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**Memorandum of Understanding**

**Services Provided by SDBE Appointed Diocesan Schools Surveyors**

Diocesan Schools Surveyors (DSS) to be appointed to each VA school by the Diocesan Board of Education (SDBE) after agreement by the Governors of that school.

**Services Provided to VA Schools by the Appointed DSS**

General (to be provided as part of the overall package):

1. Annual school visit to update LA Asset Management Plan – Condition of building fabric element. Report/update if necessary after this visit to Governors, LA and Diocesan Board of Education (SDBE)
2. Advice including outline/provisional costings for all capital projects. This advice to include assisting the Governors in the preparation of any forms required by the SDBE. This initial advice to include one visit to the school without charge, any further visits at the discretion of the DSS
3. Telephone advice on the appointment and management of consultants and contractors for maintenance projects
4. Attendance at SDBE DSS routine and planning meetings
5. Submission of project scrutiny forms to the SDBE

Capital Building Projects are provided at a fee to be agreed between the DSS, Governors and/or SDBE. This fee will ordinarily be 12.5% of net building cost and includes all other professional consultants’ fees and:

1. Preparation and presentation of plans. Final plans are to be agreed by the Governors in writing
2. Preparation and submission of all necessary SDBE and EFA forms with attachments, statutory applications and plans
3. Advice to the Governors/SDBE on the requirement and appointment of any other professional consultants required
4. Management of formal tendering processes as necessary to ensure best value
5. Advice and preparation of all contracts with contractors
6. Management of complete project until the end of any retention period. Project Management to include:
7. Formal project meetings to include a pre-contract and where the contract period is five weeks or longer, site meetings at least once each calendar month throughout the project
8. Minutes of all formal project meetings
9. All changes/amendments/variations to the contract to be instructed by way of written instructions
10. Monthly financial updates for the governors and SDBE if the contract costs have increased
11. Within three months of practical completion to the SDBE and the Governors in writing a financial summary to include all contract costs to practical completion, details of retentions and any anticipated additional costs

**Definitions:**

Capital projects: All building works, inspections, planning, surveys with a net value of £2,000 or more

Maintenance: All works, inspections, planning, surveys with a net cost of £1,999 or less

Net value or cost: The cost of works, inspections, planning or surveys excluding any fees or VAT.

Note: Feasibility Studies. In exceptional circumstances when DFC or specific EFA grant is being used for feasibility studies and/or project development, all fees but not VAT are included in net costs.