document 1

Technical Response Contents

- Q1 Methodology
- Q2 Engagement
- Q3 Programme
- Q4 Quality Assurance
- Q5 Risk Management
- Q6 Social Value

Q1 Methodology



Barker

Q1 A high quality delivery methodology which will meet the Authority's requirements

Question 1: Please provide your delivery methodology explaining how you will meet the Authority's requirements set out in the Specification. *Word count: 5,000 words max. The organogram is excluded from the word count. 45% Weighting*

OUR TEAM AND CONSORTIUM APPROACH



Our bid is led by Barker; a leading consultant providing decarbonisation strategy, technical advice and large-scale delivery of decarbonisation retrofit programmes to the education sector.

Barker proposes to deliver this commission by combining our skills and experience in a consortium with **five leading companies**, all of which are currently working on the NZA Pathfinder and also extensively within the education sector in the arena of decarbonisation, energy management, and behavioural change management.



This **team remains unchanged** from the Net Zero Accelerator Feasibility and Pathfinder Programme, we see this as a **unique benefit** to LocatED as the team have proven they can deliver well, at pace and innovate.

The combined education-sector credentials and experience of the team being offered, align closely to the requirements set out in the ITT and we are confident in our ability to provide high quality advice and solutions as part of the Net Zero Accelerator Community Energy Project. We feel that the collective experience and deep sector knowledge of our team will provide best-in-class expertise to deliver a genuinely transformational programme with schools at the heart of its design. This will be built on the excellent feedback we have received on our delivery of both the Feasibility and Pathfinder projects.

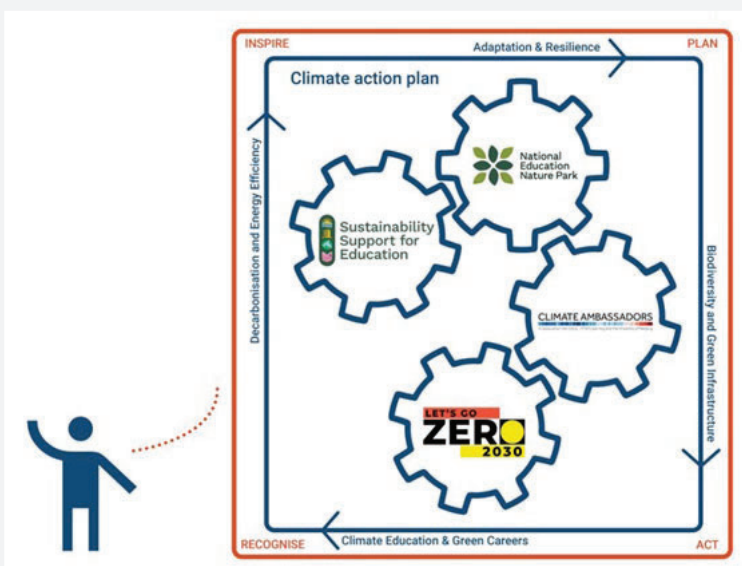
ALIGNING TO GOVERNMENT STRATEGY AND THE NET ZERO ACCELERATOR CONCEPT

As described in the **Department for Education's (DfE)** Sustainability Support Group Programme, we not only need to ensure education buildings and the service provided are resilient to climate change, but we must also engage children and young people in practical action to develop their understanding, skills, sense of agency and hope. There is an expectation that all education settings will have a sustainability lead and a holistic climate action plan in place by the end of 2025.

Through Let's Go Zero's interactions with these strategic initiatives, we are able to collectively drive momentum through the Sustainability and Climate Change Strategy pillars of Decarbonisation and Energy Efficiency, Adaptation & Resilience, Biodiversity and Green Infrastructure, and Climate Education & Green Careers.

Key to the success of the Net Zero Accelerator programme is helping schools and colleges take control of their own net zero journeys and drive the behavioural change needed to meet net zero that goes hand in hand with the technical interventions across the school estate. Our consortium has had great success in this, delivering the NZAP Lot 1 Pathfinder, with our Climate Action Advisors receiving very positive feedback from their engagement to count their carbon and produce Climate Action Plans.

The overarching plan of this next stage in the programme is to trial the regional delivery model and ultimately help define the financial and operational plan for a national programme delivered across the **nine Governmental regions**. More will be learnt by engaging a larger cohort of schools, how they will be prioritised, working with different responsible bodies including local authorities, and how colleges may require a different approach to engagement and participation.



Our intention for this contract will be to build upon the learnings of the Pathfinder and drive exemplar models across:

- Inspirational engagement across a broader mix of stakeholders, including community stakeholders and considering community energy opportunities
- Creating shared learning experiences and motivating stakeholders to make real changes to their behaviours that directly impact the reduction of energy consumption and carbon emissions
- Operational and organisational efficiencies
- Triage and communications blueprint
- Enable climate resilience and reduce waste
- Supply market engagement to drive best value and innovation
- Regional connectivity, joining up opportunities for community energy projects
- Social value targeting inward investment, skills development and local wealth creation

We have designed the programme methodology to be at the forefront of retrofitting the education estate, and firmly support the key action areas of the DfE strategy and vision as the department for opportunity. As such we are not purely focussing on Decarbonisation but will seek to join up initiatives for the three other vital areas.

- **Decarbonisation and Energy Efficiency**
- **Climate Adaptation and Resilience**
- **Biodiversity and Green Infrastructure**
- **Climate Education and Green Skills**

Continuing the work completed by the Barker Consortium in the Feasibility and Pathfinder Stages, we are committed to further developing the "Net Zero Accelerator Hub" concept, which received positive feedback. Through this project and any subsequent Basket 2/3 work, we will further test the key outcomes detailed below.

- Driving the maximisation of **community and clean energy projects**
- Providing a **low burden service** to address condition and energy efficiency, delivering of decarbonisation interventions for the long term
- Facilitating the **delivery of measurable energy savings**
- Providing a service which **does not require significant time and resource for schools**

Whilst we recognise the Net Zero Accelerator Community Energy Project is focussed on interventions at 47 schools and including a college, we have designed our methodology to test the concept as if it were a national model “proof of concept”. Thereby preparing the foundations for further **scale up of clean community energy programmes at pace**.

WHY OUR APPROACH IS DIFFERENT

#1 Our school centric approach	The Consortium, composed of SMEs with deep market insight into the education sector, collectively works with over 6,000 schools, colleges and trusts across England. Our direct work with schools gives us intrinsic knowledge of how to deliver in this complex environment.
#2 Our independent advice	We are agnostic to technology, products, finance, and suppliers. This enables us to offer independent advice to responsible bodies, schools and colleges with full transparency. Our fundamental goal is to provide the best guidance that leads to optimal outcomes for their organisations and the communities they serve.
#3 Our track record of delivering at scale and pace	Our advice and delivery for DfE/LocatED during the NZA Feasibility & Pathfinder stages, and our ongoing guidance through this phase, will draw from our extensive experience in delivering community energy and decarbonisation projects at scale and pace within live education environments. Our team has successfully supported the delivery of over £75m in retrofit energy efficiency projects in schools & colleges.
#4 Our alignment with DfE Inspire, Plan and Act strategy areas	We are not solely focused on Decarbonisation and Energy Efficiency. Our passion lies in making a difference across all four strategy pillars. Therefore, we are closely collaborating with Let's Go Zero on behavioural change and with Blue Marble on Climate Adaptation, Resilience, and Biodiversity.

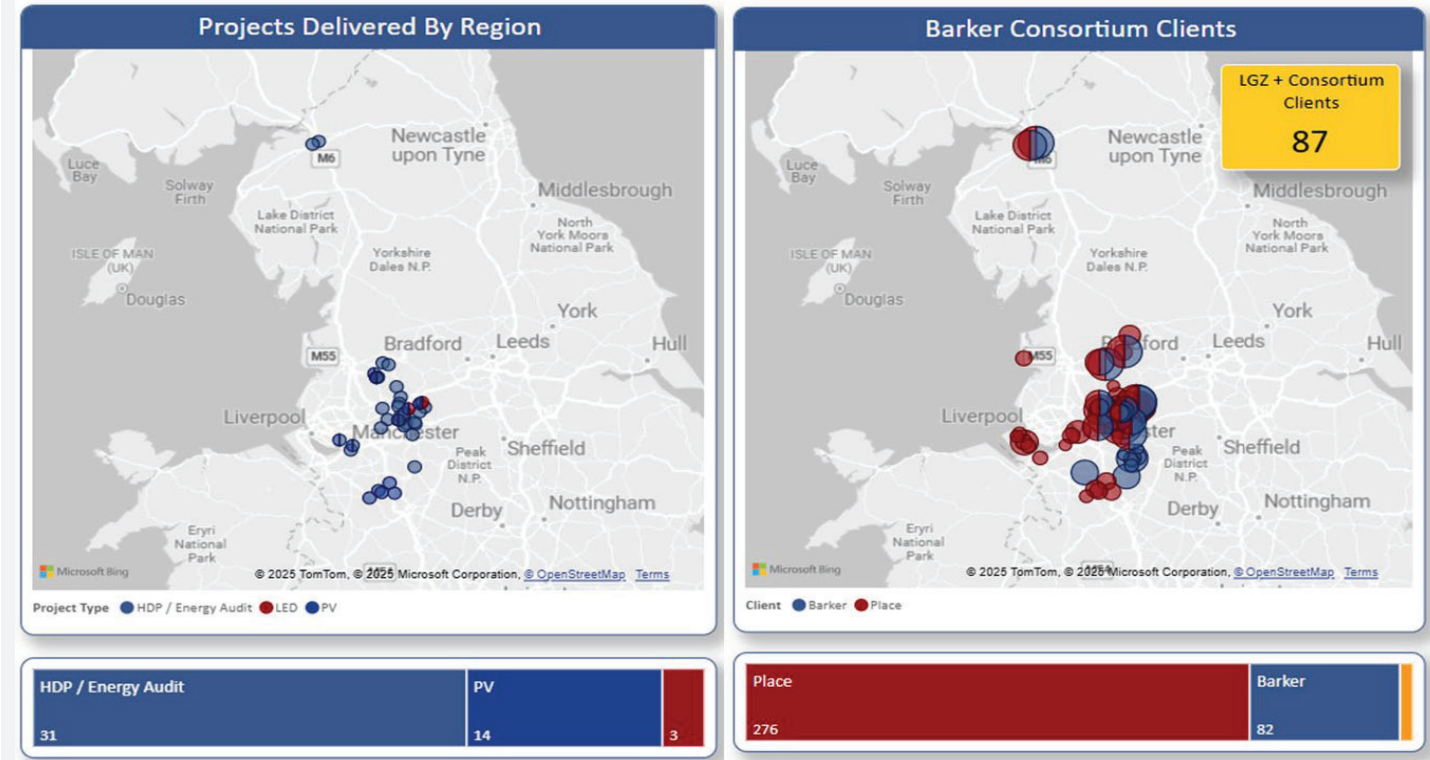
SECTOR KNOWLEDGE AND SUPPORT

Alongside physical project delivery, the Barker team are proud to be supporting the following education sector organisations in the arenas of estates, energy & sustainability.



OUR REGIONAL TRACK RECORD

As a Consortium we have a strong track record of delivery in the North West (Lot 3) region. This encompasses Behavioural Change Management, Technical Intervention Delivery, Net Zero Consultancy, Data Capture, Procurement and Supply Chain Management. The maps below show the footprint of past experience across the regions



North West

OUR TEAM ORGANOGRAM

ACCOUNTABILITY – CONSORTIUM STRATEGIC DELIVERY GROUP

This will constitute a **XXX**

project steering group and lead, guide and manage the entire consortium team.

DELIVERING BIM

In order to deliver the BIM element of the brief, we have selected to Partner with **School Property Matters** to support on the delivery of BIM. This enables us to continue the good work we have delivered on the Pathfinder and ensures we retain knowledge. They will not be formal Consortium Members but will act as a **Non-Material Sub-contractor** for this programme.

Alongside School Property Matters we have **also engaged with two other market leading BIM consultants** who work across the UK and overseas – XXXX. These additional suppliers and our **own five Barker**

BIM Consultants give us resilience and boost our ability to deliver at pace. Each have been consulted on the brief, provided commercial and quality submissions to Barker. This provides options, should we need to deploy additional/alternative resources for this key element of the project.

THE INTRODUCTION OF SPECIAL ADVISORS

As an evolution of our team and in recognition of the value that experts can bring to our Consortium, we propose to involve Special Advisors in various elements of the project. They will provide unique advice to the team which will help shape and evolve the solutions developed by Barker in the Feasibility and Pathfinder Stage in particular the areas of Regional Alliance, Funding, Community Energy, Colleges and Carbon Credits.

XXX

XXX are the leading body for sustainability in the post-16 education sector in the UK and Republic of Ireland. They've been promoting sustainability in post-16 education for over 20 years. Primarily a membership body, they serve 300 organisations whilst also working to change systems that enable sustainability action. XXX will support the Barker team in the knowledge areas specific to Colleges and Further Education, supporting us to ensure that this vital area of the education landscape is reflected in the outcomes achieved.

XXX

XXX is Head of Mid Corporate Team/Sustainability Lead in XXX team. He works closely on XXXactivity in the area of sustainability. Having been involved in the Barker Consortium team for the NZAP Feasibility Stage, XXX brings a wealth of experience in structured asset finance, particularly for sustainable technologies. We propose to seek input from XXX on key themes such as the Regional Alliance model as well as Clean Energy financing.

XXX

XXX has worked in the sustainability sector for over 15 years. Principally focused on energy, he has worked for private, public and third sector organisations. The Energy Learning Network is powering forward community energy projects across the UK – helping more groups launch or grow schemes that decarbonise the grid, and create instant benefits for local people. We propose to seek XXX expert knowledge in the Community Energy elements of this programme.

METHODOLOGIES

In line with the ITT requirements, we have outlined our proposed methodology for each of the project stages below. This draws upon our team's experiences from the Feasibility and Pathfinder projects as well as our ongoing and extensive portfolio of delivering net zero interventions across hundreds of schools and colleges outside of the NZAP programmes.

SELECTION STAGE METHODOLOGY

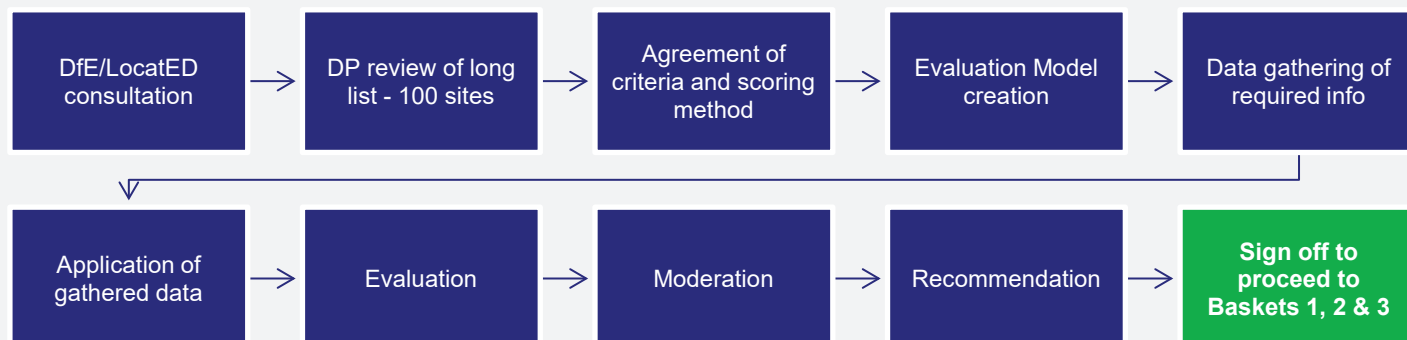
We have designed a methodology for site shortlisting/selection based on **three key principals**, as set out below:



These are further explained below:

Data-led technical evaluation	Empirical review of available data that supports site selection designed to identify sites with the highest potential for achieving maximum energy savings and energy generation potential. This will include evaluation of data including (but not limited to) DEC/EPCs, CDC and other available condition data, energy benchmarking data, available roof space etc. By scoring these factors on a site-by-site basis, it will enable site selection on a “best technical outcomes” basis.
Evaluation of social & community value	This criterion seeks to ensure that the social and community benefits are a key factor that influences site selection. This may include an evaluation of such factors existing community use, benefits of investment in the local area and proximity of local community assets that could benefit and areas of social and economic deprivation. By scoring these factors on a site-by-site basis, it will enable site selection on a “community benefit” basis.
Delivery risk reduction	Careful evaluation of site-specific factors that would reduce the ability to deliver the intended outcomes. This may include factors such as DNO risk, Landlords Consent, Planning Restrictions, Stat Consents, Cost Certainty, Condition Risk, H&S Risk, Access restrictions, supply chain risk. By scoring these factors on a site-by-site basis, it will enable site selection on a “risk managed” basis.

Our proposed triage process is as follows:



Whilst the above processes reflect our thoughts on how this stage could work, we are conscious that the DfE and LocatED will have their own ideas and views. We are committed to working collaboratively with the client team to develop this further and agree on an approach that meets all requirements. We can also offer all non-selected schools ongoing support from LGZ and their network.

Our input on the Pathfinder into the work completed by Deloitte and LocatED on the Basket 2/3 triage and evaluation models are good examples of how we can create truly innovative models when working collaboratively.

REGIONAL ALLIANCE FEASIBILITY

As described recently by the Department's Director of Education Estates and Net Zero, the proposed new estates management portal, which the condition, resilience and decarbonisation service may become a constituent part, *"will be a two-way system, so we can share data both through our cycle of condition data collection and surveys and things that estates professionals might be doing on site, and make sure that we are really thinking about where we should invest our money."* The portal will provide a "single door" between government, councils and trusts.

With this holistic approach for the Education Estates strategy framework, possibly best described visually as a Venn diagram where the intersection of the three overlapping circles of Estates Management; Condition, Resilience and Decarbonisation; and Build and Rebuild service offers; provides the regional foci of operational efficiency layered across data sharing and benchmarking, capital funding, project prioritisation, stakeholder engagement, programme capability and capacity, and supply chain management. The regional focus on local supply chains, reskilling workforces and generating apprenticeships, will contribute to place-based strategies supporting inward investment, growth and social impact.

Through a regional operational model, we have the opportunity to work with complementing organisations such as the Net Zero Hubs, Combined Authorities and Local Authorities, and potentially access other sources of funding from Government, the charity sector and private finance. For example:

- **Greater Manchester Combined Authority (GMCA)** – Powering Our Schools Programme (Case study below)
- The £288 million **Green Heat Network Fund (GHNF)** capital grant support for the development of new and existing low and zero-carbon heat networks
- The £80 million **Heat Network Efficiency Scheme (HNES)** supports performance improvements to existing district heating or communal heating projects
- **DfE Nature Grant** support.
- Local community energy investment such as <https://www.abundanceinvestment.com/invest/bath-and-west-community-energy>



Barker was appointed in 2024 to deliver the Greater Manchester Combined Authority's (GMCA) Powering Our Schools Programme; a flagship scheme working with its 10 Local Authorities aiming to install roof-top Solar PV arrays on a number of schools through this new Framework Agreement. After a successful procurement exercise, we were appointed to provide GMCA with support in developing the programme, including determining schools for inclusion and development of stage gate processes. This will progress to overseeing the works from feasibility to detailed design to installation, testing and commissioning. Through our innovative procurement, we managed to deliver Solar-PV at levels 30% lower than the market rate for the client.

Collaboration too, with the other Education Estates service offer pillars will be fundamental to the success of the framework, and we will develop a blueprint for how the condition, resilience and decarbonisation pillar will interact on crossover and complementing service aspects. These will be how estate management teams will enact more sustainable practices, and how these engage with the Good Estate Management guidance, encouraging sustainability and managing energy and water use. With at least one college included in the Lot organisations, we will consider alignment with the Standardised Carbon Emissions Framework (SCEF) carbon reporting as developed by the Environmental Association for Universities and Colleges (EAUC), whose CEO is one of our advisors.

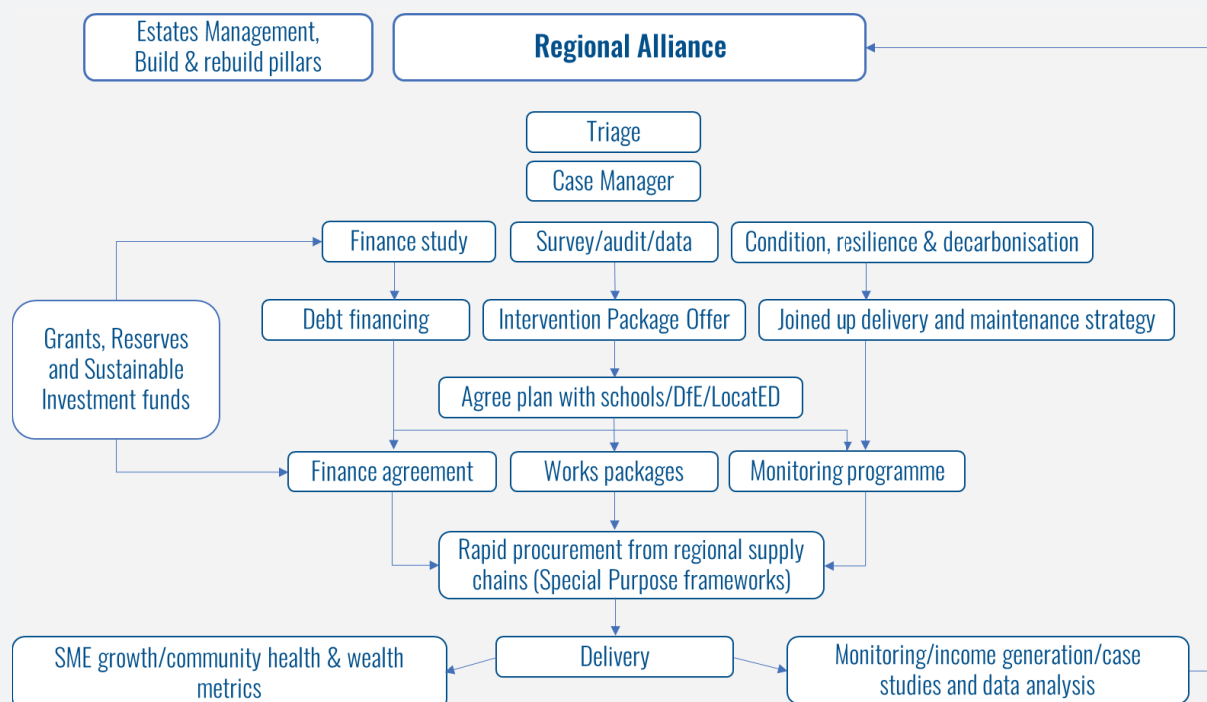
DEVELOPING THE MODEL

We appreciate that the Department will have developed a significant amount of thinking to the Regional Alliance proposition, as detailed in the ITT. We see our role to work with DfE colleagues and further develop optimal operating models to maturity, and the costs and resources required for establishment and operation. The Regional Alliance Feasibility business case will also allow us to expand upon our initial thinking outlined in our Net Zero Accelerator Feasibility Study report, where we described a regional roll-out model for NZAP and the efficiencies such a model could realise. We will build the business case detailing how this would attract funding, reduce cost and time, and how to triage the prioritisation of work packages and enable regional delivery through managed procurement channels to encourage innovation, support SME involvement and realise value for money and social value.

Our initial 'Hub' concept devised for the NZA Feasibility study considered the facilitation of dynamic data capture and monitoring, and sharing of analysis and benchmarking. Through the Department's broader Education Estates service portal initiative, further efficiencies across funding channels and capital programmes would be achieved encompassing Estates Management, and Build and Rebuild activities to truly consolidate the planning of the school estate nationally, regionally and at a school level, through their responsible body structures.

We will develop the strategy of how, through the Education Estates strategy framework, a long term and cost-effective operation will deliver school condition, risk and resilience, and decarbonisation implementation and maintenance prioritised to where is it needed the most and will have the greatest impact on sustaining the estate.

Our flow diagram below provides a starting point to build the model, and test the assumptions to provide a business case based on our experiences in defining the NZA Feasibility report and subsequent Pathfinder, through the Department's policy teams, and our consortium partner's direct experience and wider conversations and awareness of existing school estate initiatives and programmes. We will consider how a holistic regional triaged approach would deliver an end-to-end operation – from a funding mechanism to an efficient delivery and monitoring function.



Key features to be explored:

- Creation of an operation that re-enforces the DfE's commitment to condition, resilience and decarbonisation across the entire education estate. Integrating the Inspire, Plan, Act and Community energy themes to ensure inclusion and opportunity for all
- Long term and fully functioning operation defined by policy rather than purely a programme, providing advice and support on funding, procurement, delivery, and behaviour change
- End-to-end (individual case) management, ensuring data consistency and ongoing customer management, including access to ongoing support
- Creation of dynamic data dashboards to build a national benchmarking repository
- Aggregated reporting to the Department allowing visibility of where maximum ROI opportunities are enabling prioritisation
- Provision of a communications channel that supports and enhances the Department's strategy
- Operated as a sustainability solutions service for schools/colleges – building their knowledge and confidence through case managers and a dedicated expert team
- A fast-track forum for exchanging ideas and intelligence: Regional geographic aggregation; policy and updates; innovations and technologies; case studies and national data sharing, and; online events to share learnings, progress and insights
- Creation of a regional supply chain matrix of delivery specialists to ensure capacity
- Encourage open forum debate with regional supply specialists – bringing forward innovation and efficiency
- Develop specific procurement strategies and documentation to accelerate process, taking advantage of the flexibilities of the new Procurement Act
- Use special purpose framework solutions to accelerate procurement timescales to meet prioritised regional delivery schedules
- Social value at its core: Keep it local measure local wealth created; educate and support SMEs to access the work; ensure the SME gains, growth/development and report on it

SHARING DATA AND BENCHMARKING

One of the most important functions of the Regional Alliance Condition, Resilience and Decarbonisation service will be to collect and share detailed data on school condition and decarbonisation progress, and to build a regional and national dynamic benchmarking repository. The growing body of data, consistently collated, categorised and reported, will progressively inform the methodology in the most time and cost-effective way with manufacturing advancements, technical innovations and best practice self-perpetuate as optimal condition, resilience and decarbonisation blueprints.

As an example, Barker's XXX is a tried and tested school information, energy and decarbonisation portal which is uniquely placed to underpin the Education Estates strategy framework, with built in data security and robust processing and data search and management functionality that is easily able to integrate with other specialist technologies to facilitate customer relationship management and communications and smart metering monitoring and reporting. The EO portal would allow for immediate assimilation of schools' data, and present it back through dynamic dashboards; showing multiple dimension views for an array of different stakeholders with varying perspectives.

TEAM RESOURCES AND SCHEDULE

Our Regional Alliance feasibility team has the relevant experience required to develop models and build the business case, including financial investment modelling, data analysis, estate management, climate resilience, programme delivery, procurement and supply chain management.



We will meet with LocatED and Department colleagues at the outset of the contract to discuss the scope in more detail, and agree the schedule of progress meetings with colleagues and members of the policy development team, and engagement with DfE regional colleagues and key external stakeholders. We will share progress on model development and engagement feedback, considering any sensitivities and confidentiality. The draft business case will be presented in mid-May for scrutiny, ahead of a final report by 18th July 2025 (as per ITT).

BASKET 1 METHODOLOGY

We have outlined our methodology below, further explained in our responses to “Q2 – Engagement” and “Q3 – Programme.” These responses combine the solution and demonstrate how the Net Zero Accelerator will engage with schools and meet the ITT requirements. We have also developed a detailed resourcing plan that supports this methodology and our priced offer, which we can share as needed.

To further demonstrate how we will structure the team’s activity and deliver multiple workstreams in a coordinated way, we propose to adopt a similar operating model as the Pathfinder. This is outlined in the **Workstream Delivery Model** graphic below:

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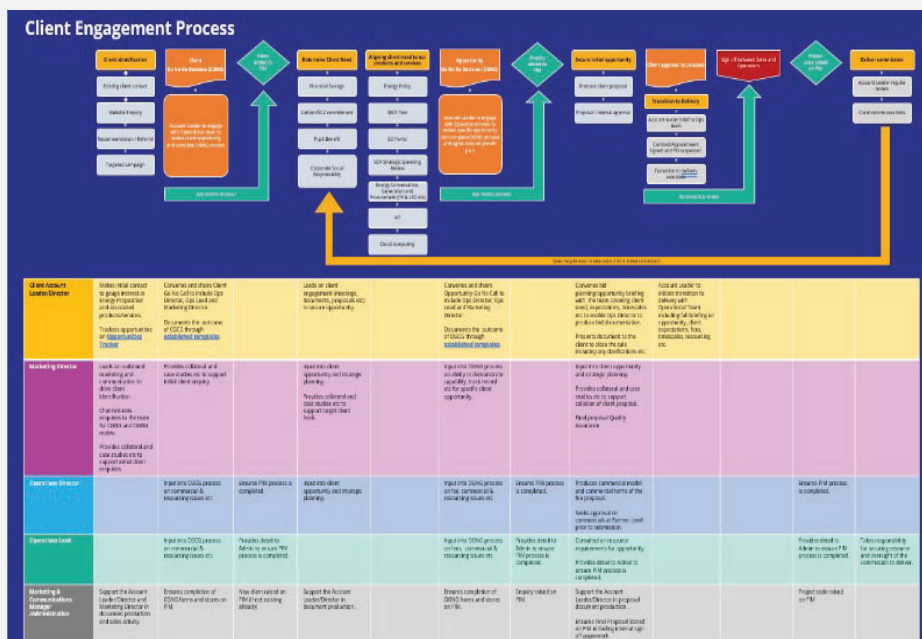
BASKET 1 ACTIVITY MANAGEMENT

Workstream		Activity	Involvement
1	Commission Mobilisation, & Comms Planning	The initial activity to establish the project on a solid foundation includes agreeing on the Project Execution Plan for the Net Zero Hub. This will also involve setting up reporting/comms protocols, governance structures, KPIs, a master program, and Stakeholder Mapping.	<ul style="list-style-type: none">• LocatED Senior Team• Barker Consortium Strategic Delivery Group• RB Senior Stakeholders
2	Existing Data Collection & Portal Set up	Collating, reviewing, and initially analysing existing data. Agreeing on scope and setting up the Barker EO Portals Suite for Energy Monitoring, Decarbonisation Roadmaps, and Condition Data.	<ul style="list-style-type: none">• LocatED Senior Team• Barker Consortium Strategic Delivery Group

3	Decarbonisation Plans	Site fieldwork, data gathering and subsequent data analysis and formulation of detailed decarbonisation plans for each site. This will also feature Scope 3 emission & resilience planning alongside decarbonisation planning.	<ul style="list-style-type: none"> • Caladen Low Carbon Consultants • Barker Energy Auditors • RB Stakeholders as facilitators. • Blue Marble
4	Additional Data Capture	Alongside creating the Decarbonisation Plan, this workstream will capture BIM models, BB103 comparisons, net capacity, and detailed condition surveys. Due to the time needed for these detailed data sets, they are scheduled separately to avoid delaying progress on the Decarbonisation Plans.	<ul style="list-style-type: none"> • Barker Condition Survey Team • School Property Matters Survey Team. • RB stakeholders
5	Energy Procurement	Working with the Trusts and DfE teams to appraise and recommend approaches to energy procurement.	<ul style="list-style-type: none"> • DfE & LocatED • Barker Energy Consultants • Ginger Energy
6	Data Portal Implementation	Once the data from Workstreams 2-5 are complete, this workstream will combine and present it in the XXX, enabling the next phases of behavioural change, technical interventions, and future planning and strategy development. The XXX will help inform and track progress across the four DfE sustainability pillars.	<ul style="list-style-type: none"> • Barker XXX Data Analysts • Consortium Data originators
7	Basket 1 - Technical Interventions	This workstream will follow on from those above and will include smart metering roll out to those site that need them. It will also include the scheduled roll out of BMS training and Controls Optimisation. Recommendations on additional interventions will be included e.g. ICT, water and waste.	<ul style="list-style-type: none"> • Barker Energy Consultants • Ginger Energy • Specialist contractors
8	Behavioural Change Programme	This longest running workstream will run concurrently with technical interventions and data capture workstreams. Beginning with the design and planning of engagement models, communications plans, and tailored training in June, engagement will be led by the Let's Go Zero team and Climate Ambassador visits until April 2026. Review Workshops, monitoring, check-ins, and ongoing data reviews will occur periodically from June to March 2026.	<ul style="list-style-type: none"> • Place Group - Programme management and comms • Let's Go Zero leading on Engagement • Blue Marble supporting on Engagement.
9	Future Planning and Strategy Development	This workstream will culminate all activities from the technical and behavioural change workstreams. It aims to finalise the Decarbonisation Roadmap, review and simulate options, and define the Decarbonisation Strategy with individual RBs.	<ul style="list-style-type: none"> • LocatED Senior Team • Barker Consortium Strategic Delivery Group • RB Senior Stakeholders
10	Lessons learned and feedback loop	On conclusion of the commission, we propose to conduct a deep-dive lessons learned session with all senior stakeholders. The outcome of this will support the refinement of the NZA model when national roll out is planned.	<ul style="list-style-type: none"> • LocatED Senior Team • Barker Consortium Strategic Delivery Group • RB Senior Stakeholders

BASKETS 2 & 3 METHODOLOGY

This service will be provided by Barker's existing Energy PMO Delivery team have delivered over 175 projects last year and over 550 projects in the past three years, using a tried and tested client engagement process.

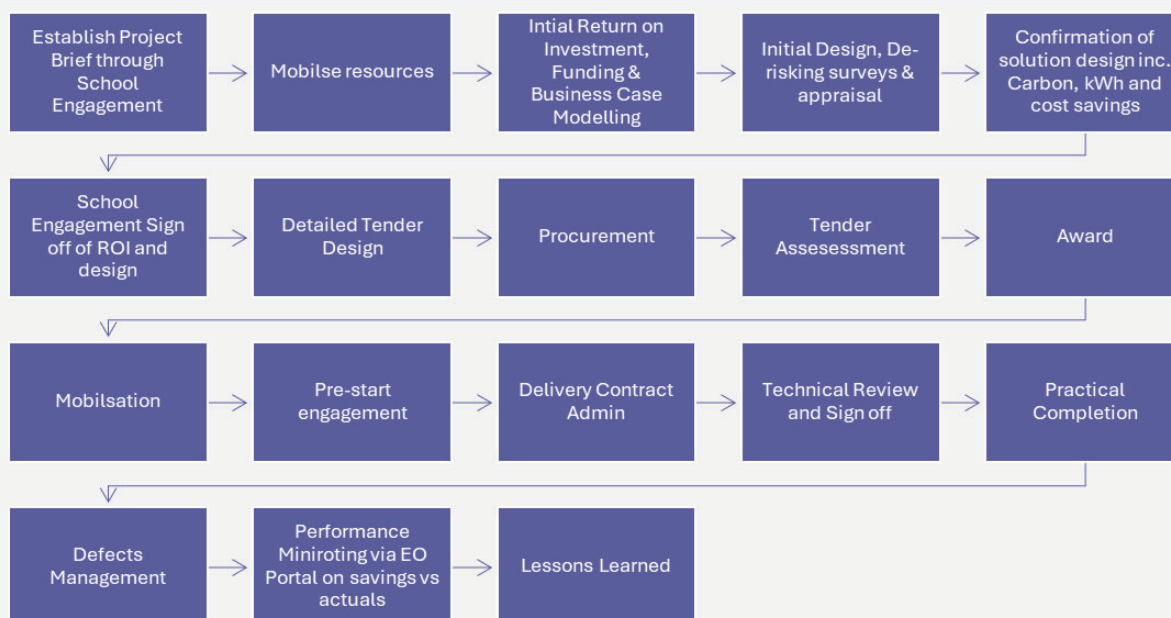


OUR BASKET 2 & 3 DELIVERY TEAM

To build our current work, we propose to maintain the operating structure and increase resources to deliver this element of the project as below:

OUR BASKET 2 & 3 DELIVERY PROCESS

The following sets out a typical methodology for delivering interventions that form Baskets 2 & 3. We will develop this further to align with the technology and project parameters that are determined by the Decarbonisation Plan.



CRITICAL SUCCESS FACTORS EMBEDDED INTO OUR METHODOLOGY

1. Empowering meaningful climate action through the *Climate Action Advisors*

Let's Go Zero will facilitate face-to-face and online support and guidance through its 32 regional Climate Action Advisors, whose mission is to help bring climate action skills and knowledge to every school & college. Through school/college visits, meetings and remote engagement, they will provide schools and their leaders with independent advice on carbon impact, action and funding, on how to accelerate their journeys to net zero, and how to develop their Climate Action Plans.

2. Our approach to data strategy

Data is at the heart of our solution. We propose to roll out Direct Data Collection for all meters, so energy usage data is available on a day +1 basis through our XXX dashboard. By monitoring this, we can track energy patterns and carbon savings. This will enable "proof of concept" checking of actual energy savings resulting from changes implemented.

3. Long term monitoring & evidence of real savings

XXX or NZAP Pathfinder Through the **Barker XXX** and XXXX it is possible to track real savings against targets and forecasts. This works using energy consumption data tracking. These tools allow schools and technical advisors, to track savings and compare to the NCZ target. This will be critical through the Pathfinder to measure and visualise the impact of interventions and behavioural change programmes.

DELIVERING ON OUR COMMITMENTS

Through our involvement to date on the Feasibility and Pathfinder, we are proud of the work we have done to date and the outcomes we have achieved working collaboratively with LocatED. Examples of the results we have provided and the outcomes we have delivered are summarised below:

- Pathfinder Lot 1 outcomes including (to date):
 - 272 Hours spent engaging with stakeholders on Behaviour Change and Climate Adaptation.
 - 6,709t of carbon saving relating to PV generation is equivalent to planting over 6,709 trees
 - 899,623 kWh of energy predicted to be saved annually following the completion of controls, housekeeping and energy management HDP recommendations
 - 322 HDP interventions recommended
 - PV projects saving 369MWh – enough energy to power at least THREE primary schools for a year
- High degree of client confidence (through our team being present and visible at key stages of inception/proposal development/delivery.
- Delivery of all elements to date in line with the Contract Requirements.
- 100% approval rate for PSDS and Workplace Charging Scheme bids submitted in the Pathfinder Stage
- 86% score for the Pathfinder Engagement Survey, with an upward trending result at the midway point.
- Supported 16 school staff and leaders in achieving Carbon Literacy Accreditation.
- Delivery of over 30 Basket 2 renewable and Greentech projects within a 4-month sprint period.
- We have been responsible for developing a suite of JCT Bespoke contracts for PV/EV/LED in collaboration with DfE and LocatED.
- Full adherence to the contract programme, delivering to a compressed and accelerated programme at the request of LocatED.
- Support in delivering quality improvements and scope development collaboratively with LocatED and schools to drive continuous improvement for the Pathfinder and beyond.

ADDED VALUE

We have carefully evaluated how we can deliver significant added value through the pathfinder commission. By assessing the ITT brief, we have identified areas where we can exceed expectations within the allocated budget. Pending this initial engagement, we can offer additional input in the following key areas.

- Existing linked with Unitary Authorities such as Great Manchester Combined Authority and the Church of England Education Board.
- Broader Sustainability focus including water, Green Infrastructure and climate risk assessments ensuring alignment across each of the four DfE sustainability pillars, namely:
 - Decarbonisation and Energy Efficiency
 - Climate Adaptation and Resilience
 - Biodiversity and Green Infrastructure
 - Climate Education and Green Skills - a high level of pupil engagement.
- Benchmarking data through our XXXX against over 8,500 schools.
- Blue Marble, Delivery partner to the DfE Sustainability Support for Education programme and Climate Ambassadors programme – ensuring alignment with DfE strategic aims.
- Grant Funding Applications completed free of charge.
- Use of "XXX" reporting to help inform and track progress across each of the four DfE sustainability pillars.
- Link with University of Reading Climate Ambassadors via Let's Go Zero and Blue Marble.
- Green Skills Development through our commitment to apprenticeships and SME growth.
- Tracking of social value and community wealth via SME growth.
- Independent review and Carbon reporting rigour.
- Our relationships with the Trusts involved in this pilot supports stronger understanding.
- Introduction of special advisors from University/Colleges and Finance Sectors.
- GenZero ICT strategy knowledge transference via Blue Marble.
- Ashden's key role in the national Energy Learning Network for community energy.

Q2 Engagement



Barker

Q2 Detailed stakeholder engagement strategy relevant to the specific Lot

Question 2: 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 (if required) the Basket 2 and Basket 3 services.

Word count: 2,000 words max, Weighting: 20%

OUR APPROACH TO STAKEHOLDER ENGAGEMENT

The success of the programme is, in many ways, dependent on how well we manage and maintain stakeholder engagement. As a consortium of alliance partners, we appreciate this and give great steer to building rapport, providing context, sharing knowledge and information, and taking schools and their stakeholders on a journey that they comprehend and believe in. We take this approach in all our work, ensuring all members of our team are briefed and can communicate with stakeholders at all levels with a consistent message. Along with communications, we share a common attitude in how we engage – always friendly, open, willing to help, inform and guide.



This approach proved successful in progressing the NZAP Lot 1 Pathfinder, sensitively managing hundreds of stakeholders each with different roles, understandings, commitments and responsibilities. This involved continual and consistent communications channelled through face to face and online meetings, newsletters and website news blogs. Progress was shared with schools through easy to understand 'At a Glance' fact sheets as well as more detailed data dashboards.

We will build upon this work to successfully engage with the 47 regional schools and college, building our understanding of their unique circumstances and challenges, helping shape their course and direction to net zero, creating shared ownership and buy-in agreement to Basket interventions, and expanding the channels by which we communicate, share and guide them and the communities they serve.

Our approach will continue to be interoperable with that of the DfE's Sustainability Leadership Hub, meaning that our school engagement methodology will completely align and integrate with the 'Inspire, Plan, Act' journey to net zero activities.

We will work collaboratively with the Climate Ambassadors Programme so that partner schools experience joined-up engagement, coordinated to deliver maximum impact and remove the potential for creating confusing multiple contact points and overlapping programmes. We will create efficiency with clear and concise integrated communications to minimise the precious time resources of school/college leaders, sustainability leads and staff. Engagement will take the form of a range of interactions to suit each school and college, with a kick-off meeting to determine what activities from the engagement 'menu' will have the most impact on their net zero ambition to drive behavioural change. At all times, our focus will be on causing the least possible disruption to learning, eliminating duplication of effort and providing practical training, insights and encouragement to deliver change effectively and efficiently.

ENGAGEMENT PROGRAMME

Our engagement plan will remain flexible throughout, to meet school and college stakeholder needs, and will build upon the programme we have successfully implemented for the NZAP Pathfinder contract:

Timeline	Activity
2025 April May	<p>NZAP Kick-Off, Programme Set Up and Initial Engagement:</p> <ul style="list-style-type: none"> ➤ Meet with LocatED and DfE colleagues to detail scope of engagement, align with comms protocols, map and agree all regional stakeholder groups and reporting regime aligned to the Project Execution Plan. ➤ Initiate and carry out school/college selection process, and map regional stakeholders aligned to agreed criteria, including community engagement and participation. Deliver shortlisted selection of 47 schools/college by end of May 2025. ➤ Initiate and develop models for the Regional Alliance business case, and map key stakeholders with consideration to potential sensitivities and confidentiality. Establish project protocols with DfE Education Estates strategy framework colleagues. Deliver feasibility report by end of May 2025. ➤ Produce detailed engagement and communications plan designed to reach stakeholders including Responsible Bodies (potentially Trusts, Local Authorities, Diocesan Authorities), schools, college, teaching staff, site staff, pupils, school governing bodies, statutory authorities (including utilities and planning authorities), regional sustainability and decarbonisation partners and interested parties such as local press with an insight to the programme aims and positive community energy stories. ➤ Set up dedicated CRM partition and contacts' central register. Create an appointment booking system so that a single point of contact will arrange all visits from consortium partners to ensure they are coordinated and matched to the responsible bodies, schools/college to maximise efficiency and minimise disruption. Consortium partner personnel profiles will help school/college stakeholders familiarise themselves with the team and help accelerate relationship building. ➤ Contact key personnel at partner responsible bodies, schools/college to discuss the engagement plan, access to site for surveys, metering and displays, and the behavioural change proposed schedule of activities. ➤ Understand where each responsible body, school/college are on their net zero journey, review their holistic 1, 2 and 3 scope baselines and their decarbonisation and sustainability strategies to create a starting point to build an intervention plan for Basket 1 and report on progress through the programme phase. ➤ Connect with the XXX network and coalition (see coalition partners below), and UKSSN representatives to coordinate information and communications. ➤ Production of a short video introducing the programme to school/college staff and students, outlining what to expect when we attend site and of the overall project.
2025 April May	<p>Engagement, Data Gathering and Behavioural Change Programme Build:</p> <ul style="list-style-type: none"> ➤ Produce a school/college visit schedule integrated with site surveys and data collection to minimise disruption and develop plans for Basket 1 interventions, including any minor repairs / light maintenance of existing controls. ➤ Produce communications materials and channels including templates and themes for newsletters, datasheets, social media (if appropriate), website, blog posts, posters etc., tailored to primary/secondary/post-16 audiences.

- Create a programme of training, teaching agendas and resources tailored to the context of each school/college with advisors, including waste, water, travel, food, adaption and procurement in their guidance to school/college leaders.
- Devise relevant online and face-to-face training workshops with school/college Leaders and Sustainability Leads, Governors, Finance and Business Managers, Students and Site Managers regarding operational and technical controls training, climate action plan development, carbon footprint measuring (scopes 1, 2 and 3), lesson planning utilising and tailoring SSE digital hub and Let's Go Zero resources.
- Workshops across relevant Responsible Body clusters for collective and peer supported learning, as well as school/college specific sessions to share examples of best practice and what can be achieved through schoolwide behavioural change.
- Ensure that every school/college is connected to Sustainability Support for Education and a Climate Ambassador for direct support, that they are actively participating in NENP.
- Build website for all programme stakeholders to access NZA progress (accessed via Responsible Body password protocols), engagement plans and feedback, survey results, datasets, sharing highlights, ideas and innovation news and links with the SSE.
- Organise installation of school reception monitors if required, although we propose using a web-enabled platform to distribute dynamic information captured from meters and utilities from our XXX data system to all stakeholders via laptops and smart phones, with dashboards of energy consumption, cost and carbon reductions set against each school's/college's baseline data and their climate action plan targets.
- Design 'XXX summary dashboard to highlight behavioural change and scope 3 interventions (especially waste, water and ICT) that are having most impact on accelerating net zero for teacher and student focus, so that further reductions can be made by cascading behavioural change throughout the school population.
- Develop social value plan and form working group.

2025
June
July
September

Engagements:

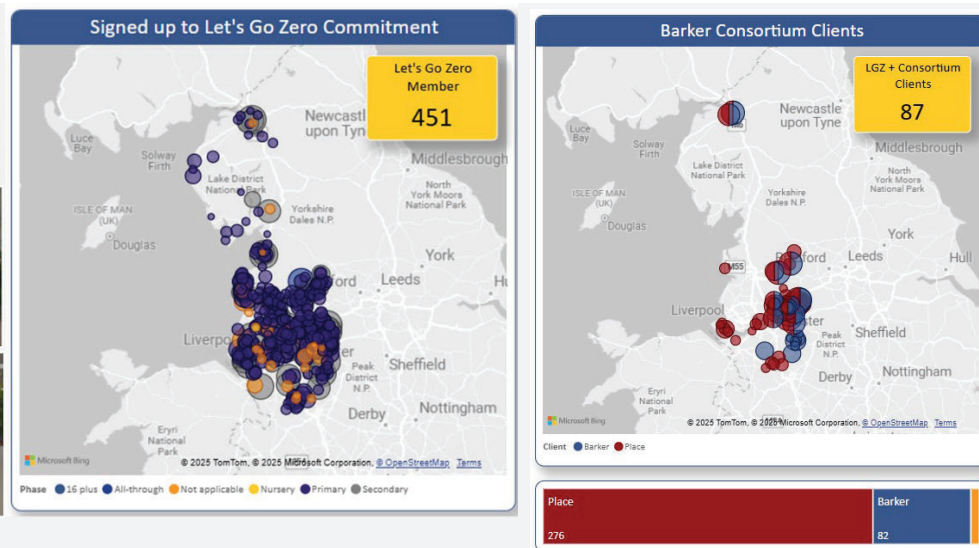
- Agree format and deliver intensive peer-to-peer support workshops at a responsible body, school/college level, at assemblies and community open days as appropriate (to be guided by the school/college stakeholders).
- Engage eco student groups on decarbonising the estate behavioural audits with tools such as surveys and thermal cameras.
- Support schools/college to complete their Count Your Carbon exercise, so this data can be used in the Trust Carbon Footprint and baseline calculations.
- Support schools/college to complete their first steps NENP mapping exercise, so that this data can be used to inform Climate Risk and Land Management planning.
- Provide Green Careers talks encompassing a broad range of skills and professions delivered by the Barker XXXX network and local supply chain providers.
- Update microsite and dynamic data dashboards on progress.
- Provide monthly progress reports.
- Facilitate all engagements – site surveys, workshops, Basket 1 (possibly some Basket 2) planning and interventions.

2024 September	Interim Engagement Report: <ul style="list-style-type: none"> ➤ Interim progress report including feedback reviews from the responsible bodies and schools/college about engagement activities, with observations and recommendations for enhancing and targeting of interventions to increase impact on energy, ICT, water, waste, cost and carbon reductions, I.E. changing behaviours which cause energy spikes during and outside of school hours, and making operational and contractual changes to third parties to impact scope 3 reductions. ➤ Update website and dynamic data dashboards on progress and provide datasheets for each school/college. ➤ Provide monthly progress reports and feedback from stakeholders.
2025 October	Follow Up Engagement: <ul style="list-style-type: none"> ➤ Follow up workshops to track intervention progress and outcomes and provide refresher and additional intensive training and awareness support. ➤ Update website and dynamic data dashboards on progress and provide datasheets for each school/college. ➤ Provide monthly progress reports.
2025 November	Final Report: <ul style="list-style-type: none"> ➤ Capture all engagement information and feedback from responsible body, school/college partners and wider stakeholders and collate into a final report, including completed decarbonisation plans, climate action plans, controls optimisation reports, scope 3 (ICT, waste and water) efficiency reports, site reports, BIM deliverables, energy contract reports, data and analysis and social value activities impact. ➤ Report to include progress made at each school, achievements, data outputs (incl. an independent Greenhouse Gas Inventory, baseline and data reporting strategy, produced by Blue Marble for each Trust), impact on attitudes and behaviours towards net zero and sustainability, and recommendations for engagement development for potential further Basket 2 and 3 interventions across the remaining contract period, and the model for scaling up for the national rollout.
2026 April	<ul style="list-style-type: none"> ➤ Behavioural change final engagements and completed Climate Action Plans.
2025 December to March 2027	Further Interventions: <ul style="list-style-type: none"> ➤ Maintain regular contact with responsible body, school/college partners in respect to planning and delivery of further Basket 2 and 3 interventions – using regional supply market routes to market. ➤ Provide monthly progress update communications via the website.

REGIONAL PERSPECTIVE

In our Net Zero Accelerator Feasibility Study Report we explored how a regional roll-out approach could offer advantages in terms of operational efficiencies, targeted capacity and supply market delivery. Building a regional network of schools and colleges through their responsible body structures, and connections with broader stakeholders similarly invested in climate change initiative and decarbonisation paths will be critical. We have existing contacts and customers in the region and a dedicated regional Climate Action Advisor team which will enable us to mobilise quickly. Below is the regional Let's Go Zero team and schools engaged with the campaign:





Across the North West, Let's Go Zero has direct contact with 16 council officers responsible for Net Zero programmes. We are in touch with 27 out of 36 councils and with the Greater Manchester Combined Authority (GMCA), including working to support its 'XXX' Solar Project. We meet monthly with colleagues from the North West Net Zero Hub, Climate Ambassadors & National Education Nature Park teams, and we are supporting sustainability in education through the Manchester Environmental Education Network. Climate Action Advisors are working with a number of dioceses delivering Climate Action Plan workshops for over 300 schools.

MANAGEMENT AND REPORTING

Our Engagement and Communications Team will manage the stakeholder engagement programme, coordinating all consortium member activities with the schools/college, their responsible bodies and wider stakeholder groups. The emerging outcomes of the engagements and interventions will be reported through Keep in Touch calls and monthly meetings with LocatED and DfE colleagues, under the headings of 'Inspire, Plan, Act' from the Sustainability Leadership Hub. Following Prince 2 project management principles, all workstreams will be risked-assessed, scheduled, tracked, quality reviewed and outcomes registered against target objectives as set out in the Project Execution Plan.

Let's Go Zero coalition partners:



Q3 Programme



Barker

Q3 Detailed and comprehensive delivery programme to meet the project timescales

Question 3: 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. The delivery programme should include the following elements:

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OUR PLANNED APPROACH

In line with our Methodology response we have provided in Question 1, we have defined the activity into **14 key interrelated workstreams** as below:

Workstream	Involvement	When
1. Redacted	<ul style="list-style-type: none"> • LocatED Senior Team • Barker Consortium Strategic Delivery Group (<i>Barker, Place, LGZ</i>) • RB/Trust/College Senior Stakeholders 	April '25
2. Redacted	<ul style="list-style-type: none"> • LocatED Senior Team • Full Barker Consortium Strategic Delivery Group 	April '25
3. Redacted	<ul style="list-style-type: none"> • LocatED Senior Team • Full Barker Consortium inc. Strategic Delivery Group 	June '25
4. Redacted	<ul style="list-style-type: none"> • LocatED Senior Team • Full Barker Consortium Strategic Delivery Group 	Throughout
5. Redacted	<ul style="list-style-type: none"> • LocatED & DfE Senior Team • Full Barker Consortium inc. Strategic Delivery Group 	April to 18 th July '25
6. Redacted	<ul style="list-style-type: none"> • XXXX Consultants • Barker Energy Auditors • Blue Marble Environmental Consultants • RB/Trust/College Stakeholders as facilitators 	June – Nov '25
7. Redacted	<ul style="list-style-type: none"> • BIM Consultant • RB/Trust/College stakeholders as facilitators 	June – Nov '25
8. Redacted	<ul style="list-style-type: none"> • DfE & LocatED • Barker Energy Consultants • Ginger Energy 	June-Aug '25
9. Redacted	<ul style="list-style-type: none"> • Barker XXX • Consortium Data originators (Barker, Caladen, BIM Ginger) 	June-Dec '25
10. Redacted	<ul style="list-style-type: none"> • Barker Energy Consultants • Ginger Energy – metering roll out • Caladen – Controls Optimization & BMS reviews (Specialist contractors as needed) 	June-Dec '25
11. Redacted	<ul style="list-style-type: none"> • Place leading on programme management/ • Blue Marble Environmental Consultants 	Jun '25 to May '26
12. Redacted	<ul style="list-style-type: none"> • Barker Consortium Strategic Delivery Group RB/Trust/College Senior Stakeholders 	Sep '25 – Apr '26
13. Redacted	<ul style="list-style-type: none"> • DfE & LocatED Senior Team • Barker Consortium Strategic Delivery Group • RB/Trust/College Senior Stakeholders 	March '25
14. Redacted	<ul style="list-style-type: none"> • Barker Technical Delivery Teams • RB/Trust/College Stakeholders as facilitators 	Delivered in 2 waves –

The above is underpinned by our detailed methodology set out in Question 1. We have set out a detailed Gantt chart programme overleaf to illustrate our planned approach in delivering this complex commission.

Q4 Quality Assurance



Barker

Q4 Provision of quality assurance throughout the delivery period

Question 4: 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 Baskets 2/3.

The response should include the following elements:

- Which long-term monitoring systems you will implement;
- How you will provide training to site staff to operate interventions; and
- How you will manage CDM and HSE requirements through the delivery of the interventions.

2,000 words, 15% Weighting

Throughout this programme, the Consortium propose to adopt a quality assured, school centred approach; not providing blanket solutions across the 47 schools & colleges but drilling down to determine each individual school/colleges circumstance and requirements and provide solutions accordingly. To this end, contractually, LocatED is our client, but we regard Responsible Body (RB), School and Colleges within the Lot to be as vital, and we need to ensure there are processes in place to keep each school /college as informed on progress and outcome as LocatED are.

To provide a consistent, high-quality service to each school/college the Consortium will hold regular progress and update meetings, as we have done during both the Feasibility and Pathfinder Stages. This will enable us to provide a light touch interface at school/college level, causing as little disturbance to the daily running as possible.

Additionally, these progress meetings will ensure that every member of the Consortium who attends site, has an overall understanding of the commission and can answer any questions, providing a quality and informed experience for all. This phase of the NZA programme will be overseen by Barker Project Director, XXX , who will work to ensure a common and strategic approach to the entire commission.

We have proven our ability to deliver **high quality outcomes** both for LocatED and for the RBs/schools/colleges during the Pathfinder stage. This is evidenced through testimonials and information outlined below:

- Delivery of all elements to date in line with the Contract Requirements
- High degree of client confidence (particularly Plymouth CAST) through our team being present and visible at key stages of inception/proposal development/delivery
- Full adherence to the contract programme, in fact delivering to a compressed and accelerated programme at the request of LocatED
- Support in delivering quality improvements and scope development collaboratively with LocatED and schools to drive continuous improvement for the Pathfinder and beyond
- 100% approval rate for PSDS and Workplace Charging Scheme bids submitted in the Pathfinder Stage
- A current 86% score for the Pathfinder Engagement Survey, with an upward trending result at the midway point
- Supported 16 school staff and leaders in achieving Carbon Literacy Accreditation
- Delivered over 30 renewable and Greentech projects within a 4-month sprint period
- We have been responsible for developing a suite of JCT Bespoke contracts for PV/EV/LED in collaboration with DfE and LocatED

Testimonials

"Plymouth CAST Multi-Academy Trust, has had the distinct pleasure of collaborating with the Barker Consortium during the first two stages of the Net Zero Accelerator Pilot Programme. From the outset, the team were exceptionally engaging, ensuring they thoroughly understood our estate and the unique challenges faced by the goals of the project. They invested significant time in discussions and at the end of the process provided valuable, clear information that has greatly assisted the project's development.

The Consortium bring a wealth of experience within the education sector, having worked with a diverse array of schools, and Trusts alike. This deep market knowledge is evident in their tailored service delivery, which is both supportive and efficiently designed to meet the specific needs of educational institutions like ours.

We are eager to continue our partnership with the Consortium on this national project and look forward to integrating this even more closely with the strategic support we already receive, in achieving our sustainability goals together. Based on our positive experience, I highly recommend Barker and their consortium members to other schools and Trusts seeking expert guidance and execution for their capital works."

XXX Trust Estates and Facilities Manager, Plymouth CAST

QUALITY ASSURANCE

Our Consortium cares about the success of every project we undertake and truly understands our clients' individual challenges and aspirations. With over 37 years' experience in the education sector, we have built individual reputations for delivering quality works, which, as per the NZAP Feasibility and Pathfinders, will come together to provide each NZAP Community Energy Programme school with a high-quality, industry best practised aligned service.

In line with the requirements and scope provided at tender stage, quality will be assured and monitored through the following:

The Decarbonisation Plan that each school/college would receive as part of the Basket 1 deliverables, follows a template that is in alignment with Salix guidance and best practice. This gives each school/college the confidence that their Decarbonisation Plan has been completed to the highest standard.

Any **Behavioural Change** recommendations will draw upon our extensive experience in the field of decarbonisation. These have been tried, tested and evaluated through lessons learnt exercises over a number of years and commissions.

Controls Optimisation works will be carried out by qualified and experienced Engineers who will begin the process with a review of the existing system. We would only ever use experienced M&E Engineers to deliver this, ensuring high quality outcomes.

Ginger Energy and Barker's in-house Data Analysis Team will work to obtain the **energy contract information** for each school/college, including sourcing energy bills for the last three years. By drawing upon Barker's multi-disciplinary resources, we are able to provide each school/college with a seamless service, ensuring that all aspects of the scope will be carried out to consistent standards.

Barker's **APMP-accredited team of Bid Writers** assist with grant funding applications. They have extensive knowledge of education funding streams including the CIF, LCSF & PSDS. With a remarkable track record of successful applications, we have secured millions of pounds for our clients. This has led to many of our industry Partnerships such as CST (Confederation of Schools Trust), hosting CPD and webinars on this subject which we would be happy to complete for this commission.

Basket 2 and 3 **Technical Advisory Services** will be provided by our multi-disciplinary experienced and qualified Consortium teams. Barker Quantity Surveyors and Project Managers will prepare a pre-tender estimate and then analyse any tenders received for the works and make recommendations for contractor selection. This process ensures that contractors who are experienced in the scope and have a strong track record of successful project delivery are appointed – maintaining high standards of quality throughout the contractor selection process.

All project data and correspondence will be managed and accessed by all relevant personnel internally using our chosen softwareXXX through which we are able to store all required documents and correspondence with yourselves and individual schools/college. This will enable efficient and effective access of all key information across the Project Team.

At Barker, we implement two levels of ongoing review to ensure project management and oversight of project work:

1. **Management Project Reviews** are undertaken for each of our projects on a monthly basis by a Partner or Associate. These reviews form the cornerstone of our quality management approach and cover key areas such as programme, budget, risk, design, quality and alignment to client outcomes. Each review is recorded and actions reviewed at the following session.
2. **Peer Reviews** are a daily function of our business, and involve checking the daily tasks and documents / drawings etc. These are completed by the individual's line manager, who will always be trained and experienced in the same discipline as the individual. This is a normal part of our team members' daily routine and ensures that constant quality assessment, lessons learnt and continual improvement is embedded into everything we do.

INDEPENDENT EXPERT REVIEW

An Expert Review will be conducted by dedicated and experience Carbon Accountants to quality assure predicted Greenhouse Gas reductions as a result of identified energy savings, including those targeted or forecasted. This will support the detailed financial analysis of these programmes.

Additionally, reviews will be carried out where required, to support any additional capital funding applications, to ensure the accuracy, completeness, relevance, consistency and transparency as required by the Green House Gas Protocol and other applicable standards.

CONSORTIUM QUALITY STANDARDS

Consortium members hold the following accreditations:

- | | |
|---|---|
| ✓ ISO9001: Quality Management | ✓ RICS Chartered Practice |
| ✓ ISO14001 Environmental Management System | ✓ RIBA Chartered Architect Status |
| ✓ ISO27001: Information Security | ✓ CIBSE Membership |
| ✓ OFGEM Ombudsman Services accredited | ✓ UN Climate Change Now Member, certified for carbon neutrality |
| ✓ Chartered Institute of Procurement & Supply | |

LESSONS LEARNT; CLOSING THE QUALITY ASSURANCE LOOP

We have already fed the initial lessons learned from the Pathfinder into our methodology to reflect the need to continually improve. For this phase we have set aside a dedicated period of time for Engagement Reviews with each school/college at interim stages and at the end of the programme. This will form a lessons learned register, enabling us to close out and address any issues prior to overall completion. We feel this would have a beneficial outcome on this larger, scaled-up phase and would further enable planning and solutions to be put in place at a national level.

DELIVERING PROJECTS SAFELY (CDM/HSE)

Safety is the priority for all projects. Barker currently have 27 members of technical staff who are suitably skilled and experienced to take on the role of Principal Designer under the CDM Regulations for refurbishment and retrofit projects, as well as a further 15 who are accredited to act as Principal Designer on more complex projects.

Barker are accredited under the CHAS organisation and have maintained accreditation since 2002. All Barker technical staff hold current DBS Enhanced checks. We also ensure that our sub-consultant supply chain hold the same checks where required.

Our integrated project safety management process includes rigorous checks, as follows:

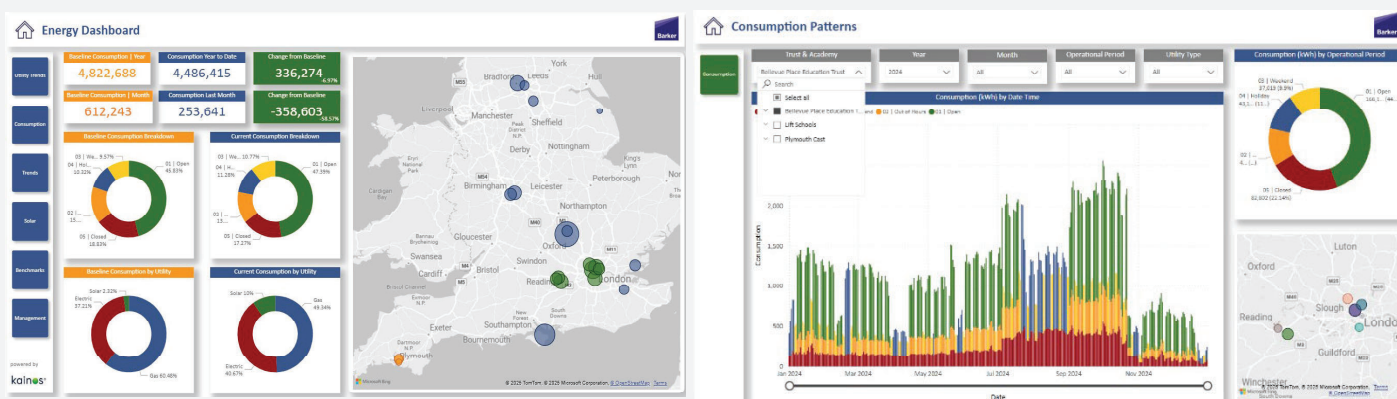
- Project initiation and design competency checks
- Due diligence and pre-qualification checks on contractors / supply chain
- Input to surveys and investigations
- Support of the CDM Principal Designer and Building Regs PD during design
- Pre-construction information collation
- HSE notification

- Contractor's construction phase plan review
- Site safety audits
- Completion and project close out
- Training and ongoing people development

LONG-TERM MONITORING

Our long-term monitoring systems will comprise of the following:

- a) Direct Data Collector/Meter Asset Manager Agreements for all meters, ensuring energy usage data is available on a "day + 1" basis through the XXX dashboard. By monitoring this, we can track energy patterns, drop-outs in data and carbon savings. This will enable "proof of concept" checking of actual energy savings resulting from works implementation.



NZAP Pathfinder Bespoke XXX for Energy & Carbon Monitoring

- b) Performance monitoring through internet enabled XXX devices e.g. PV generation sensors and XXX controls, Heat monitoring etc. This will enable a data-rich picture of the schools/colleges energy usage and performance to be monitored, interrogated, and tested to ensure optimal performance.

TRAINING SITE STAFF

Our training strategy would be undertaken in three workstreams:

1. **Site Staff Technical Training** – To support technical staff such as FMs and Site Managers in understanding energy management and carbon reduction techniques, examples include training around the effective management of automatic controls systems and BMS, and school heating decarbonisation strategies. At Basket 1 stage, we would invite Site Staff, teachers and other interested individuals to join Consortium members while they are on site and shadow their activities. All Consortium members are experienced in delivering training and would be happy to be accompanied during their visit, providing the opportunity for early-stage discussions about potential interventions and solutions.
2. **Behavioural Training** - Barker has access to training delivered by nationally recognised experts. This can range from general energy awareness and behavioural change programmes for teaching staff, delivered by Ashden through its Let's Go Zero nation campaign, which currently has 5,560 schools subscribed, through to focused technical training delivered by expert Energy Engineers through bespoke workshops.
3. **Data Management Training** - Training for the XXXX Data Portal would be given to relevant parties with self-training guides to navigate systems as well as one-to-one training to navigate dashboards, use reports to identify energy saving opportunities. This would be supplemented by Analysts who would be available for related questions. By training site staff on use of the XXX it will enable them to monitor, troubleshoot and measure the impact of the energy efficiency works. The data will be made available to the RB/school/college leaders to drive change and underpin investment planning.

Q5 Risk Management



Barker

Q5 Detailed risk management strategy to manage & mitigate risks

Question 5: Please provide a detailed risk management strategy for the successful delivery of the services

The risk management strategy should include the following elements:

Risk identification: detail the top ten project risks; and

Mitigation strategy: detail how risks will be identified, measured, tracked assessed & mitigated throughout project.

Word count: 1,500 words max, Weighting: 10%

RISK MANAGEMENT TEAM

Given the varied nature of the activity needed to successfully deliver this commission, we propose to establish a **Risk Management Team** **XXXX**

XXXX project risk management group and lead, guide and manage the whole consortium team.

For day-to-day management of risk, this will reside with Senior Programme Manager, **XXX** and Partner, **XXX**. Both have **proven to be highly capable at managing risk** as evidenced with the successful delivery of the Pathfinder project. Furthermore, our risk management process meets BSI-ISO9001 Quality Management standards.

This team will spearhead Risk Management using the wealth of knowledge we have all gained through the Pathfinder Stage to implement further improvement and improved risk management for this phase.

NZAP Risk Management Team

IMAGE REDACTED

IDENTIFICATION: THE TOP 10 RISKS

Based on our consortium's experience of delivering similar programmes, we assess the top 10 project risks associated with Basket 1 to be as follows:

Risk	Rank	RAG status	Risk and Mitigation
Programme			Risk: Careful sequencing around each school/college extracurricular and external commitments are required due to the programme timeline. Additionally, Basket 1's reliance on third parties for information could negatively affect progress, especially in data collection, which depends on timely and efficient information provision.
			Mitigation: The consortium will maintain consistent communication from the outset to minimise disruption across all activities which may affect the programming of the works. This will include dedicated survey and information coordinators who will be used to ensure a streamlined programme is completed.

Risk	Rank	RAG status	Risk and Mitigation
Safeguarding / Live Site			<p>Risk: Due to the nature of buildings being academic sites and the likelihood of sites being live even during the summer months with staff and pupils, it is crucial that adequate safeguarding measures are present.</p> <p>Mitigation: All team members hold an Enhanced DBS which will be brought to site with them as well as photo ID. Every member of the Consortium who attends any school site, or interacts with any stakeholder will adhere to all safeguarding requirements of each school.</p>
Access to Site / Staff Availability			<p>Risk: The Decarbonisation Plan required during Basket 1 is dependent upon access to site being granted to our team. The surveys will also likely require support from site staff to access areas required to gather data for the commission.</p> <p>Mitigation: To mitigate this and ensure a seamless process, we will assign a Client Comms Team. This team will be responsible for scheduling surveys, requesting information, and maintaining consistent communication regarding site access. This approach will ensure minimal disruption to students' learning and external activities, especially during school holidays.</p>
Level of Engagement / Behavioural Change			<p>Risk: Raising awareness and promoting behavioural change are crucial for the programme. Key stakeholders include SLTs, Estates Staff, Teachers, staff members, students, and the community. Without their engagement, the initiative may not achieve its potential impacts, especially during school holidays.</p> <p>Mitigation: To ensure effective programme engagement, the consortium will raise awareness and educate all stakeholders, led by Let's Go Zero and Place Group who already specialise in school engagement and change management. These efforts will build knowledge, empower individuals, save money, and enable informed decisions by Senior Leadership. School holiday planning will be managed by the Comms Team.</p>
Stakeholder Identification and Management			<p>Risk: Stakeholder identification and management will be crucial, particularly given the diverse perspectives across different stakeholder groups. Adopting a holistic approach with all stakeholders will be essential to achieving optimal carbon reduction results for each site within the portfolio.</p> <p>Mitigation: From the start, we will involve diverse stakeholders to ensure a comprehensive plan for each site. Their insights into school operations and energy use will help address the multifaceted aspects of decarbonisation. We will create a RACI plan and communications plan to map stakeholders and how we engage different audience types.</p>
Timing of Energy Audits and Thermal Modelling			<p>Risk: Based on the proposed programme timeline it is likely that Energy Audits and Thermal Modelling surveys will be completed during the summer months. This approach can be less preferable due to seasonal variability with different load patterns and heating systems being underutilised.</p> <p>Mitigation: To mitigate the associated risk, it will be appropriate to apply seasonal adjustments to extrapolate the building's performance. This can lead to additional complexity, and it will be crucial to explain to the client about potential inaccuracies to the modelling process.</p>

Risk	Rank	RAG status	Risk and Mitigation
Working with Existing School Infrastructure			<p>Risk: As part of the programme the consortium will be working with the existing school infrastructure and light maintenance to help support with identifying energy reduction methods across the estate.</p> <p>Mitigation: It will be vital that the proposed works are risk assessed looking at condition related issues across the estate to ensure work can be completed sufficiently and cost effectively.</p>
Financial Modelling			<p>Risk: Planning Basket 2 & 3 measures will require financial modelling to inform the business case. Risks to consider include future fluctuations in inflation, construction costs, and energy prices. If savings models rely on future forecasts, this could impact ROI modelling and the business case.</p> <p>Mitigation: We will collaborate with Barker and Place Group Cost & Procurement Management Teams on construction costs, Ginger Energy on energy prices, and central government metrics on inflation to explore and rigorously assess financial options.</p>
Metering			<p>Risk: Obtaining a Letter of Authority from clients in the respective Lot is crucial for accessing data. Delays in this authorisation will impede data analysis through the XXX I. Additionally, high demand for smart meters across sectors is affecting lead times for sourcing and installation.</p> <p>Mitigation: Allocating adequate time to obtain Letters of Authority from each site is crucial to avoid programme delays. Additionally, Barker will leverage their extensive supply chains in the education sector to ensure sufficient availability of smart meters for the identified sites.</p>
External Factors Affecting Energy Reduction			<p>Risk: As part of the Decarbonisation Interventions programme we will take action to reduce energy consumption. However, external factors such as school expansion projects, abnormal weather conditions, ongoing PSDS projects, and unplanned energy tariff changes could potentially impact these measures.</p> <p>Mitigation: To mitigate the risks of external factors affecting energy reduction across the school site, it will be imperative to identify key stakeholders and obtain key information. Having perfect knowledge will allow a site-specific appraisal of energy reduction measures and the likely outcome of external factors in the future.</p>

RISK MANAGEMENT AND MITIGATION STRATEGY

Our Consortium have an outstanding track record in the delivery of projects for public sector organisations with tight timescales and to stringent budgets. We are uniquely placed to understand key sector-specific risks and how they should be managed using the measures outlined below.

- **Establishing a Risk Management Team** (as above) with Risk Managers assigned to B1, B2 & B3 delivery.
- **Tracking Risk** – Through the Pathfinder we have developed Trackers/SharePoints for managing every element of risk with the LocatED team. It is 100% transparent, updated every week.
- **Development of Risk Registers** – These will be developed as early as possible in the commission and managed throughout as a live document.

- **Risk Workshops** - As a core part of our delivery methodology we undertake formal risk management on all commissions and, for larger schemes hold dedicated risk workshops.
- **Regular Communication** – We carry out regular communication to ensure all stakeholders are up to date and agreed safety measures are in place.
- **Change control & Budget monitoring** - Collaborating with the client to develop the brief, maintain stakeholder engagement and track change and budget carefully throughout the commission.
- **Carbon Monitoring and Measurement** - Ensures projected savings are correct with actual carbon savings from the commission and includes added rigour with an independent expert review carried out by Blue Marble.

At Barker, prior to every decarbonisation programme undertaken, strict guidelines are adhered to with Health and Safety Training. This is a crucial aspect of ensuring safety and efficiency in any survey or construction project. We have outlined the steps that are undertaken regarding the commission commencement.



POTENTIAL BASKET 2 AND 3 RISKS

Looking forward to baskets 2 and 3, we have outlined some potential risks regarding these phases of the NZAP programme:

- **Grant Funding Applications** – In line with the Specification, we will assist with the preparation of grant funding applications to Salix / the PSDS (Public Sector Decarbonisation Scheme) and the Workplace Charging Scheme. Note schemes such as this are Government-dependent.
- **Statutory Approvals** - Approvals such as DNO and Planning/Prior Approval are time-consuming and need to be addressed early in the programme to ensure low risk delivery.
- **Supplier Capacity & Skills** - With the potential to produce a large amount of capital work, the supply chain may become saturated. Working with our Partner, Place Group, explore the options for a purpose-built Net Carbon Zero Framework akin to currently successful Frameworks e.g. CCS, ESPO & YPO.

Q6 Social Value



Barker

Q6 Social Value

Theme 2: Tackling economic inequality. Policy outcome: Create new businesses, new jobs and new skills

Question 6: 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 elements:





- 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 NZA/CE project.

1,000 words, 10% Weighting

OUR SOCIAL VALUE COMMITMENT

As a long-standing consortium of alliance partners we are committed to achieving net zero by 2030, and actively support Ashden's Let's Go Zero schools campaign in providing pro bono advice and support as well as charitable donations. We are equally committed to creating meaningful social value for schools and their communities in ways in which align with our mission to meet the transition to the net zero, and a sustainable future for young people.

We have strong partnerships with a number of education sector bodies through which we gain and share valuable sector-related knowledge, which we will pass onto schools in the Net Zero Accelerator Community Energy project, including:

   	<p>XXXX</p> <p>XXXX This is an exclusive partnership, enabling us to pass on best practice and industry leading advice and guidance.</p> <p>Barker and Place Group are partners with the Institute of School Business Leadership (ISBL), who are uniquely dedicated to developing and supporting best practice across the school system.</p> <p>Barker is a strategic partner of The Trust Network (TTN), speaking at conferences and providing estate management CPD / training to members. In collaboration with both CST and TTN, we help develop tools, best practice and liaise with Government departments on matters relating to education estates.</p> <p>Barker is a Premium Partner with the Association of School and College Leaders (ASCL), who are the leading professional association and trade union for all school and college leaders.</p> <p>Let's Go Zero already work with key stakeholders (XXX) to support Green Skills and Careers through events, webinars and expert guidance. All NZAP programme schools with have access to these resources and support.</p>
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SUPPORTING SECTOR-RELATED SKILLS GROWTH AND SUSTAINABILITY IN THE CONTRACT WORKFORCE

We are passionate about developing and sharing best practice with schools on a broad spectrum of provisions, including Energy, Sustainability and Good Estates Management (GEMS). For our existing education sector clients, we hold regular meetings free of charge, which incorporate an element of knowledge sharing along with project / programme discussions. These would be offered to schools within the Net Zero Accelerator Community Energy project as a way of ensuring industry best practice and compliance.

We will provide additional training to estates managers beyond the project scope, on maintenance of intervention technologies, including how to best insulate buildings, using natural ventilation, cleaning and monitoring solar PV arrays, monitoring boilers and the heating infrastructure, maximising the impact of heat pumps, LED lighting management and building management.

We are equally passionate about creating employment opportunities for young people. Barker runs an Apprenticeship Scheme, enabling us to provide opportunities to those starting their careers in the industry. Barker's relationships with numerous universities and colleges aids us in this, as our internal recruitment team regularly attend careers talks and fairs to offer advice and placements for work experience and apprenticeships.

ENGAGING WITH PUPILS IN CAREERS TALKS, APPRENTICESHIPS, WORK EXPERIENCE

We will commit to a programme of work experience placements, internships and apprenticeships and careers talks, encouraging participation from the partner schools/college and their stakeholders. Throughout the engagement programme, including surveys, behavioural change workshops and delivery of Basket 1, 2 and 3 intervention projects, all consortium partners are willing to be shadowed whilst on site by staff, teachers and students, providing the opportunity for early-stage discussions about potential interventions and solutions.

Through our consultation with school/college stakeholders and their wider communities, we will be actively imparting industry knowledge on how to help tackle climate change. We will advise students how they can explore Green Skills and Careers as detailed in the Climate Action Plans aligned with DfE Strategy.

In addition to the student engagement as part of the programme scope, we will use the extensive knowledge and expertise across our consortium to deliver talks with students, tailored for primary, secondary and college audiences. For each participating school/college, we will provide a green skills and careers awareness guide and drop-in 'surgery' scheduled for when our experts are on site.

Subject to what works best for each school/college, this will accompany an assembly, workshop or classroom session where students, staff and others will be invited to hear the work that we do training young people to develop their sustainability-related careers across our organisations. These may be across such disciplines as project/programme management, energy efficiency and procurement, technology, surveying and engineering, communications, climate change and resilience, and biodiversity. We will also describe apprenticeship opportunities for older students through our organisations.

INTEGRATING WITH COMMUNITIES

We will commit to reaching out to each schools/college local community, sharing knowledge and encouraging engagement and participation in shared clean energy opportunities. This may include inviting local stakeholders to attend workshops to raise their awareness and understanding of how they too can help reduce energy consumption and even explore some of the themes described within the Regional Alliance Feasibility report.

We are committed to supporting wealth and health in local communities through a place-based approach, assisting the creation of jobs in cleantech industries. Place Group, for example, has supported skills bootcamps across the West Midlands for the Combined Authority, and aided the West Midlands Growth Company in securing funding for inward investment to train young people and reskill workers back into employment.

When procuring suppliers to deliver basket 2 and 3 interventions, we will use framework solutions that support increasing local suppliers/SMEs in securing publicly funded contracts. We will procure local and regional specialists who can demonstrate their commitment to net zero and supporting their workforce in energy transition.

SOCIAL VALUE MANAGEMENT

We will create and oversee a social value project plan designed specifically for the Net Zero Accelerator Community Energy project and collaborate with LocatED on all aspects of the delivery of training, teaching and development opportunities through a social value working group. We propose that the group meet quarterly to discuss ideas and check commitment progress. Our Programme & Relationship Manager will organise the social value activities, monitor progress and report on the impact and outcomes.

Thank You

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