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ABSTRACT

This guidebook helps schools identify their maintenance requirements, choose the best organizational model of maintenance to ensure they receive a good quality service for their money, and help teachers and administrators achieve whole school awareness and commitment to school maintenance management. Sections address evaluating a school's maintenance situation, understanding what the different types of grounds maintenance organizations do, choosing the most appropriate kind of maintenance agreement, and deciding who to work with. Also included are several case studies. Appendices provide a maintenance calendar, a glossary of terms, a list of professional organizations and other useful resources, and a guide to contract letting and monitoring. (GR)

A Guide to the MANAGEMENT & MAINTENANCE of school grounds

ENGLISH NATURE

Learning through LANDSCAPES

Joan Wood and Michael Littlewood

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Learning through Landscapes

Learning through Landscapes (LTL) promotes improvements to the environmental quality and educational use of school grounds by coordinating a programme of activities designed to encourage their sustainable use and development.

School grounds are vitally important outdoor spaces in what is perceived to be an increasingly dangerous society. For most children they are the first public outdoor environment of which they have any sustained experience. Attitudes towards people and places are formed by this experience.

LTL is the only national organisation which deals with all aspects of school grounds development and, in this respect, is unique in the world.

From its many research projects, LTL knows that changes will only be sustainable if they are managed at a local level. LTL's job, therefore, is to help individual schools help themselves most effectively. Research conducted by LTL suggests that the following benefits can be gained from developing school grounds:

- improved environmental quality and enhanced image and popularity of the school
- increased resources to support the delivery of all aspects of the formal curriculum
- improved relationships between staff and pupils
- improved quality of the informal curriculum
- improvement in the behaviour and attitudes of pupils
- reduction in accidents, vandalism and truancy
- development of an ethos of care, a sense of ownership, pride and responsibility towards the site
- more efficient and effective use of existing resources
- access to additional funds, resources and support
- a great deal of fun for all those involved!

To achieve the maximum possible benefit from school grounds development LTL's research has suggested the following three principles are essential:

1 School grounds development needs to be sustainable.

2 The process of change must be holistic:

- including the whole site - not just the playground,
- including the whole school community - pupils, teachers; non-teaching staff, parents, governors, the wider community,
- including the whole curriculum;

  the formal - that which is taught,

  the informal - that which is learned during play and break-time,

  the hidden - the messages and meanings conveyed by the grounds;
- including consideration of the use, design, management and maintenance of the grounds.

3 The process must be participative, involving young people actively, with adults, in all stages of the process.

English Nature

English Nature is the statutory advisor to the Government on nature conservation in England and promotes the conservation of England's wildlife and natural features. It shares its knowledge, understanding and practical experiences to inspire and enable people to sustain and enrich England's natural heritage for all to enjoy.

English Nature is responsible for managing over 160 National Nature Reserves, the jewels of our wildlife heritage crown. Every year it welcomes hundreds of organised parties of school children and students to National Nature Reserves. Many are ideal for learning about conservation management, gaining an insight into the evolution of our countryside and seeing a good range of animals and plants in their natural habitat.

Another aspect of English Nature's work is notifying Sites of Special Scientific Interest. These are areas that have been identified as outstanding or unusual in terms of the wildlife or geology they feature. However we are equally concerned about the more common plants and animals, many of which are far less widespread or abundant than they were 30 or even 10 years ago.

English Nature also gives grants to help carry out nature conservation. One of its more successful grant schemes is the School Grant Scheme (now in its tenth year), through which it supports the development of school grounds for wildlife and as a learning resource. This scheme has enabled children to explore and value their natural environment.

It is through grant schemes and partnership projects with other organisations that English Nature has provided training and support for teachers wanting to know more about developing and using school wildlife areas. By helping schools and their wider community to maintain, manage and use school grounds, English Nature believes that it is creating opportunities for developing the skills that enable pupils to make more sustainable and satisfying use of the environment in their everyday lives. Young people can develop a respect and care for the school grounds so that they can be enjoyed by future generations of people and wildlife.

1

INTRODUCING GROUNDS MAINTENANCE

Key questions

- Why is school grounds maintenance important?
- Do you know about contracts and Compulsory Competitive Tendering?
- Is your school exempt from the regulations within the Local Government Act 1988?

INTRODUCING GROUNDS MAINTENANCE

Purpose of this guide

The purpose of this guide is to enable schools to understand the extent and the importance of grounds maintenance, and;

- provide information that will enable schools to identify their maintenance requirements;
- help schools choose the best organisational model for this aspect of their school management to ensure they receive a good quality service which represents best value for money;
- help headteachers, teachers and governors to achieve whole school awareness and commitment to this aspect of school management.

This guide has been designed so that schools can easily gather together all the information they require in order to make informed decisions about the management and maintenance of their school site. It is intended that some of the sheets and checklists will be photocopied and used for information gathering and presentations to a governors or staff meeting. Some of the information sheets may be used directly with young people.

The information contained in this book was believed to be accurate at the time of printing. Changes in national and local government laws and regulations, coupled with the unique features presented by each school site, mean that it is important schools seek appropriate expert technical or legal advice when dealing with this subject.

Introduction

Do your school grounds

- present a picture of healthy plant growth?
- provide a safe and attractive environment which will stimulate formal and informal learning?
- promote positive messages about sustainable living?
- provide ways for young people to understand and care for their environment?
- act as a positive focus for community activity?
- provide your Governors with a good quality service at a reasonable price?

If your school's grounds are appropriately managed then you will be able to answer "yes" to all these questions.

School grounds management encompasses all aspects of the grounds - how they are designed and what they contain, how they are used and how they are maintained. It also includes decisions about how much they cost and how this is paid for. For most schools, the management of their grounds will be an important strand in their School Development Plan. Much of the information included in this guide will, therefore, be particularly relevant to the setting and measuring of broader educational objectives.

As a result of the introduction of Local Financial Management of schools (LMS), the introduction of national curricula (in England and Wales, Scotland and Northern Ireland), the introduction of Compulsory Competitive Tendering (CCT) for services such as grounds maintenance and an increased awareness of the importance of environmental education, many schools have looked afresh at their grounds. In particular they have reconsidered what opportunities they want their school site to offer to both the school and its wider community. At the same time, research by organisations, such as Learning through Landscapes, has revealed the important role these environments play in the development of young people's attitudes and behaviour. Where young people are involved in the planning, creation and after care of their grounds, a range of benefits are enjoyed.

The needs which can be met by school grounds vary enormously. These range from areas designed to provide sheltered seating to complex combinations of built and natural landscapes designed to stretch young bodies and minds. School grounds can also provide an area in which the need to foster care and understanding for the environment can be explored. With increasing awareness of the need to conserve resources such as energy and water, there is considerable potential for the school grounds to demonstrate the concept of "sustainability". If we are really serious about conserving natural resources we can turn to alternative technology to achieve energy saving in school buildings, through the installation of solar, wind or hydro systems. Where there is sufficient local land, trees can be used for biomass (fuel). And, of course, there are important lessons of biodiversity (the variety of life on earth) to be learned through the use and development of wilder areas.

Similarly, if we really care about the messages we give about equality of access, school grounds should be seen to reflect the needs of all groups including disabled users, girls and boys and pupils from different cultures.

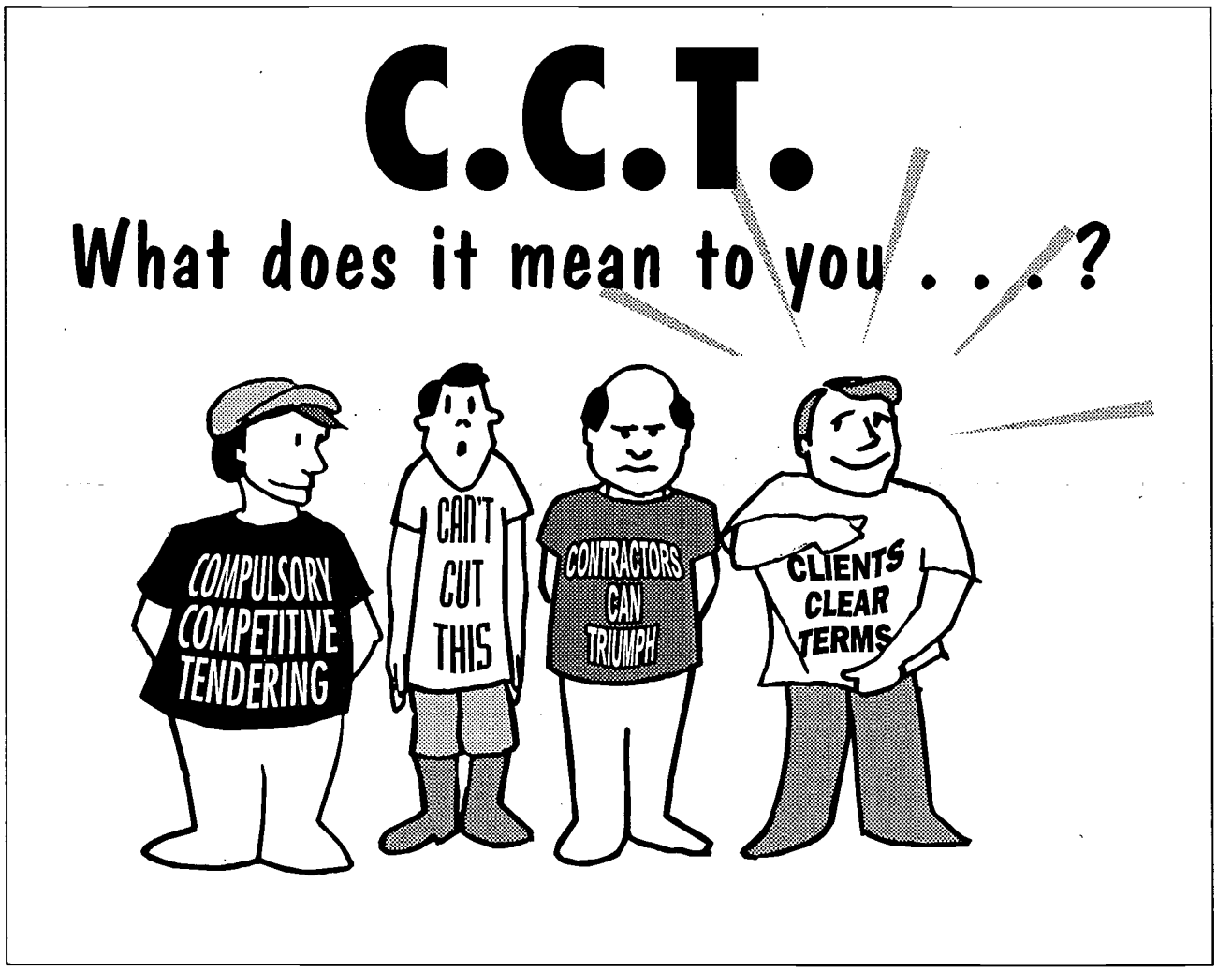
School grounds development, like school grounds management, however, is not restricted to the physical dimension. Making changes to teaching and learning styles, playground rules, breaktime supervision and establishing acceptable behaviour codes with the full involvement of pupils may have far-reaching effects. Whatever form school grounds development takes, there are implications for grounds maintenance. In order to ensure the long term success of school grounds development projects, these implications need to be considered before any changes are made.

In addition, there may be reasons for reviewing your school grounds maintenance other than the fact that you are developing your grounds. Schools are looking more closely at their budgets and

may want to identify areas where costs can be reduced, where better value for money can be obtained or greater financial efficiency achieved. Schools continue to strive to provide a high quality environment in which learning can take place most effectively and which will appeal to parents of potential pupils. It may be that your school is approaching the end of its current grounds maintenance contract and may want to see what else is available.

If maintenance is just the responsibility of the headteacher or one member of staff, it is unlikely that it will be totally effective. Shared responsibility will spread the workload and secure a sense of ownership. There is plenty of evidence to show that this arises out of involvement in the planning, creating and maintaining of any school grounds development.

This guide will help all sections of your school community to be involved.



Some common questions and issues

At LTL we are commonly asked the following questions. The answers should help you to deal with many of your general concerns before turning to the rest of this guide for more detailed information.

What is grounds maintenance?

School grounds maintenance is the day to day care of all aspects of the school grounds to an agreed standard and in an agreed way. This work, and its organisation are only a part of the larger task of school grounds management.

What is grounds management?

Management is concerned with the longer term planning and policies and organisation of site use, development and maintenance.

The grass has always been cut perfectly well in the past, why do I have to be involved now?

The Local Government Act of 1988 requires that contracts for grounds maintenance work have to be put out to tender, at regular intervals, except for Voluntary Aided schools (where the staff are employees of the governors rather than the LEA), small schools (with three or fewer full-time equivalent staff undertaking grounds maintenance and cleaning work combined), Independent schools and for Grant Maintained schools. This means that someone at your school will have to be involved in taking decisions about grounds maintenance.

Why was this legislation introduced?

To ensure that local authority staff should only be allowed to undertake grounds maintenance provided that their costs for doing so were competitive with commercial contractors and so to ensure that schools get value for money.

How does the Local Government Act (1988) define grounds maintenance?

It is defined as:

1 "the cutting and tending of grass (including returfing and reseeding but no initial turfing)

2 the planting and tending of trees, hedges, shrubs, flowers and other plants (but excluding new landscaping works)

3 the control of weeds."

How did local authorities interpret this when they introduced new contracts?

For a variety of reasons both financial and managerial, most local authorities decided to include broadly the same areas of work in grounds maintenance contracts as had been previously carried out by their own Direct Services Organisation (DSO), also sometimes called Direct Labour Organisation (DLO) .

For schools and the majority of local authority grounds staff, this has resulted in fundamental changes in their relationship with schools. The most important aspect of this has been that the work is now precisely specified, costed and authorised, usually before it is started.

I have been told that my school is CCT exempt - what does that mean?

Schools may be exempted from CCT compliance if:

they are Grant Maintained or Independent;

they are Voluntary Aided and staff are the employees of the Governors;

their cleaning and grounds maintenance services combined amount to the equivalent of 3 full-time staff or less (many Primary schools fall into this category).

CCT exemption affects the variety of types of grounds maintenance agreement that can be entered into. Unlike non-exempt schools, these schools are able to consider employing their own grounds staff or letting contracts without having to follow the CCT letting procedure. They may also be able to enter into service level agreements with DSOs.

There are problems with water lying on some of our sports pitches and there are gaps appearing in our shrub beds.

It is important for schools to realise that, unlike the during the pre-CCT situation, most local authorities have chosen to differentiate between essential work (e.g. grass cutting, shrub pruning, sports marking) and non-essential, or provisional, but desirable work (e.g. renovation and repair work on sports pitches, shrub replacement, provision of markings for special events such as Sport Days etc.). Headteachers need to be aware, therefore, that some tasks which had previously been carried out automatically may now require a specific instruction before they will be done. They will also need to ensure that financial resources are available for this type of work.

How are schools apportioned money for their grounds maintenance?

In addition to the Local Government Act 1988, the Education Reform Act 1988 has resulted in a change in the financial arrangements for grounds maintenance. Each school now has a specific budget, produced by a formula, allocated for grounds maintenance.

Why is £5000 allocated in our budget for grounds maintenance?

Budgets for school grounds maintenance are allocated according to formulae which can vary between Local Education Authorities. Most are based upon pupil numbers, with additional funds reflecting the actual costs of maintenance prior to the introduction of CCT or the costs of maintaining the features present on site. Differences in budget allocation may also exist for Voluntary aided and Church schools. Grounds maintenance in independent schools remains the responsibility of the school.

How are budgets allocated for Grant Maintained Schools?

For most Grant Maintained schools, the budget allocation for grounds maintenance is part of the Annual Maintenance Grant. This is calculated and identified using the same formulae and headings as used previously by their local authority. For Grant Maintained schools funded under the Common Funding Formula, a budget for grounds maintenance will have been included but may not be specifically identified.

We want to reduce our costs, can we reduce our maintenance?

Schools have been able to improve the quality of their grounds maintenance for no extra cost or even reduce costs simply by being more aware of how their maintenance is organised and improving the efficiency of this. However, simply stopping certain maintenance or reducing the level of supervision can result in long term problems on site which may become a health and safety hazard and may cost more to repair than to continue maintaining.

Our auditors are concerned that we may be paying for work that has not been done to a satisfactory standard. Where do we start?

By looking at the agreements that are already in place for grounds maintenance you will be able to identify who is responsible for:

- setting the standard that has been agreed;
- monitoring the work to ensure those standards are met;
- authorising payment for work done.

By comparing your model to the others described in this guide you will be able to identify any shortcomings and suggest ways of making improvements.

The grass cutters have just mown over our mini-beast experiments again.

Schools are being encouraged and supported to increase the use they make of their site for teaching. School grounds have become the focus for lessons in every subject area and therefore there may be an increased need for teachers to be aware of school grounds maintenance procedures in order to ensure their needs are catered for. Any grounds maintenance agreement should have a mechanism whereby information about the need for changes in maintenance requirements can be conveyed between the school and the group responsible for doing the work on site. For example, it may be desirable to stop mowing an area of grass because of experimental work or because of excessively wet conditions.

We used to have a pond but now it is all overgrown.

Many schools have made significant changes to their sites and intended that pupils and parents will maintain the new feature only to find that time and curriculum demands, as well as the changing pupil and therefore parent population, mean that maintenance is allowed to fall behind. Suddenly, what was intended as an asset and a resource has become an eyesore and even a hazard for health or safety. Maintenance, therefore, needs to be considered at the very beginning, and organised and budgeted for accordingly.

We want to develop wildlife habitats on site and maintain them as part of our conservation group's activities. What do we need to do about the grounds maintenance contract?

The current moves towards greater pupil and school community involvement in the development of school grounds are to be welcomed as it allows the users to be involved directly in decisions which will affect them. However, schools need to be aware that all plans for change and development will affect routine grounds maintenance and so will require to be integrated into the maintenance programme. Indeed, this may involve a formal notification and negotiation procedure if grounds maintenance is currently being managed under contract.

Even after the grounds staff have been on site, there are areas which look untidy. Is this poor maintenance?

Not all landscape problems arise from a low standard of work. Some are a result of poor initial design. For example, grass areas next to footpaths may always look untidy and threadbare. One solution may be to programme regular reseeding or turfing. However, by reviewing the way the path is used and the numbers of pupils using it, a better solution in the long term may be to widen the path to an appropriate size and shape and add a definite edge such as kerbing or planting. Too often there has been a tendency to simply plant a spiky bush or a litter bin on the worn away corners of footpaths, forcing the pupils to walk around the back of the obstacle or forcing them over onto the other side of the path. Another result may be a lot of pushing and squabbling as groups negotiate their way along the path. In turn the spiky bush itself becomes a maintenance problem, requiring cutting back to avoid scratching pupils!

Some new planting and some wilder areas will, inevitably and intentionally look unkempt. It may be helpful to signpost this clearly so that everyone is aware of what you are trying to do. Careful design which takes account of the current numbers and types of site users and site use may, in the short term, seem expensive but in the long term will bring the benefits of easier and therefore cheaper maintenance, reduced repair bills associated with the provision of a good quality environment.

SUMMARY

School grounds vary in both size and type. Some schools have only small tarmac yards for four hundred children, while others have several acres of grass as well as tarmac areas for the same number. This occurs irrespective of location, with many rural schools still having all tarmac grounds. In the last few years there has been a large increase in the diversity of school grounds with wildlife habitats such as ponds, woodlands, trees and meadows being created as well as seating and quiet recreation areas and specific curriculum resource areas.

In addition to the extraordinary growth of interest in school grounds, there have been changes in all aspects of the management of schools. Traditionally the local education authority was responsible for the overall management and maintenance of the school grounds. Today many schools have opted to take responsibility for organising their own site development and maintenance.

Although there is now widespread agreement that school grounds can be a valuable asset, grounds maintenance practices have not always been completely in harmony with the educational requirements of the curriculum. Schools, in seeking to determine objectives and strategies, need to recognise and reconcile the value of the grounds in terms of their educational purpose and their responsibility to protect the school environment within a restricted budget.

2

MAINTENANCE

Key questions

- Do you know what needs maintenance in your grounds?
- Do you know what maintenance is required?
- What are the issues affecting grounds maintenance?
- What are the regulations relating to your site?
- Are you satisfied with the current standard of maintenance?

Introduction

Traditionally, the term grounds maintenance, for schools, has meant the complete care of their sports and playing fields, lawns and garden areas throughout the seasons. In addition, the marking out of sports facilities such as tennis and netball on tarmac areas and the removal of mosses, weeds and leaves from footpaths and playgrounds have been carried out by "the groundsmen" or "the gang", sometimes in collaboration with the caretaker. As a result of LMS schools are now having to play a greater role in whole site maintenance. As a result of the widespread interest in school grounds development, for many schools the complexity of that maintenance has increased with schools now having to consider everything from the gate hinges to the school pond.

The extent of grounds maintenance required on your site will depend on a number of factors including:

- which features are present on the site;
- the climate that prevails upon the site;
- the use that is made of the site;
- all the legal issues relating to the site, such as overhead and underground services, rights of way, ownership, national and local environmental regulations.

In order to clarify what might be the best model for a school, this chapter will help you to:

- identify site features which require maintenance;
- identify the maintenance they will require;
- understand the effects that site use, climatic, site and soil conditions, regulations and legal implications may have on maintenance and identify which apply to your site;
- identify whether or not you are happy with the current quality of maintenance.

Which site features require maintenance?

The presence of certain features will dictate to a large extent the nature of maintenance required. For example, if you have an all-tarmac site your current grounds maintenance requirements may be limited to weed, moss or algae control upon the surface, repainting of any markings (such as games, sports or traffic control) and care and repair of the tarmac itself. In addition to this, preventative treatment, such as regular clearance of drainage channels and gullies to avoid blockage by leaves or soil, regular checks on gutters and overflow pipes and the early repair of cracks in hard surfaced areas will delay the need for major repairs or complete renovation.

However, most schools have grass or all-weather sports pitch areas, garden or shrub borders and outdoor equipment such as play equipment, seats, shelters and fences. Increasingly, schools have areas of naturalised planting or habitat creation, in addition to a variety of hard surfaced areas. As with the all-tarmac site described above, attention to detail in terms of maintenance of these features will ensure that they continue to provide a high-quality outdoor environment which is able to support a wide range of curricular and social needs.

Knowing which features you have got is the first step when considering grounds maintenance. Whether you have an all tarmac site or an oasis of diversity, and whether you are planning to make changes or simply leave things as they are, completing a site survey is an essential and enjoyable first step. Although it may seem a large task, it is helpful to remember that the initial survey need only be done once.

It is an obvious fact that in terms of time, cost and machinery, cutting 1 square metre of grass is substantially different to cutting 1 acre and therefore it is helpful to record the amount of each feature present. As with the initial survey of features present, measuring the amount of each feature need only be done once provided there is a mechanism whereby site records are easily dated if changes are made to the site. Much of this information may already exist in local thority records or in documents associated with current maintenance practice although it is eful to check such details to ensure they still accurately reflect the current site content.

Diagram 1 includes most of the common school grounds features requiring maintenance of some type. A blank version to help you record which features you have on your site is provided at the end of this chapter (see Checklist 1).

For a more detailed survey there is already pupil-based material, linked to the National Curriculum, available, for example, LTL's Esso Schoolwatch. This pack will enable you to identify the features which make up your school grounds.

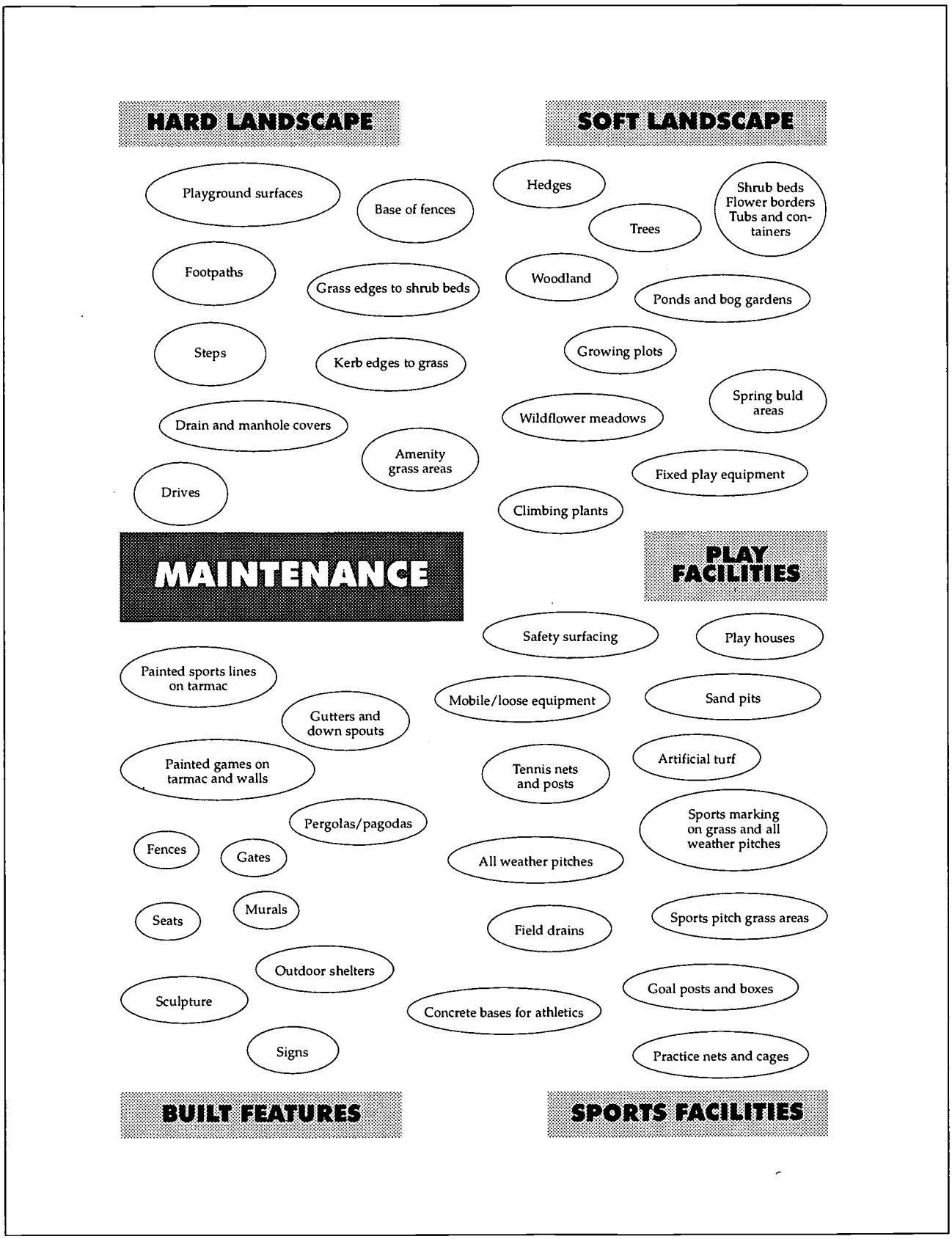


Diagram 1

What kind of maintenance is required?

Features such as those mentioned in Diagram 1 will all require regular maintenance, sometimes specialist in terms of skills or machinery. Some features will require active maintenance for part or all of the year. For other features, maintenance may simply consist of regular inspections in order to ensure the school site is safe for use. The frequency of such checks may be determined by existing Health and Safety guidelines but they may also be affected by the safety and security needs of each particular site.

Although the establishment of a system of daily/weekly/termly/annual or biannual checks may sound onerous, in reality it will lead to a reassurance that you are providing a safe and good quality environment for young people. It can also lead to cost efficiency as problems are identified at an early stage, or even anticipated, and therefore the school is less likely to be faced unexpectedly with a large repair bill or, in the worse case, a court case for injury to a child or adult.

The following examples are intended to demonstrate the variety of types and frequencies of maintenance which exist. A more detailed calendar is included in Appendix 1 and further specialist references are included in Useful Resources. Variations in site conditions, use and climate will affect the length of the growing season and the frequency which certain tasks will need to be done, therefore these examples should be viewed as a guide, to be amended for use in your particular school. A blank version is included at the end of this chapter - Checklist 4.

Feature	Inspections	January	February	March	April	May	June	Jul
BUILT FEATURES Bike stores Fences Gates Gutters and downpipes Litter bins Pergolas / pagodas/gazebo Sculpture Seats Sheds Signs Shelter Walls	Using a checklist : **Weekly** visual check for damage likely to cause a health and safety problem. **Termly** checks for signs of wear and tear likely to impair function. **Biannual** check to identify major refurbishment or replacement.	**Weekly** checks. First **biannual** survey to identify areas of rust or decay in timber, metal, stone or brick work which will need to be repaired, or replaced in the year ahead. Check all fixtures to ensure they are secure and in good condition. Identify gutters blocked by leaves etc. (e.g. water leaking or overflowing from gutters during heavy rain) and deal with the blockage. Carry out repairs if necessary.		**Weekly** check. Carry out repairs if necessary.	**Weekly** and **termly** checks. Carry out repairs if necessary.	**Weekly** check. Carry out repairs if necessary.	**Weekly** check. Carry out repairs if necessary.	**Weekly** ar second **Biannual** check ma the end of Plan repairs and replaceme especially t to be done during holidays. arrangeme for appro monitorir such work.
HARD LANDSCAPE All hard and paved areas Bridges Drainage channels, covers and gullies Footpaths Line markings - sports and play markings Playground surfaces Roadways Steps Wooden walkways	Using a checklist: **Daily** check where site is prone to excessive litter, especially glass, discarded syringes, dog faeces. **Weekly** visual check for damage likely to cause a safety problem. **Termly** checks for signs of wear and tear. **Biannual** check to identify major refurbishment or replacement.	**Daily** and **weekly** checks. Carry out repairs if necessary. Check for icy patches on main footpaths, playgrounds and roadways. First **biannual** survey to identify areas of rot or decay in timber, metal, tarmac or concrete which will need to be repaired, or replaced in the year ahead. Check for loose or cracked paving, tarmac and steps.		**Daily** and **weekly** checks. Carry out repairs if necessary Check for icy patches on main footpaths, playgrounds and roadways. Consider treatments to prevent weed germination on all hard surfaces.	**Weekly** and **termly** checks. Carry out repairs if necessary.	**Weekly** check. Carry out repairs if necessary.	**Weekly** check. Carry out repairs if necessary. Assess use of play markings and trial, then establish, any new markings during dry weather. Sports markings on hard surfacing should be clearly visible from a distance of 20m, be of uniform width and of the appropriate colour and layout.	**Weekly** c Second **bi-annual** made a of term. Plan repair replaceme especiall to be don during holid arrange for appro monitorin such work.
PLAY FACILITIES Fixed play equipment Playhouses Safety surfacing d pits	**Daily** visual check for any health and safety problems. Regular loosening of play grade bark chippings (weekly or fortnightly depending on level of use). **Termly** check (or more frequent if	**Daily** checks if facilities are in use. **Annual** (preferably biannual) certified inspection of all fixed play equipment. This inspection will include checks to identify areas of rust or decay in timber or metal work that will need to be repaired, or replaced in the year ahead. All fixtures must be checked to ensure they are secure and in good condition. Carry out repairs when necessary.		**Daily** check. Carry out any repairs necessary. Check for signs of impeded drainage where bark chippings are used for safety surfacing. Carry out remedial works	**Daily** and **termly** checks. Carry out repairs if necessary. Loosening of bark chippings as required. Topping up with play grade bark chippings as required to maintain correct	**Daily** check. Carry out repairs if necessary. Loosening of bark chippings as required.	**Daily** check. Carry out repairs if necessary. Loosening of bark chippings as required.	**Daily** chec and then **termly** / second **biannu** check to b made at th of term. Plan repairs an replaceme especially the to be done

Issues affecting grounds maintenance

As one might expect when dealing with the maintenance of outdoor areas, the climate, soil and aspect of a site will all affect the frequency and in some cases the nature of the maintenance that is required. In addition, school grounds are often used intensively and this can affect the rate of wear and tear on different areas of the site. Changes in the number or ages of pupils using a site, and changes in the the nature of site use may mean that the original school design cannot support current practices and, in the worst cases, design faults themselves cause problems for both maintenance and site use. Furthermore, there are a variety of regulations which may affect maintenance. The following sections look at each of these issues in greater detail.

Climate, site and soil conditions

One of the main reasons for there being no single definitive document to cover all grounds maintenance is that climate, site and soil conditions can greatly affect things such as:

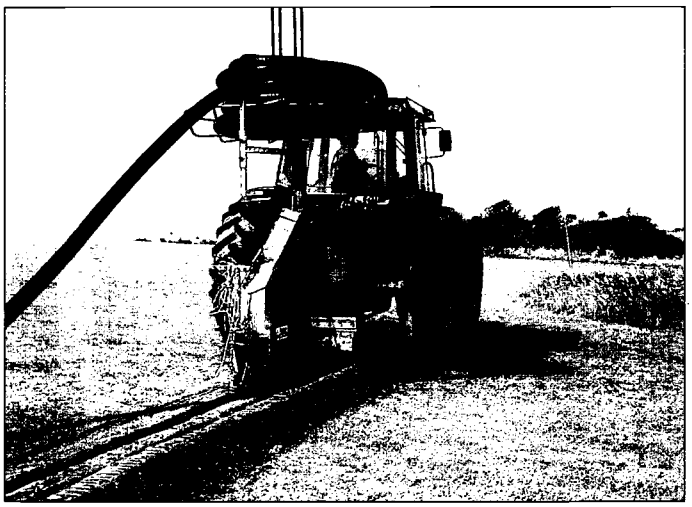
The rate of plant growth

Variations in the length of the growing season between the north and south of Britain and variations from year to year may mean that amenity grass needs cutting for anything between 6 months and 9 months. Similarly, tree and shrub growth may need to be pruned back annually in mild and moist climates but only biennially in drier and colder areas.

> **Example:** When a school produces a maintenance calendar for its site it needs to take local conditions into account.

Drainage systems for playing fields

The decision to provide a drainage system for a playing field will require a consideration of the amount and timing of the rainfall, the nature of the soil and the level of use which the pitch has to sustain. Fields prepared on old agricultural pasture may simply rely upon existing agricultural field drains whilst a high profile or specially constructed sports pitch may have sand-filled slits leading to a piped drainage system to speed up the rate of water removal from the playing surface. A school situated in an area of high rainfall but with a free draining soil may have no need to provide a drainage system on playing field areas. However, even a moderate rainfall on to slow draining clay soils may need a complex system such as sand slitting leading to drainage pipes. Both the pitch and the drainage system may need regular attention in order to prevent waterlogging, poor grass growth and the other problems that are often associated with poor drainage.



A tractor installs playing field drainage.

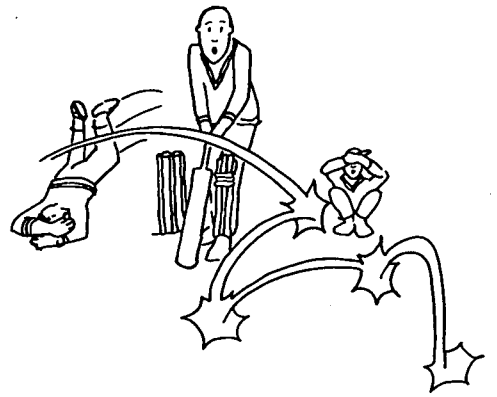
Example: A school which has a drainage system needs to ensure that both the budget calculations and the organisation responsible for maintenance such as the grass cutting and line marking of the area are aware of the location and the maintenance requirements of the system.

Surface water control on hard landscape areas

Rain will also fall onto playgrounds and footpaths and, as with playing fields, depending on the extent of rain fall, drains need to be designed and maintained so as to prevent puddling and, in winter, areas of ice formation. Such areas can damage the surface and be a safety risk as well as being nuisance.

Example: The regular sweeping or clearing of drainage channels and gullies to keep them free of litter and soil debris needs to be identified as part of a grounds maintenance agreement or placed within a job description.

The need for irregular maintenance activities



Tasks such as the rolling and spiking of grass pitches to provide a level and well-drained playing pitch may be undertaken on an infrequent and irregular basis depending on the combined effects of climate, soil conditions and use. Where a school site is heavily used, grass areas can become pitted and compacted leading to poor drainage, lack of air getting to the plant roots and a deteriorating playing surface giving unexpected ball bounce and direction. In the long term, neglect of such maintenance tasks, many of which now have to be specifically requested, can lead to an impenetrable layer of compaction which will require major pitch renovation, or, in the case of a cricket field, may cause a nasty accident. High or low rainfall and certain soil types can exacerbate such problems. Similar attention may also be needed where shrub beds are trampled and similarly compacted. The decision to undertake such tasks requires skilled understanding about site use and the soil conditions on the actual day therefore the exact timing or even requirement for such work cannot be planned in advance.

Example: If a school is considering letting their playing fields it needs to consider whether or not there will be an increased requirement for any maintenance activity, especially those that are only carried out infrequently such as spiking (to reduce compaction) or rolling (to ensure a safe level playing surface). Any additional costs need to be taken into account when setting the fees that are to be charged.

Ease of access for machinery onto certain areas

In wet weather, grass playing fields on clay soils take much longer to drain and dry out, extending the time that needs to be allowed before a tractor can get on to cut grass without causing ruts and damage to the soil and grass structure. As the grass continues to grow, decisions need to be made as to whether cutting can be delayed or lighter machinery needs to be used.

Example: A school which knows that it has fields that are prone to slow drainage but which are expected to meet the needs of both school and community should ensure that the company responsible for grass cutting are aware of the conditions and will be able to call upon lighter machinery if required to do so.

Design and microclimates

In most school grounds there are examples where the design of a feature creates microclimates that result in problems with the maintenance of an area. In an attempt to improve the appearance and value of such areas, schools may evolve elaborate systems to ensure plants survive but the best solution may involve a radical rethink of whether the feature should be there at all or whether a change in the design may ease the problems.

Example: A school building which has large overhanging eaves also has planting beds at the base of the walls. Plants in these beds struggle due to lack of rain and they always look patchy. In such a case the school may choose to increase the level of moisture retaining granules in the soil, redirect some of the rainwater collected from the roof or invest in plants for arid areas. However another choice may be to pave over the area taking care to avoid bringing children into contact with safety hazards such as open windows or causing problems with dampness in the building itself. The latter solution reflects a change in the design rather than an alteration of the maintenance as such.

Site Use

The maintenance of school grounds will be affected by the amount and nature of site use. Priorities in terms of use will be set by the headteacher and governors and, since every school is unique, it would be impossible to cover every possible type of use. However the following examples indicate the maintenance implications of certain common uses:

Formal curriculum use

If a school has provided a variety of wildlife habitats such as meadows, woodlands or ponds for study purposes, then maintenance may consist of annual tasks such as meadow cutting and clearance, clearance of extra pond vegetation and regular cutting of grass footpaths to allow easy access to the area.

Informal curriculum use

Some schools have a policy of allowing some meals to be eaten out of doors or encouraging quiet activities during break times and this may require regular clearance of litter, leaves and the maintenance of outdoor seating and shelters in certain areas.

If pupils are allowed to explore shrub beds and woodland areas these will require regular checks to ensure they can be safely used. There may need to be additional digging over of beds and possible exclusion of children at certain times of the year prevent soil from becoming compacted and affecting plant growth.

Extra curricular use

If a school prioritises school involvement in extra-curricular, as well as curricular, team sport for pupils, the provision of good quality sports pitches will be a priority. A large part of the school playing fields or tarmac areas may be set aside for sport and necessitate regular marking out, grass cutting or surface maintenance and seasonal renovation of sports pitches (such as reseeding bare goal mouth areas). In addition this work may need to be timed in order to avoid clashing with matches or to ensure appropriate marking out before matches.

Community use

In some parts of the country there exists a "community use" policy by the local education authority, while in other areas there is a level of agreed use of the grounds. Such use is normally in addition to school use and may or may not have been considered when the school site was designed or when the current maintenance method was established. With the advent of LMS there has also been a financial incentive for some schools to increase the level of community use. More frequent use of facilities will always increase wear and tear and the need for routine and additional maintenance. Apart from the extra number of games being played and the possible need for different line marking, the sheer weight difference will mean that the effect of twenty two children playing football on a grass pitch is likely to be significantly less than that of twenty-two adults! Similarly, pruning to remove eye-level branches from path edges may mean branches at the height of 1.6m for a Secondary school but may include those at less than 1m if a playgroup uses the site as well.

Community use may be formally agreed through dual use or joint provision agreements for a facility. The nature of any agreement for such use needs to be clearly understood when maintenance programmes of work are established and the grounds maintenance service provider needs to be aware of the nature of the relationship between the community group and the school. Arrangements to maintain the facility may form part of the dual use or joint provision agreement.

Dual use
This is the use of an existing facility by more than one organisation. Typically, it could be a simple leasing arrangement by a school with a local sports club but it may involve a longer term arrangement where the management and costs are on a shared basis.

Joint Provision
This means that the school and another organisation share the cost of providing a new facility for future dual use. Substantial sums of money may be involved and for this reason there will usually need to be a formal longer term agreement for the management and use. Such schemes will usually be given priority in applications for grants, for example, from the Sports Council, particularly if there is an identified local need for the facility.

Before entering into either type of arrangement it is important for a school to have undertaken an audit of the facilities that are available, their suitability for extra use and the likely demand that the schools themselves will create. It is also important to understand what type and extent of use the other partner will require and what standards of maintenance and upkeep will be needed. A top-class sports club will require a much higher standard of pitch preparation than a school and the extra costs of maintenance may exceed the rental charge. Pitch size requirements may also be different with adult users needing full sized pitches with wider overlap and safety margins.

Other things to consider include the following which may involve capital investment and/or planning applications:

- access and car parking arrangements;
- the availability and quality of changing facilities;
- the suitability of facilities for the age and ability range of the groups involved;
- floodlighting for synthetic and all-weather pitches;
- safety licence;
- costs - if costs are to be shared (as distinct from a simple charging of rent) there should also be a comprehensive Business Plan for the period of the agreement.

Regulations and legal issues

School grounds are recognised as one of the first public landscapes in which young people spend a significant amount of time. They are assumed, by both parents and pupils, to be safe simply because they are part of the school. It is, therefore, important that schools are aware of the regulations which may affect their site and the way in which it is maintained. There is no such thing as a completely safe site, but schools can reduce the risks by careful planning and by being aware of the legal issues relating to their particular site. Organisations or individuals responsible

for maintaining the school grounds need to be fully aware of those that apply to the site.

With respect to the outdoor environment there is an obvious need for schools to be aware of the toxic nature of certain paints, timber preservatives and plants. Ideally, future maintenance and possible risks associated with any new or renovated feature should be considered at the design stage and action taken to ensure safety by planning appropriate maintenance throughout. Similarly, when materials such as second-hand timber or garden plants are offered, schools need to be able to quickly establish if they will be a health and safety or maintenance hazard in the future.

Apart from the safety aspect, there are two further types of regulation - those which relate to the site itself and those which affect the maintenance and management of the site. Owing to the variations which exist within and between local government areas, schools will need to check the applicability of the examples below to their particular site and situation. There may also be local bye-laws which affect your site and these will need to be checked.

Details of the following, as they affect your site, may need to be included in grounds maintenance documents and should be part of a school grounds management plan.

Regulations relating to the site

Ownership

Although the majority of schools remain under the ownership of the local education authority, there are an increasing number of schools where a religious organisation (as in Church schools) or governors or trustees (as for Grant Maintained and Independent schools) are the actual owner of school land. Therefore, schools need to be aware of any covenants, restrictions or expectations that exist concerning the way school grounds can be developed and used. This, in turn, will affect the way in which they are managed, including maintenance.

For some Church Aided schools, the grounds remain the responsibility of the local education authority but the perimeter fencing may be the responsibility of the land owner, the church. You will need to clarify the situation at your school.

Building Conservation

Schools located in Conservation Areas or with listed buildings may be restricted in what they can plant against, attach to or paint on walls, including perimeter walls. Information about any such restrictions is available through your local authority, usually from the Planning or Environment Departments.

Tree Preservation Orders (TPOs)

As with buildings, trees can be protected through the placing of a Tree Preservation Order upon them. The presence of a TPO means that any maintenance, even simple pruning or works likely to disturb tree roots, needs to be agreed with the local authority in advance of work commencing. In order to check whether trees on the school site are protected in this way, contact should be made with the local authority, usually through the Planning or Environment Departments.

Services

Organisations responsible for providing water, gas, electricity, telephone cabling and sewage removal are collectively referred to as Services. These organisations have certain rights of access to and control over areas of land where their pipes and cables (overhead or underground) exist. For example, the planting of what will become tall trees is obviously unwise below overhead cables. Similarly, if trees are allowed to reach full size or if heavy machinery is brought onto site, their weight may damage underground pipes or cables. Knowledge of their location allows an alternative site or route to be chosen.

Any development of school grounds needs to be preceded by a thorough investigation of where Services exist and, since school playgrounds and playing fields were often thought to be unlikely to be built upon, a surprising number of pipes and cables run beneath them. Apart from the danger associated with digging up a pipe or cable, there can be additional problems if water or power supplies are disrupted to customers further along the line, with possible costs being levied against the school itself. Information about the Services that cross school grounds may be held by the local education authority but schools may need to contact each of the Service organisations

directly to ensure they are accurately located. There may be a charge for such enquiries and so initially a school can send a copy of their plans and state what they intend to do and ask if their plans are acceptable to the service company. It is also possible to hire equipment for detecting pipes and cables.

RIGHTS OF WAY

Many school sites have footpaths which cross their land. Some may have informal status whilst others will be formal Rights of Way. Information about the responsibility for Rights of Way, their location and constraints that are attached to them will be available from the local authority department which is responsible. This varies from authority to authority and may be housed at County Borough or District level. In addition, although there may be no legal requirement to do so, schools are advised to leave adequate access to their buildings for emergency vehicles such as fire engines and ambulances.

Regulations relating to school grounds maintenance and management

Your Local Authority Health and Safety Officer may be able to offer you advice about the full range of local and national regulations affecting school grounds. The following Acts of Parliament cover some of the national regulations which may affect your site and its maintenance.

LOCAL GOVERNMENT ACT 1988, and THE EDUCATION REFORM ACT 1988

The importance of these acts with respect to grounds maintenance has been described in Chapter 1.

HEALTH AND SAFETY AT WORK ACT 1974

Under this legislation there is a duty to ensure the safety of those who use the facilities being provided within the school, including the grounds. It aims to encourage a proactive approach in that schools must consider health and safety issues of features before any accidents happen. The Health and Safety Executive is the body charged with enforcing the Act - see Appendix 3.

CONSTRUCTION (DESIGN AND MANAGEMENT) REGULATIONS, 1994 (CDM)

The objective of these regulations is to manage people to plan work safely during the construction and refurbishment of certain structures. It is unlikely thay any school grounds maintenance task would be affected but where a school controls a group or individual in certain site development tasks, CDM may apply. More information can be obtained from the Health and Safety Executive (see Appendix 3) or your local Health and Safety Officer.

CONTROL OF SUBSTANCES HAZARDOUS TO HEALTH (COSHH) 1994

Introduced under the Health and Safety at Work Act, COSHH requires employers and others responsible for pesticide treatments (such as weed, moss or algae control in soft landscape areas or on hard surfaces) to assess the health risks, and then prevent or control the exposure of those applying pesticides and others to those risks.

FOOD AND ENVIRONMENT PROTECTION ACT 1985

The Food and Environment Protection Act was introduced to limit the variety of pesticides used so that only approved substances could be used for specified purposes and applied in specified ways. Pesticide users are now obliged to safeguard the environment, including all living animals, plants and prevent pollution particularly of water courses. Individuals who apply such pesticides need to be certified as competent and trained in this area of work.

ENVIRONMENT PROTECTION ACT 1990

Apart from the obvious benefits of having a litter free site, schools now have a responsibility to control litter on their school site. Information about how schools are affected by the Act and how they can tackle litter are available from the Tidy Britain Group (See Appendix 3).

OCCUPIERS LIABILITY ACT (1957, REVISED 1984)

As site "occupiers", schools may be liable to pay damages for injuries sustained by people using the site. Liability is likely to arise if a school provides a facility which is deemed to attract people onto the site but which is likely to be a danger to them. For example, if dangerous debris such as broken glass is left littering a play area. The school has a duty of care for pupils choosing to use facility but also a limited duty of care for others who enter, even if they are trespassing. erefore, for certain facilities, schools need to remember that their grounds maintenance should

ensure a safe environment for all likely site users.

THE REPORTING OF INJURIES, DISEASES AND DANGEROUS OCCURRENCES REGULATIONS 1985 (RIDDOR)

Certain accidents must be reported to the Health and Safety Executive. The Health and Safety Executive has published guidance on the regulations in *A guide to the RIDDOR Regulations 1985* (see Appendix 3).

LOCAL BYLAWS

There may be other local bylaws which affect your land and information about these is available from your local authority.

BRITISH STANDARDS

The British Standards Institution is the independent national body responsible for preparing British Standards. British Standards represent the United Kingdom view on the standards to be achieved in a variety of areas of work. Although compliance with a British Standard does not of itself confer immunity from legal obligations, some grounds maintenance organisations and contracts now refer to these documents. These standards represent good practice and may be referred to in any court case following an incident. Compliance with the relevant standards can be taken as evidence of the school's positive approach to safety.

With respect to school grounds maintenance, the following are relevant:

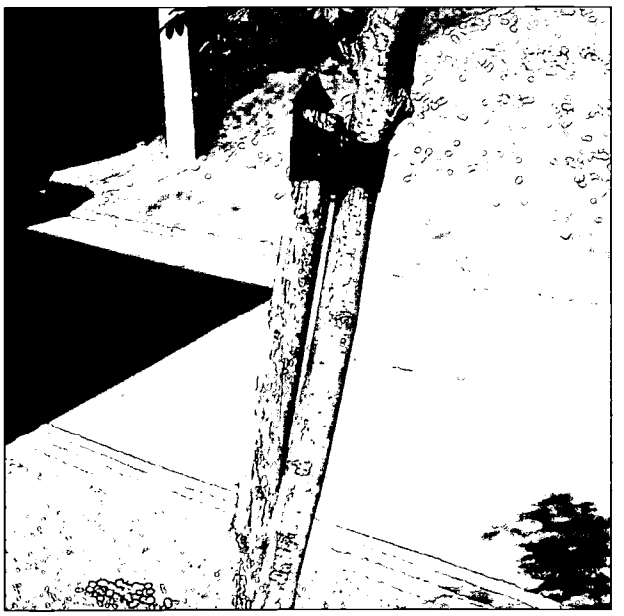
BS 7370 Grounds Maintenance (see Appendix 3 for further details)

BS 5696 Play equipment intended for permanent installation outdoors, Part 3 Code of Practice for Installation and Maintenance. (see Appendix 3 for further details)

The examples above are intended to stimulate thought about the way in which the wider environment affects maintenance. It is not intended as a finite list.

Schools, whether considering the maintenance of existing site features or of new developments, need to consider whether the design of a feature, and the planned maintenance and the budget allowed for this have taken into account the many issues raised in this chapter.

Fixtures such as manholes need to be carefully constructed to ensure they are level with the surrounding ground. If positioned too high or too low the area will look untidy and cause maintenance problems.



Maintenance of tree stakes is often forgotten with tree ties becoming too tight and stakes being left in place when they are no longer required.

Evaluating your current situation

It is likely that future legislation will further affect grounds maintenance, both in terms of the types of contract that can be used and the roles of local education authority staff. Whichever route your school selects to organise the maintenance of its grounds, it is essential that you evaluate the current situation before making any changes to your site and its maintenance. As for most aspects of school life, there will be a need for regular evaluation to ensure the needs of the whole school community are being met.

The checklists which follow will help you identify whether you are satisfied with the current level of maintenance, and which constraints apply to your site in terms of use, services and other legal responsibilities. It may be helpful to enlarge these using a photcopier.

Checklist 1 - Features requiring maintenance.

This checklist can be completed by identifying which features you have on site, for example you may use the Esso Schoolwatch Initial Survey.

Checklist 2 - Our Grounds Maintenance calendar.

This enables you to combine your site features (Checklist 1) and the maintenance they require (see Appendix 1 - Calendar of Grounds Maintenance Activities).

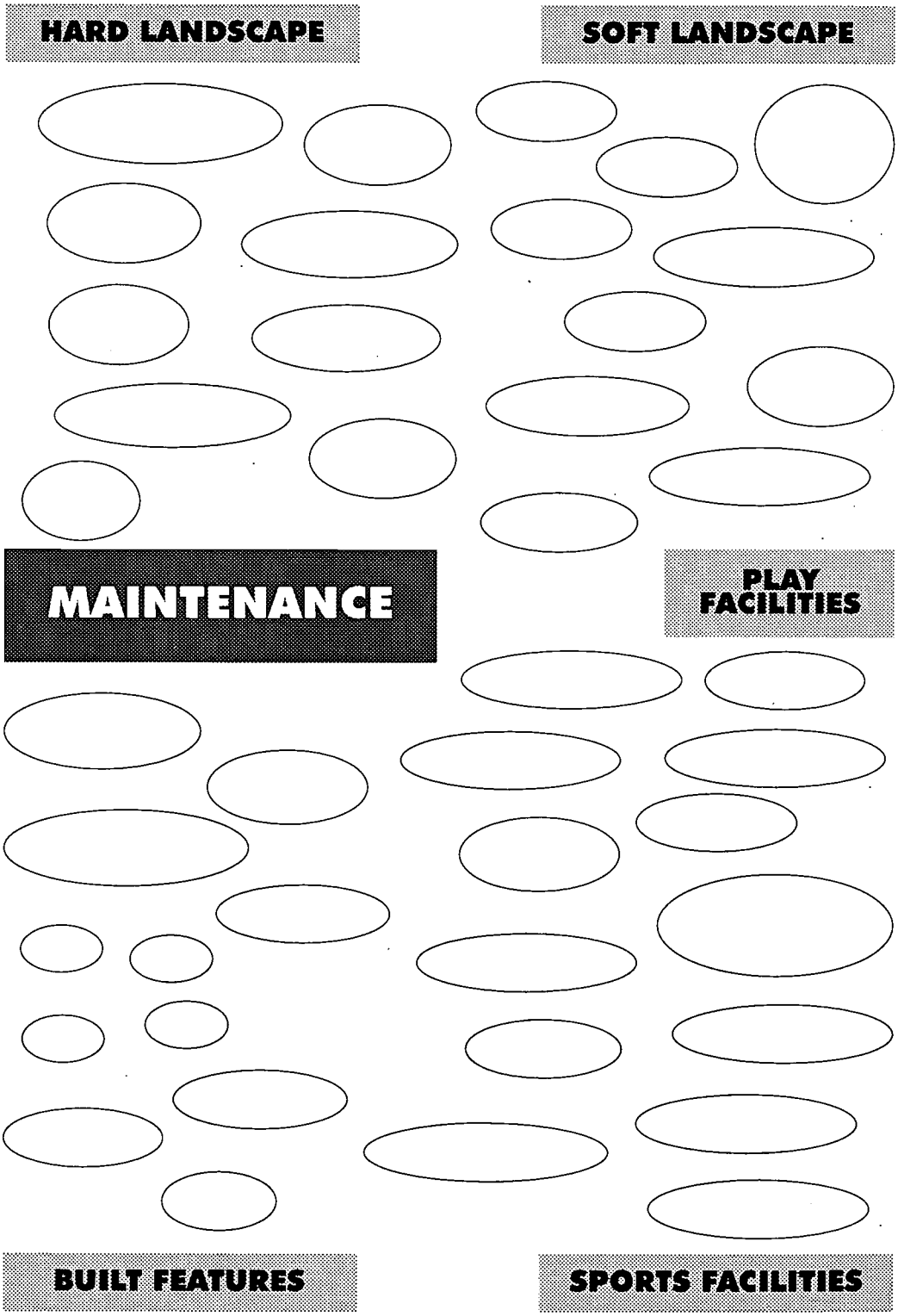
Checklist 3 - Quality of existing maintenance.

Having identified what you have got and how it should be maintained, this checklist will help you assess the current quality of your grounds maintenance and which areas need further improvement.

Checklist 4 - Constraints affecting our site.

This checklist will enable you to identify and clarify which constraints affect your site. These may affect both maintenance and further development of your site.

Checklist 1 - Features requiring maintenance



Checklist 2 - Our grounds maintenance calendar

Feature	Inspections	January	February	March	April	May	June	July	August	September	October	November	December

Checklist 3 - Quality of existing maintenance

Obviously at certain times of year, some tasks will have just been done and others will be just about to be done. This checklist is only intended as a guide - you may need to add features not mentioned or miss out those which are not present on your site.

Suggested code for indicating condition

G = Good; **A** = Average; **NI** = Needs improvement

	RESPONSE	CONDITION
General Cleanliness		
Is paper and foreign debris absent from lawns and hard surfaces?	Y/N	
Are pond areas free of cans, bottles and rubbish?	Y/N	
Are any litter bins on site overflowing? (Emptying litter bins is unlikely to be included with general grounds maintenance.)	Y/N	
Groundstaff		
Do they notify the school when they arrive on site?	Y/N	
Are they clean and polite when on site?	Y/N	
Do they wear a recognisable uniform?	Y/N	
Do they maintain a clean work area?	Y/N	
Do they remove all debris when they leave the site?	Y/N	
Trees		
Are there dead, diseased or dying trees on site?	Y/N	
Has any pruning of branches been sensitively done?	Y/N	
Are the bases of newly-planted or specimen trees free of weeds for the first 3 - 5 years?	Y/N	
Is there evidence of damage at the base of trees caused by machinery?	Y/N	
If used, is the depth and quality of mulching adequate around the base of trees?	Y/N	
Are there any suckers growing from the base of specimen trees?	Y/N	
Do any branches interfere with traffic or pedestrian access?	Y/N	
Are tree ties and supporting stakes in good condition and not causing damage to the tree itself?	Y/N	
Hedges		
Have the hedges been cut properly to shape (For wildlife hedges the base should be wider than top)?	Y/N	
Are there any dead, diseased or damaged plants in the hedge?	Y/N	
Are there any gaps in the hedgerow?	Y/N	
What weed growth is present at the base of formal hedges?		
Is there any litter in the hedge?	Y/N	

Checklist 3 (continued)

	RESPONSE	CONDITION
Shrubs & Groundcover Plants		
Are formal shrub beds free of weeds and tree seedlings?	Y/N	
Has pruning been satisfactory (i.e. it reflects the natural shape and allows flowering if appropriate)?	Y/N	
Where formal shrub beds are adjacent to grass areas, are the edges tidy and free from grass growth?	Y/N	
Are there any dead, diseased or dying plants present in the bed?	Y/N	
If a weed-controlling mulch has been used, is it of sufficient depth (10cms)?	Y/N	
Are beds free of litter?	Y/N	
If there are areas of open soil are these weed free and not compacted?	Y/N	
Climbing Plants		
Are any windows covered by plants?	Y/N	
Are plants properly attached to walls?	Y/N	
If there are trellis or wire supports for plants, are these securely attached to the wall?	Y/N	
Are plants pruned properly?	Y/N	
Herbaceous Plants		
Is there evidence that all unwanted dead vegetation was removed last autumn?	Y/N	
Are there any dead plants or conspicuous dead flowers?	Y/N	
If necessary, have plants been staked?	Y/N	
Are bare areas free of weeds, cultivated or mulched?	Y/N	
Is there any litter amongst the plants?	Y/N	
Planted Tubs and Raised Beds		
Are the plants healthy?	Y/N	
Are they free of weeds?	Y/N	
Have they been adequately watered and appropriate fertiliser applied?	Y/N	
Lawns & Sports Fields		
Has the grass been cut to required height?	Y/N	
Are broad leaved weeds, moss and/or fungi under control?	Y/N	
Has the grass been trimmed around poles, fences etc?	Y/N	
Are there any areas where there is no grass left growing?	Y/N	
Have grass clippings been removed if this was requested?	Y/N	
Have any new areas of grass seeding or turfing established satisfactorily?	Y/N	
Is there any evidence of water lying on any grass areas?	Y/N	
Are the goal mouth areas level or are they eroded into hollows? (the latter might be expected at the end of the playing season but should be repaired before the beginning of the next season)	Y/N	
there any dangerous hollows or holes, especially in pitch or etics areas?	Y/N	

Checklist 3 (continued)

	RESPONSE	CONDITION
Sports Equipment & Facilities Check goal posts and boxes, netball posts, tennis nets and posts, cricket practice nets and athletics equipment such as throwing cages and pads. Are they clean, painted (if necessary), free from rust, rot or damage?	Y/N	
Are goal posts and boxes securely fixed and at the correct height and angle?	Y/N	
Line-marking of pitches, court areas and athletic facilities - are the lines clearly visible across the area, continuous and of the required width?	Y/N	
Play Equipment Are any areas of impact absorbing surface around play equipment in good repair and free from litter?	Y/N	
Is the play equipment itself in good repair? (If metal, is it free from rust or jagged edges, if wooden, is it free from splinters, rot etc?)	Y/N	
If appropriate, has it been adequately treated with paint or preservative?	Y/N	
Are all screws and nuts tight and not protruding dangerously?	Y/N	
Other Built Features Are all signs on your site legible?	Y/N	
Are sign and lighting poles straight and painted?	Y/N	
Are fences/walls straight, upright and in sound condition?	Y/N	
Are gates in good working order?	Y/N	
Are there any gaps in fencing due to damage?	Y/N	
If appropriate, have fences and gates been painted or stained?	Y/N	
Are benches clean, not broken?	Y/N	
Are bicycle racks secure and tidy?	Y/N	
Are any bridges or pond dipping platforms safe?	Y/N	
Are sculptures and statues in acceptable condition?	Y/N	
Are seats, picnic tables and other outdoor furniture in good condition and appropriately painted/stained?	Y/N	
Are pergolas, gazebos, sheds and outdoor shelters in a good state of repair and appropriately painted/stained?	Y/N	
Erosion Control Do grass areas beside paths suffer from erosion?	Y/N	
Are all slopes covered with vegetation (grass,trees,shrubs/ground cover plants)?	Y/N	
Are the downspouts from gutters and drains from buildings linked to a drainage system or water butts so as to avoid washing away soil and plants from beds?	Y/N	

Checklist 3 (continued)

	Response	Condition
Footpaths, Roadways & Other Hard Surfaces		
Are these free of uneven stones, brick or other hazards?	Y/N	
Are these free of restrictions such as eye or hand level sharp branches which may affect disabled users?	Y/N	
Are these free of holes, weeds, moss/algae and litter?	Y/N	
Are the kerb edges of these clean and not broken or loose?	Y/N	
Are steps free of debris and broken or loose material?	Y/N	
Are any knee, kick or guard rails straight, painted and clear of weeds?	Y/N	
Is line marking for games, traffic or pedestrian control visible and in good condition?	Y/N	
Are areas for car parking clearly marked?	Y/N	
If gravel and stone paths are present, is there evidence of stones migrating onto adjacent areas?	Y/N	
Is there any evidence of water lying on any of these areas instead of draining away?	Y/N	
Are the channels leading to surface water drains free of soil and debris?	Y/N	
Are all the surface water drains free of blockages such leaf or other litter?	Y/N	
Sustainable Management		
Does the school site include compost bins for cuttings and leaf litter?	Y/N	
Are shrub prunings shredded and reused for mulching?	Y/N	

Vandalism

Which areas of your school site prone are to vandalism?

What is the nature of that vandalism?

Checklist 4 - Constraints affecting our site

Ownership, especially restrictive clauses.

Rights of Way.

Planned sale of land.

TPOs, Building Conservation orders etc.

Community use.

Disabled Access.

Local authority plans or major development proposals.

Power lines and other services.

Effects on neighbouring land (light, leaves, etc.).

Checklist 4 (continued)

Planning constraints over removal or addition of large amounts of soil.

Presence of red-databook species or protected plants and animals.

Existence of trees planted under schemes like Woodland Grant Scheme where renegotiation of the grant might be required.

Groups using our school site for extra-curricular activities.

Groups using our site for community activities.

Teachers known to be active in using school grounds for curriculum activities.

Other constraints (e.g. soil conditions, climatic issues etc.)

3

ORGANISING MAINTENANCE

Key questions

- Have you appointed the most appropriate organisation to carry out your grounds maintenance?
- Do you know the nature of the agreement you have with them?
- Do you know how much your grounds maintenance costs?
- Are you aware of the different ways in which you might organise your grounds maintenance?
- Do the job descriptions of a number of your school's staff reflect responsibility for an aspect of grounds maintenance?
- Is the organisational model you have chosen for your grounds maintenance easy to operate?
- Does it ensure a high quality end result and give you value for money?

Introduction

Grounds maintenance can be organised in a number of different ways and may involve a variety of groups and individuals. A school's choice will depend on a number of factors including:

- the nature of maintenance work to be done on your site;
- the amount of work to be done;
- the financial resources available within your school budget for this work;
- the availability of expertise and time within your school community to manage or actually carry out this aspect of site management;
- the existence within your area of local authority client services officers or landscape management consultants who are able to help you organise your grounds maintenance;
- the availability within your community of individuals, community groups or landscape maintenance contractors who can provide the level of service you need;

This chapter describes;

- which organisations and groups carry out maintenance on school grounds;
- what types of maintenance agreements are used;
- which models of organisation are used.

For each aspect there is a summary of the key issues affecting schools.

Types of grounds maintenance groups and organisations

As a result of the legislation described in Chapter 1, schools are now able to consider using one or more groups or organisations to carry out maintenance on their site. This section looks at the main types of grounds maintenance provider and considers the issues associated with each type. For each one there are descriptions of the most suitable areas of grounds maintenance work followed by a description of the provider.

Schools may work with a variety of grounds maintenance groups.

GROUP 1

Contractors and DSOs

Nature of work suitable for contractors and DSOs

All aspects of sports and amenity grounds maintenance such as large scale grass cutting, weed and moss control, marking out of sport pitches, erection of goal posts, renovation of worn pitch areas, specialist sports facility maintenance, simple shrub bed and garden maintenance. Some may also offer wildlife habitat maintenance and marking out of tarmac surfaces. Some contractors and DSOs will work with pupils on certain tasks although their involvement may reduce flexibility in terms of timing and method of working. In addition to general grounds maintenance itself, some contractors may offer specialist advice about grounds maintenance and new landscape works.

Description

As a result of the Local Government Act 1988 and LMS most schools have become accustomed to the use of "contractors" (either DSOs or private sector) for certain tasks including grounds maintenance. As this type of provider is usually managed through a formal contract agreement, it is the contractors responsibility to provide training, supervision and the necessary machinery for their staff. The contractor may be represented by an individual based fully or part-time on site, by mobile teams or by a combination of these. This will depend on the nature of work, the extent of the site and the details of the formal agreement. In most situations staff will work to written instructions only, to ensure compliance with the contract. However, some contractors remain flexible. While the school can ask for any additional work to be done and most contractors are keen to be flexible, it is essential to realise that there may be costs involved.

The DSO contractor would, in most circumstances, be known to the school having in all probability undertaken contracts for them on previous, or even current, occasions. Their knowledge and experience of the school grounds may be greater than that of a commercial contractor although it is recognised that their work may have been biased towards maintaining sports fields, amenity grassed areas and limited garden maintenance, reflecting the traditional features of school grounds. However, familiarity can lead to a lack of knowledge as to the extent of work to be undertaken under new management arrangements and it is in the interest of both parties to be clear about the content of their agreement. In the case of a DSO, they may also offer direct management of grounds maintenance for schools not affected by CCT legislation. In addition to the DSO attached to the local education authority, DSOs from neighbouring districts may also tender for, and win, grounds maintenance contracts.

A private sector contractor may be part of a large national or even international group or may be a small local operator. Such contractors may have access to different specialist skills in their organisation.Any contractor new to the site will require an establishment period, with closer supervision, until they are familiar with the site and the detail of the work.

GROUP 1 OVERVIEW:

Grounds Maintenance Group or Organisation:
Contractors and DSOs.

Type of agreement with school
Contract for services.

Which schools can use this group
Any school.

Nature of work suitable for this group

Specialist sports maintenance, large scale grass cutting, routine garden maintenance works.

GROUP 2

Directly employed groundsperson or site ranger as a member of staff

Nature of work suitable for directly employed grounds staff.

Depending on the skills of the groundsperson this may include all aspects of sports and amenity grounds maintenance including care of wildlife habitats. However, as this will often be an individual rather than a team, the following tasks are more likely to be included: small areas of grass cutting, maintenance of shrub beds, general and specialist garden maintenance, marking out of sports and games and care of wildlife habitat areas. Other activities may include litter control, development of new garden or habitat areas, repair to fences or boundaries, checking of safety surfacing below play equipment, other minor repairs and similar duties.

Description

Some schools have returned to employing full–time or part–time ground staff. Directly employed staff are, or should be, totally dedicated to the needs of the school and can work as part of a whole support team of providers, depending upon the size of the grounds. In some schools a "site ranger" has been appointed. Their job remit includes involving pupils in maintenance where appropriate and may include teaching pupils, using the site and its resources, according to a programme agreed with other teaching staff. Such a person may also have a role in helping teaching staff to make greater use of the school grounds as a teaching resource.

GROUP 2 OVERVIEW:

Grounds Maintenance Group or Organisation:
Directly employed groundsperson or site ranger as member of staff.

Type of agreement with school
Contract of employment / contract of service.

Which schools can use this group
CCT exempt schools, independent schools.

Nature of work usually undertaken
Small areas of grass cutting, general & specialist routine garden maintenance, line marking for sports, wildlife habitat maintenance, general site maintenance such as litter control, minor repairs etc.

GROUP 3

Community-based organisations

Nature of work suitable for community-based organisations

These organisations commonly undertake specific tasks, often associated with specialist habitat maintenance or infrequent tasks such as annual shrub pruning. However depending on the skills base of your local community groups they may also wish to be involved in maintenance of wildlife habitats, grass cutting, garden maintenance, painting of murals or maintenance of outdoor seating or fencing. They can also provide training and advise on the creation and use of habitat areas.

Description

Organisations such as a local Wildlife Trusts, a Groundwork Trust , a British Trust for Conservation Volunteers (BTCV) group and other local environmental groups are included in this group. Although these organisations may do work for no charge, in some cases payment will be required. By bringing such organisations, with their specialist interests, into school, staff and pupils will have contact with groups who they can then work with on community based projects either as part of a school experience or as an individual in their own time.

Community Service personnel have also worked in schools, often carrying out specific maintenance or development tasks where the local area office can offer particular skills. The tasks and the work programme need to be discussed well in advance to ensure compliance with all the regulations and special consideration may need to be given if personnel are likely to be working with children.

GROUP 3 OVERVIEW:

Grounds Maintenance Group or Organisation:
Community-based organisations.

Type of agreement with school
Informal agreement - although an exchange of letters or a telephone call, when the headteacher asks the group to do some work, can constitute a contract. *Care should be taken to ensure that appropriate insurance cover is available in case of personal injury or accidental damage to property.*

Which schools can use this group
Any school.

Nature of work usually undertaken

Wildlife habitat and garden maintenance, painting of murals or outdoor structures, training and advice.

GROUP 4

Volunteers, including parents and pupils

Nature of work suitable for voluntary groups

This will depend upon what learning opportunities teachers wish any school pupils and the group members to obtain and what skills are available within the group. The most common aspects to be maintained in this way are garden areas including seasonal plant beds, tubs and pots, children's gardens, growing plots for vegetables and flowers, animal housing, using the greenhouse, small area grass cutting and wildlife habitat areas. An example of a cooperative group of volunteers who share maintenance work is described in Chapter 5.

Experience has shown that it may be unwise to rely on volunteer groups to take on large scale and extensive maintenance tasks such as grass or meadow cutting. Even if the present group of volunteers agree to be responsible for such long term maintenance of wildlife habitats, for example, the actual work they will be able to do can only be decided on a short term basis since they may be unable to give commitment beyond the present term or year whilst their child is in school.

Description

Volunteers such as the PTA, retired and non-employed members of the local community are involved in grounds maintenance in some schools. Increasingly schools are realising the potential benefits to be gained from involving pupils, as part of formal, informal or extra-curricular activities, in both the development and on-going maintenance of certain areas of their school site.

Although there is the advantage that such groups may not charge for their services, most schools who use them find that there are other, more valuable, benefits. For example, some schools have chosen this group to allow greater pupil involvement, and associated learning opportunities, provided participants are not restricted to just weeding. Such involvement can foster caring attitudes and a feeling of ownership for the school as a whole. In addition, for many children the school may offer their only opportunity for such activities. Others have found that an elderly or unemployed person can bring different perspectives and skills to be shared with pupils and staff whilst also encouraging their own feeling of self worth within the community. Experience has shown that a school should not expect volunteers to make commitments that will be too demanding upon their time, particularly if there are other projects to be undertaken either for the school or in the community. Furthermore, if there is a need for a aspect of the work to be done at short notice it is not possible to guarantee the group will be available to do the task.

GROUP 4 OVERVIEW:

Grounds Maintenance Group or Organisation:
Volunteers, including parents and pupils.

Type of agreement with school
Informal agreement. *Care should be taken to ensure that appropriate insurance cover is available in case of personal injury or accidental damage to property.*

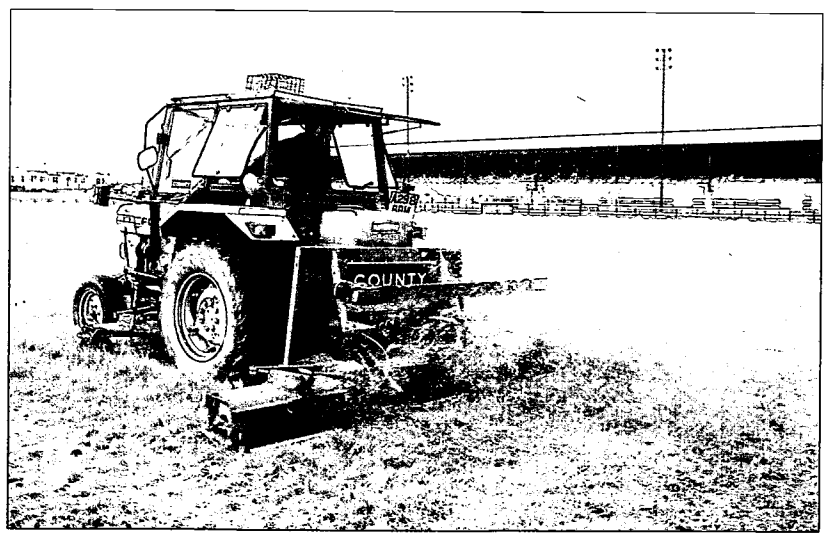
Which schools can use this group
Any schools.

Nature of work usually undertaken
Wildlife habitiat and garden maintenance, painting of murals or outdoor structures.

Types of grounds maintenance agreement

Just as every school has unique character and a unique site, so there are a variety of grounds maintenance agreements. The types of agreement included below describe those most commonly used by schools at this time. Depending on which type of agreement is being used, the school's role will vary and these are described at the end of each agreement type. However all schools should ensure that:

- the type and content of the agreement meets the schools needs and takes into account site features, site use, soil and climatic conditions and the budget available;
- where more than one agreement is in place for grounds maintenance, all parties are aware of their particular role and, if appropriate, which areas of the site they are expected to work within;
- pupil and staff safety has been taken into account;
- arrangements for authorising payment for work done will stand up to scrutiny by auditors.



The type of grounds maintenance agreement you have will determine who carries out tasks and how this is done.

AGREEMENT TYPE 1

Contract agreement

A contract in its simplest form is the agreement between two parties to discharge certain obligations. One will undertake to carry out work or provide services, the other will undertake to pay for that work or those services. Those services may be carried out by an individual or a team of grounds staff based either on the school site or at the contractors own site.

As described in Chapter 1, schools are becoming more involved in the use of contracts as a result of the legislation relating to LMS and CCT. Even where schools have been exempted from following the CCT procedure, they may still be required to follow contract procedure in order to comply with their local authority's own Standing Orders and Financial Regulations.

Nationally recognised standard forms of contact relating to new landscape construction have been available for some time. Some local authorities have adapted these standard forms of contract whilst others have drafted their own forms of contract which meet their own specific needs. ILAM is currently producing standard forms of contract for grounds maintenance. The reasons for using these standard forms, suitably amended, rather than in–house written conditions can be summarised as follows:

- They have been written by lawyers experienced in contracts of a broadly similar nature and consequently take account of the relevant legislation and case law.
- Contractors are familiar with their terms and conditions, which may be reflected in lower tender prices.
- The rights and obligations of both parties are clearly set out and the contracts themselves are unambiguous.
- Legal fees should be unnecessary or kept to a minimum.

See Appendix 4 for further details concerning contracts.

Key stages for contract agreements

Contract preparation.
Putting together the relevant documents and ensuring the schools needs will be met.

▼

Contract tender procedure.
The procedure whereby contractors are invited to tender for the contract.

▼

Contract letting.
Selecting a competent contractor whose tender price represents value for money and is within the schools allocated budget figure.

▼

Contract monitoring.
Monitoring that the work is completed as agreed within the Contract Specification (described below).

▼

Contract variation.
Altering the contract to take account of changes that take place in site use or to the physical nature of the site.

▼

Authorisation for payment.
When work has been completed to a satisfactory standard.

▼

Payment

▼

Contract termination, renewal or re-letting.

Contract Documents

Contracts will usually include the following documents:

- Preliminaries
- Site Plan
- Specification
- Bills of Quantities.

If a contract for grounds maintenance has been let for your site, some or all of these documents will exist somewhere and it is essential that you are familiar with them and know where they are located. The names of these documents may vary but the quality of information provided in them will greatly affect the efficiency and smooth running of the contract. Whether a school grounds contract is being let for the first time or is being renewed, the school should be in a position to influence the content of the contract as it relates to their site. The following brief descriptions are intended to help you identify which documents you have and their purpose. These and other contractual terms are included in the Glossary in Appendix 2.

Preliminaries - describes the form of contract being used and sets out guidelines for how the contract will be managed.

Site Plan - an accurate site plan showing the location of the features to be included and /or excluded from the contract. Some contracts may not have this document but it is useful in ensuring all of the areas to be maintained are included in the contract and have been identified by the contractor.

Specification - a descriptive document which deals with the nature and quality of the work to be undertaken. From the schools point of view this is one of the most important documents as it should clearly set how how each feature will be maintained. Two types of Specification are commonly used:

1 Frequency/Operation Specification - defines exactly when and how many times tasks are to be undertaken. For example, how often the grass in a certain area is to be cut, to what height and at what times. Monitoring a contract with a Frequency or Operations Specification involves checking the site after each operation, including work undertaken during school holidays, in order to be confident that the agreed number of operations have taken place to the standard described. This will involve knowing which operations will take place and when. Since the total number of operations may not be known at the beginning of the contract (for example, variations in the length of the growing season may mean that 3 or 4 extra cuts are needed in order to keep the sports pitches in a playable condition), the financial costs may not be exactly known. The effects of this can be reduced by including a contingency sum in the contract. The school will still be in control as it will have to order the extra work to be done.

2 Performance Specification - concentrates on the final result that is required. It is the responsibility of the contractor to decide when and how to undertake the work. For example, the grass in a certain area is to be cut so as to keep it between 25mm and 50mm in height. Monitoring a Performance Specification involves checking the site to ensure the agreed standard of work is being reached. This will entail knowing what the Specification says in relation to the features present on your site. The total costs will be known at the beginning of the year although including a contingency sum is still recommended to accommodate any unexpected changes in condition.

Sometimes contracts may contain an element of both. The type of Specification affects the way in which the contract is supervised and therefore can affect the way in which a school chooses to organise its school grounds maintenance.

Bill(s) of Quantities, Site Data sheets or Measured Works - these deal with the quantity of each operation, such as grass cutting, to be carried out. These are priced by the contractor so that the cost of each grounds maintenance operation, and its associated request for payment, can be identified. Provisional costs and rates for dayworks are needed for infrequent operations such as drain clearance or fertilising of sports pitches may appear as part of this document or separately.

The strengths and possible weaknesses of contract agreements for school grounds maintenance are outlined overleaf.

Contract agreements

Strengths

- ✚ The contract will lay out all the tasks to be done, the standard to be achieved and the method of achieving it, so that both parties to the agreement have full knowledge from the very beginning.
- ✚ A written contract makes the task of monitoring work easier.
- ✚ The letting of contracts through the competitive tender procedure should ensure you get value for money and comply with all the relevant legislation.
- ✚ Depending upon the contractor and the workload, it may be possible to arrange a contract so that grounds staff are based at your school site on a part or full time basis, thus giving you many of the advantages of having site based grounds staff. For example, the site based groundsperson, while having personal commitment to the site, will be able to call upon the organisation, rather than the school, for specialist equipment or training which may only be needed infrequently.
- ✚ The contractor is responsible for ensuring extra staff to cover in times of holiday, sickness or for tasks requiring a team rather than an individual.
- ✚ A contract is a legally binding document and if there is failure to comply on the part of the contractor, there are recognised routes to follow to ensure you are compensated.

Weaknesses

- ➖ The letting and monitoring of contracts can be complex and requires an understanding of contract law. A school should obtain legal advice from an appropriately qualified person to ensure that its interests are fully protected.
- ➖ If the contractor uses a mobile team of workers there may be a delay in getting a response to a request for action.
- ➖ Depending on how you choose to organise your contract, there may be a further time delay if your request has to be passed through a unit or individual managing the contract on your behalf (see Model 1 in Chapter 3).
- ➖ If a contractor chooses to use mobile teams some schools may feel that this may not encourage a sense of ownership and pride in their work on the part of the work force.
- ➖ The contract documentation must be written to cater for the school's specific needs. Any changes to the site which a school makes without informing the contractor through the appropriate route, may leave the school open to a claim for compensation from the contractor.

School role in contract agreements

- Ensure contract documents are legally sound and reflect the needs of the school community.
- Ensure any failure on the part of the contractor is quickly identified and dealt with.
- If the school takes responsibility for monitoring the contract it must have access to the relevant documents.
- Ensure the contractor is informed and the contract formally altered if there are any changes to site use or site content.

Service-level agreement

This type of agreement can be used in areas where the local authority has retained an active grounds maintenance DSO and where schools have been exempted from following CCT procedure (described in Chapter 1). It may also be used by schools and local conservation groups, such as the Tower Hamlets Environment Trust (see Chapter 5).

When using a service-level agreement, both parties agree on the work that is to be done (i.e. the service to be provided), the costs involved and the length of time for which the agreement will run. These discussions may take place directly between DSO or group and school, or may take place through the client services unit. In the latter case there may be a charge for setting up the agreement and, if the school chooses, for continuing to monitor the work being done (see Model 1 in Chapter 3).

Service-level agreements

Strengths

- ✚ The level of service and its cost is clearly identified at the beginning.
- ✚ The DSO or group is responsible for ensuring extra staff to cover in times of holiday, sickness or for tasks requiring a team rather than an individual and for providing specialist equipment and staff training.
- ✚ Where a group or consortium of schools work together there are opportunities for schools to obtain reduced rates because of the benefits of scale.

Weaknesses

- ➖ There may be a tendency for the DSO to simply continue to do what has been done in the past. The school, therefore, should pay particular attention to the content of the service level agreement to ensure it meets the schools needs.
- ➖ The school has to be certain that the group will be able to complete the work and provide appropriately trained staff to do so.
- ➖ If the DSO or group uses a mobile team of workers there may be a delay in getting a response to a request for action.
- ➖ In the current competitive market DSOs and some local organisations are seeking work in a variety of areas and a school may need to monitor work closely to ensure they continue to get the standard agreed in the Specification.
- ➖ Depending on how you choose to organise your agreement, there may be a further time delay if your request has to be passed through a unit or individual managing the contract on your behalf (see Model 1).

School role in service level agreements

- Ensure the service level agreement must be written to cater for the schools specific needs.
- Ensure the DSO or other maintenance group is informed and the service level agreement is altered if there are changes to site use or site content.
- Ensure that the work is monitored and is done to a satisfactory standard.

AGREEMENT TYPE 3

Informal agreement

The nature of informal agreements varies from a verbal agreement to an exchange of letters, accompanied by a detailed description of the work and working methods involved. This type of agreement may be used when a school is working with a local conservation group, for example, and may also include pupil, parent or staff involvement in the work. Although no formal contract tendering procedure has been followed, even this informal agreement can constitute a contract and therefore schools involved in this type of agreement need to be aware of the issues described above concerning contract agreements.

Informal Agreements

Strengths

- ✚ The school will be in full control of the nature and content of the agreement which can be very specific to the needs of the site, the school and the group providing the service.
- ✚ Flexibility can be built into the agreement and is unlikely to affect any charges involved.
- ✚ Informal agreements can be simple to set up although care needs to be taken to ensure safety of people and property.

Weaknesses

- ➖ If there are problems such as unsatisfactory work, it may be difficult to evaluate this if there is not a clear description of the standard of work expected.
- ➖ If the arrangement is informal, and especially if no charge is being made, it may be difficult for a school to make a complaint about unsatisfactory work or get a problem rectified within an appropriate timescale for the school.
- ➖ The school may need to look in greater detail at issues such as health and safety and insurance cover.
- ➖ The group supplying the service may bring different staff on site at every visit.

School role in informal agreements

- Ensure the content of the agreement will cater for the schools specific needs.
- Ensure that the work is monitored and is done to a satisfactory standard.
- Ensure they and/or the group involved hold insurance cover in the event of there being an accident involving personal injury or damage to property.
- Ensure they and the group involved have full knowledge of current legislation regarding health and safety issues relating to this sort of work.
- Ensure the safety of pupils and the site especially through checking on the background of any personnel working with pupils.
- Ensure everyone is clear about what they are expected to do and where they are allowed to work.

Direct employment of a staff member

The employment of a groundsperson will be similar to that for other staff members and the contract of employment should reflect the needs of the school. The nature and extent of the work undertaken by directly employed staff varies to take account of the needs of the site, the abilities of the employee and the number of grounds staff being employed. They may also be used for other aspects of maintenance within the school building.

However this agreement type is not available to every school. It is an option for schools that are:

- exempted from CCT compliance (see Chapter 1);
- Independent;
- seeking maintenance work which is outside of the regulations for CCT.

Direct employment of a staff member

Strengths

- ✚ On site ground staff are under the direct control of the school and can give immediate help to school staff particularly in the event of an emergency or altered priorities.
- ✚ Such staff can work closely with pupils on grounds development projects.
- ✚ Direct labour is probably more economic for work that is difficult to predict in advance or to specify and measure accurately e.g. clearing storm damage or preparing for sports events.
- ✚ On site staff will be able to take immediate advantage of suitable ground conditions to carry out specific tasks such as rolling and spiking of pitches.
- ✚ Staff can be encouraged to develop pride in the care of the grounds, receive job satisfaction and provide loyalty to the school.
- ✚ Depending on their skills, such staff may be able to provide specialist knowledge about the creation and maintenance of habitat areas.
- ✚ The person's duties can be shared with other tasks including those of caretaker, cleaner, etc.

Weaknesses

- ➖ The workload of a groundsperson is variable and from November until early March is one third less than the work needed in the summer peak time. Other work must be found for the winter months and/ or additional staff support in the summer months.
- ➖ Schools need to remember that certain aspects of grounds maintenance cannot be undertaken by a single grounds person - for example erecting rugby poles.
- ➖ The school will have to purchase or hire expensive, specialist machinery which may only be needed infrequently. As a result, unless shared with neighbouring schools, it will inevitably be greatly under utilised.
- ➖ The school is responsible for finding additional cover during holidays, sickness, accidents and training.
- ➖ Finding a person with the necessary skills may take time and perseverance and the school may require expert assistance when interviewing candidates for this type of work.

School role in directly employing staff

- Identifying the work to be done, advertising the job and interviewing potential employees.
- Normal employer responsibilities including training, compliance with health and safety regulations and the other relevant regulations described in Chapter 2.
- Providing the necessary storage areas, machinery and work space.
- Overseeing the work programme to ensure that the school's needs are met.

Models for organising grounds maintenance

This section looks at some models which schools use to organise grounds maintenance and considers the issues, the advantages and the disadvantages associated with each model. Effective organisation of your school grounds maintenance should enable the school to:

- obtain value for money;
- budget more effectively;
- be in full control of the appearance and uses made of their site;
- maximise involvement in terms of pupils, staff and overall school community;
- ensure continuity of care in light of changing staff and pupils and existing workload of staff;
- provide a quality learning environment and maximise the benefits that can be gained from the school site;
- integrate future developments into maintenance, curriculum and budget planning.

The following models of organisation provide the range of options open to schools and the model chosen by a school will be affected by the same issues that affect maintenance, namely:

- the extent of the work to be done - the size and content of the site;
- the nature of maintenance work to be done on your site;
- the financial resources available within your school budget for this work;
- the availability of expertise and time within your school community to manage or actually carry out this aspect of site management;
- the existence within your local area of a local authority client services unit or landscape management consultants who are able to provide the service that meets your needs;
- the availability within your school community of contractors, community based groups and interested parents, teachers and pupils to carry out the work within your budget.

Case studies which reflect some of these models are included in Chapter 5.

Schools organise the maintenance of their sites using the four types of agreement relationship described in the previous section - contract, service level, informal and direct employment. There are, broadly speaking, three models for organising these agreement types:

Model 1 - using an agent to manage grounds maintenance on the school's behalf.

Model 2 - direct management by the school itself.

Model 3 - a combination of models 1 and 2.

Within these three models there are some variations. These are described in this section and the strengths, weaknesses and issues associated with each are discussed. Certain models are more appropriate when using certain agreement types and certain organisations providing grounds maintenance services. This is indicated where appropriate.

Whichever model of organisation is chosen it is likely that, for some tasks, individuals from outside the school and heavy machinery will be coming onto school property. In addition, with the increasing involvement of the whole school community in site development and maintenance, the issue of personal safety must be considered at all times.

Using an agent to manage your grounds maintenance

Currently the most common model of organising maintenance is to use an outside agent to do this on your behalf. At present this is most likely to involve a local authority Client Services Unit which may be based independently within the authority or may be attached to Education, Leisure and Recreation or Property Services Departments. They may consist of staff from the former Playing Fields Division or may be a new unit responsible for all services affected by CCT such as cleaning, catering, grounds maintenance and vehicle maintenance. Increasingly such units will charge for their services at either a fixed rate or based on a percentage of the overall contract. Such units may continue with direct management of grounds maintenance for schools exempted from CCT legislation although it is likely that there will be a charge for this service.

With local authority changes taking place and greater autonomy for schools as result of LMS, some schools are now appointing a landscape consultant to act as their agent for overseeing grounds maintenance works. Landscape professionals, such as landscape architects, have traditionally been involved in the design, construction and maintenance of new landscapes. The involvement of private sector landscape professionals in the on-going maintenance of schools grounds, parks and housing areas is relatively recent and a new role - that of landscape manager - has been created. A number of professional bodies exist and membership of these should ensure standards are met. These are described in Appendix 3. A school using a landscape consultant will need to have a contract of employment with that consultant.

When an agent is used there will be a charge for the service. The amount paid for the services of an agent vary and therefore a school will need to satisfy itself that the fee is reasonable and is taken into account when budgets are planned.

MODEL 1 OVERVIEW: USING AN AGENT TO MANAGE YOUR GROUNDS

Grounds maintenance usually covered by this model
All aspects, particularly sports field and garden maintenance.

Type of agreement used
Contract Agreement.
Service Level Agreement.

Description of tasks undertaken by the agent

Depending on the abilities of the agent, they are likely to undertake all or some of the following:

1. Preparation and letting of contracts in accordance with national and local government legislation including:
   - preparation of the appropriate tender documentation, including Preliminaries, Bills of Quantity and Specifications; to ensure that prospective contractors have sufficient information on which to base tenders;
   - administrative work connected with contract preparation including the advertising of contracts both nationally and locally;
   - vetting of prospective contractors for a select list ensuring that they meet the necessary technical, financial and quality criteria;
   - analysing and evaluation of tenders to ensure the best possible value for money and quality of service;
   - awarding or advising on the award of contracts.

2. Day to day supervision of contracts such as :
   - monitoring of work standards and to ensure contract compliance (note, this aspect may have been delegated to the school itself);
   - mediation in the event of problems such as non-completion or unsatisfactory completion of work;
   - alteration to contracts, processing any necessary variations, maintaining accurate documentation and financial records;
   - routine visits to confirm that the school is content with the standards being received.
3. Invoicing and handling payment for work done.

In addition, some agents may offer: specialist advice about grounds maintenance, specialist advice about new landscape works, advice on health and safety issues, technical advice concerning materials and equipment or help schools to appoint their own grounds staff or let their own contract.

Using an agent

Strengths

- ✚ They are responsible for the majority of the time consuming and complex aspects such as the contractual process including assessing potential grounds maintenance organisations for competence.
- ✚ They are responsible for ensuring compliance with all the appropriate legislation and obtaining appropriate legal advice.
- ✚ Where the agent is a Client Service Unit they may have a long standing relationship with your site and so be aware of likely problems and solutions.

Weaknesses

- ➖ The contractor may view the agent rather than the school as the main customer and not feel obliged to enter into direct communication with school staff.
- ➖ It may be the responsibility of the school to provide full contract documentation - although some agents may offer to prepare such documents as part of, or in addition to the main contract.
- ➖ There can be difficulties in resolving problems quickly as all communications may need to go through the agent (although this can be resolved).
- ➖ Some agents may be limited in terms of the type of agreement they are prepared to manage.
- ➖ There is likely to be a charge for the service.

School role when using an agent

- Be familiar with the extent of work to be undertaken under contract in light of any new type of agreement.
- Be clear about what is expected of the school and the agent, particularly in terms of the monitoring of work on a regular basis.
- Know how, where and when to contact the agent, especially in the event of unsatisfactory work and preferably have an identified person within the school who is responsible for all contact with the agent.
- Choose an agent who has experience in landscape management and not just landscape construction.
- Remember they are working for you - make sure they provide the service you need and are paying for.

Direct organisation of grounds maintenance by the school

Depending on the scale of maintenance required and the skills and workload of staff, a school can choose to manage grounds maintenance directly using a variety of methods. If a staff member is to supervise grounds maintenance it will need to be a specific part of their job remit so as to ensure continuity in the event of staff changes. A teacher, a technician or the school bursar may be suitable candidates. Depending on the method chosen such a person will need to possess or learn some specific skills. Training linked to provision of, access to and understanding of the relevant documents may be needed.

The most obvious benefit a school will gain from managing its grounds maintenance directly is that the school will be in complete control of the work and may feel more confident about obtaining a quality service. The major drawback is that school staff time is required for the initial establishment and on going running of such a model. It may be possible for some aspects to be passed to a nominated individual within the parent or Governor body. However some schools, particularly Secondary schools, have decided that school maintenance, including that of the grounds, can be linked to other administrative tasks and they have created the post of School Bursar or given a financial incentive to a teacher or technician to take on this role.

The following variations in Model 2 are described below:

- 2A - School managed contract
- 2B - School employed grounds staff
- 2C - School managed community based organisation
- 2D - School managed volunteers (including pupils and staff)

Whichever of these variations is chosen, clear responsibility needs to be allocated within the school so that the desired results, in terms of grounds maintenance, personal safety and financial resources are achieved.

There are any number of exciting ways in which a school can become directly involved in maintaining its grounds.

MODEL 2A

School-managed contract

A school can let a contract by inviting tenders from private contractors. The school may choose to only invite tenders from companies which have previously been vetted for competence (either by an agent or by the local authority if they appear on that authority's select list of contractors). If a school includes an invitation to a DSO to tender for the work then the school will need to follow the full CCT process whether or not the school is exempt from CCT itself. Should the school choose to exclude the DSO, it will still have to let the contract in a way which meets the local authority's own Financial Regulations and/or Standing Orders, although these are likely to be less complicated than the CCT requirements. In addition, it makes financial sense to invite tenders from a number of companies to ensure you are getting value for money.

Selecting a commercial contractor can often be very difficult especially for the first time. It can be done simply by personal recommendations although this may lead to allegations of impropriety. Local Authority Standing Orders may dictate the number of quotations to be sought. It is advisable for the school to obtain a list of reputable contractors (preferably who are members of a trade organisation such as The British Association of Landscape Industries (BALI) and also to ask other schools in their area about their experiences.

A guide to the process of contract letting and more detailed information is given in Appendix 4.

MODEL 2A OVERVIEW: SCHOOL MANAGED CONTRACT

Grounds maintenance work usually covered by this model
All aspects.

Type of agreement used
Contract
Service Level Agreement

School-managed contract

Strengths

- ✚ The school has full control over the whole procedure.
- ✚ The school and contractor can deal directly if any problems arise.
- ✚ The contracts can be for less that the 3 or 4 year term if CCT regulations do not apply.

Weaknesses

- ➖ The process of contract management is time consuming with the school being responsible for all the agent's tasks described under Model 1.
- ➖ Someone within the school has to have the time and knowledge to supervise the contract.
- ➖ It is probable that the school will need to seek and pay for legal and technical guidance, especially when preparing and letting contracts.

School role in school-managed contracts

- Ensure any companies invited to tender and the successful contractor are sound and have experience in this type of work.
- Identify at the outset what roles the school and the contractor will fulfil.
- Ensure the content of the contract meets the needs of the school. This will involve providing suitably detailed contract documentation.
- Ensure there is clear understanding about who, within the school, has responsibility for grounds maintenance issues, especially in the event of unsatisfactory work on site or in the event of the contractor having to inform the school about any issues.

School employed grounds staff

Some schools have returned to employing full or part time grounds staff. This option is available to schools which are exempt from CCT and those in the independent sector. Such staff may undertake all or some grounds maintenance tasks and will require management as for any other staff member.

MODEL 2B OVERVIEW: SCHOOL EMPLOYED GROUNDS STAFF

Grounds maintenance usually covered by this model
All aspects depending on the skills of the employee and, if tasks require more than one person, the number of employees available. However, such employees are often used for smaller tasks such as garden maintenance, grass cutting of small lawns and amenity grass areas, care of goal and netball posts, wildlife habitat maintenance and specific preparations for sports or open days.

Type of agreement used
Contract of employment

School employed grounds staff

Strengths

- ✚ The school is in full control of the content and timing of the work.
- ✚ The school should have the full commitment of its staff to ensure the best possible quality is achieved.

Weaknesses

- ➖ The school is responsible for the initial identification of work and preparation of a work programme. Technical advice may need to be bought in.
- ➖ Finding a person with the wide range of technical abilities and able to communicate and work with children and teachers, if necessary, may take time and perseverance.

School role in employing grounds staff

- Ensure the work programme to be undertaken by the grounds person is clearly identified.
- Ensure all the normal employer's responsibilities are met including adequate training, support, cover for times of illness and compliance with relevant legislation.
- Remember certain tasks, such as erecting rugby goal posts, can not be done single-handed and additional costs should be included in budgets.

MODEL 2C

School managed community-based organisation

Relationships with community based organisations such as Groundwork Trusts, British Trust for Conservation Volunteers (BTCV), Community Service personnel, Urban/County Wildlife Trusts may be formalised in an contract or remain as an informal agreement between the two parties. However they will still involve the school in management tasks in order to ensure work is completed within the expected timescale using the agreed methods.

MODEL 2C OVERVIEW: SCHOOL MANAGED COMMUNITY-BASED ORGANISATION CONTRACT

Grounds maintenance work usually covered by this model
The groups involved tend to focus on new landscape development, particularly of wildlife habitats and certain built features such as footpaths, raised beds etc. Their involvement in school grounds maintenance tends to focus on the after-care of these features and covers tasks such as pond clearance, meadow and hedge cutting, garden maintenance.

Type of agreement used
Contract
Service Level Agreement
Informal agreement

School managed community-based organisation

Strengths

- ✚ The school will be in full control.
- ✚ Costs may be low or non-existent.
- ✚ It provides an opportunity for the school to link with the wider community.
- ✚ It may be easier to involve pupils with the group in maintenance and educational activities.
- ✚ Personal links made between the group and pupils may be continued after pupils have left the school.

Weaknesses

- ➖ Such organisations may only undertake a limited range of maintenance activities (such as woodland, ponds, meadows etc).
- ➖ It may not be possible to get a quick response in the event of unsatisfactory work or an emergency.
- ➖ Staff members may vary at each visit resulting in lack of continuity and issues of personnel screening with respect to working with young people.
- ➖ Monitoring will be the responsibility of the school.

School role in managing community-based organisations

- Ensure the community organisation is reliable, capable and has experience in this type of work.
- Ensure there is a clear understanding as to what roles the school and the organisation will fulfil.
- Ensure the organisation has adequate insurance cover in the event of an accident involving individuals or damage to property and is aware of the relevant health and safety issues.
- Ensure there is a mechanism for dealing with unsatisfactory work.

MODEL 2D

School managed volunteers

Managing volunteers can be both rewarding and time consuming. Ideally they should work through an agreed programme which details what they will do, the standard expected and the timing of this activity. Volunteers can include school neighbours, Governors, parents, pupils and staff either as part of formal lessons or as extra curricular activities. Careful consideration and forward planning is needed to ensure the safety of people and property when working with volunteers.

MODEL 2D OVERVIEW: SCHOOL MANAGED VOLUNTEERS

Grounds maintenance work usually covered by this model
Garden maintenance tasks and wildlife habitat maintenance.

Type of agreement used
Informal agreement

School managed volunteers

Strengths

- ✚ The school has full control and this model can allow full flexibility.
- ✚ Some aspects of the work may be done for reduced or no costs.
- ✚ Involvement with the school in this way can foster community relations and community commitment to the school and may reduce vandalism.
- ✚ Attention to the fine detail of maintenance may be easier to achieve without the constraints of time and / or money.
- ✚ The educational opportunities can be fully exploited.

Weaknesses

- ➖ The school will need to allow for the fact that volunteers may not be able to give commitment over a long period of time or provide a quick response.
- ➖ It is unlikely that your volunteer group will have the skills needed, for example, for sports pitch preparation and therefore they may be restricted in what they can do.
- ➖ In the event of a problem developing on site or unsatisfactory work, there is no guarantee that volunteers will be readily available to carry out any necessary tasks.
- ➖ Monitoring will be the responsibility of the school.
- ➖ Arranging appropriate insurance cover and safe working practices are the responsibility of the school.

School role in managing volunteers

- Provide a detailed and readily available programme of work.
- Ensure training and suitable equipment is provided if necessary.
- Ensure there is a clear understanding at the outset as to what work the volunteers are expected to complete and who, within school, is responsible for coordinating the work.
- Ensure school has adequate insurance cover in the event of an accident involving staff and volunteers or damage to property.

Combination of two or more of the above models

With many changes in the uses of the grounds such as development of wildlife habitats, play facilities and more attractively planted areas, there may be a need to consider identifying different groups and types of agreement for specific types of work. For example, specialist sports field maintenance or large scale grass cutting may be successfully completed under contract whilst specialist gardening skills may be found in a community group, with a volunteer or with a small contractor.

Alternatively, within the budget identified for grounds maintenance it may be possible to continue to have a contract that covers most of the large scale work whilst employing a grounds person for just a few hours a week to improve the standard of the school estate by undertaking activities such as litter picking, manual weeding of hard areas, planting of annual bedding plants at major focal points and maintenance of high profile borders or specialist areas.

Combination model

Strengths

- ✚ The quality of work may be improved by using specialist contractors for each type of work.
- ✚ Some aspects of the work may be done for reduced or no cost.

Weaknesses

- ➖ There may be confusion between groups with each not knowing about or accidentally interfering with the others area of work.
- ➖ In the event of there being damage on site there may be disagreement as to who is responsible for repairs, and the school may end up paying additional costs.
- ➖ This arrangement involves dealing with more than one contact and therefore is more complicated in terms of management.

School role when using a combination of models

- Schools which chose to use a combination of management models will need to ensure that there is absolute clarity as to the roles of all the groups involved and, if necessary, provide detailed documents including recognised entry and exit routes on and off the site for each group. This should avoid the possibility of one group blaming another for damage that has occurred, leaving the school to pay for repairs. Furthermore, monitoring of maintenance tasks is likely to fall upon the school and this aspect of management needs to be clearly allocated within school in order to avoid a situation where no-one takes responsibility and standards are allowed to fall.

Assessing your current situation

There are a variety of types of groups and organisations currently working in the field of school grounds maintenance, linked to those schools by one or more or a range of agreement types. Nationally, most schools have moved from a position of having grounds maintenance carried out, with little direction from the school, by a local authority work force, to a situation where the school is in control of what is done where and by whom. Furthermore, there has been a move to involve pupils and the whole school community in this process where appropriate.

The appearance, use and management of school grounds all convey powerful messages to the pupils and staff who have to work in them and so it is important that they accurately reflect the ethos and needs of that school community. If a school is not satisfied with its current standard of grounds maintenance they will need to review where the problem originates. The tasks being completed need to be matched to the abilities of the chosen grounds maintenance group, be clearly agreed using an appropriate type of agreement and be organised in an effective manner.

Difficulties may arise because the selected organisation is not capable of doing the work, the type of agreement is inappropriate, there is insufficient (in terms of frequency or skill) monitoring or lack of awareness about the content and location of relevant documents and organisations who can provide support or simply through lack of active management of this aspect of the school.

In the previous chapter you will have identified what requires maintenance and whether you are satisfied with the standard of your current maintenance. The following checklist will help you assess how grounds maintenance is organised on your site and help you identify any problem areas.

Checklist 5

HOW IS GROUNDS MAINTENANCE ORGANISED IN OUR SCHOOL

Tick

Which type of group(s) currently maintain our grounds?

Contractor

DSO

Directly employed grounds staff

Teachers

Pupils

Community groups

Volunteers

What is the nature of our agreement with them?

Contract

Service level agreement

Informal agreement

Contract of direct employment

Which model of organisation operates at present?

Using an agent

School-managed contract

School-managed community group

School-managed volunteers

School employed grounds staff

A combination

If the school grounds are currently maintained under contract:

Who is/are the contractor(s)?

Which type of contract specification has been used?

Frequency

Performance

A mixture

Which contract documents do we hold in school?

Site plan

Specification

Bill of quantities

Tick

Site data sheet

Work programme

Schedule

Who is responsible for monitoring the work and compliance with the contract?

If someone within the school community is responsible for monitoring, does that person have access to the relevant documents?

Y/N

Who do we need to notify about changes in maintenance requirements?

If the school is using an agent to manage a contract on their behalf, are we satisfied that the agent has got the skills and the size of work force to monitor appropriately?

Y/N

If we are not satisfied with the current standard of grounds maintenance can we identify the reasons, such as:

- inappropriate agreement type? Y/N
- inappropriate agreement content? Y/N
- insufficient (in terms of frequency or skill) monitoring? Y/N
- lack of awareness about the content or location of relevant documents? Y/N
- inappropriate choice of grounds maintenance group for the task? Y/N
- poor quality of work by grounds maintenance group? Y/N

What is the current budget for this aspect of school maintenance?

£

Who is responsible for authorising payment for grounds maintenance work?

Name:

When does our current agreement come to end?

4

REVIEWING GROUNDS MAINTENANCE AND PLANNING FOR THE FUTURE

Key questions

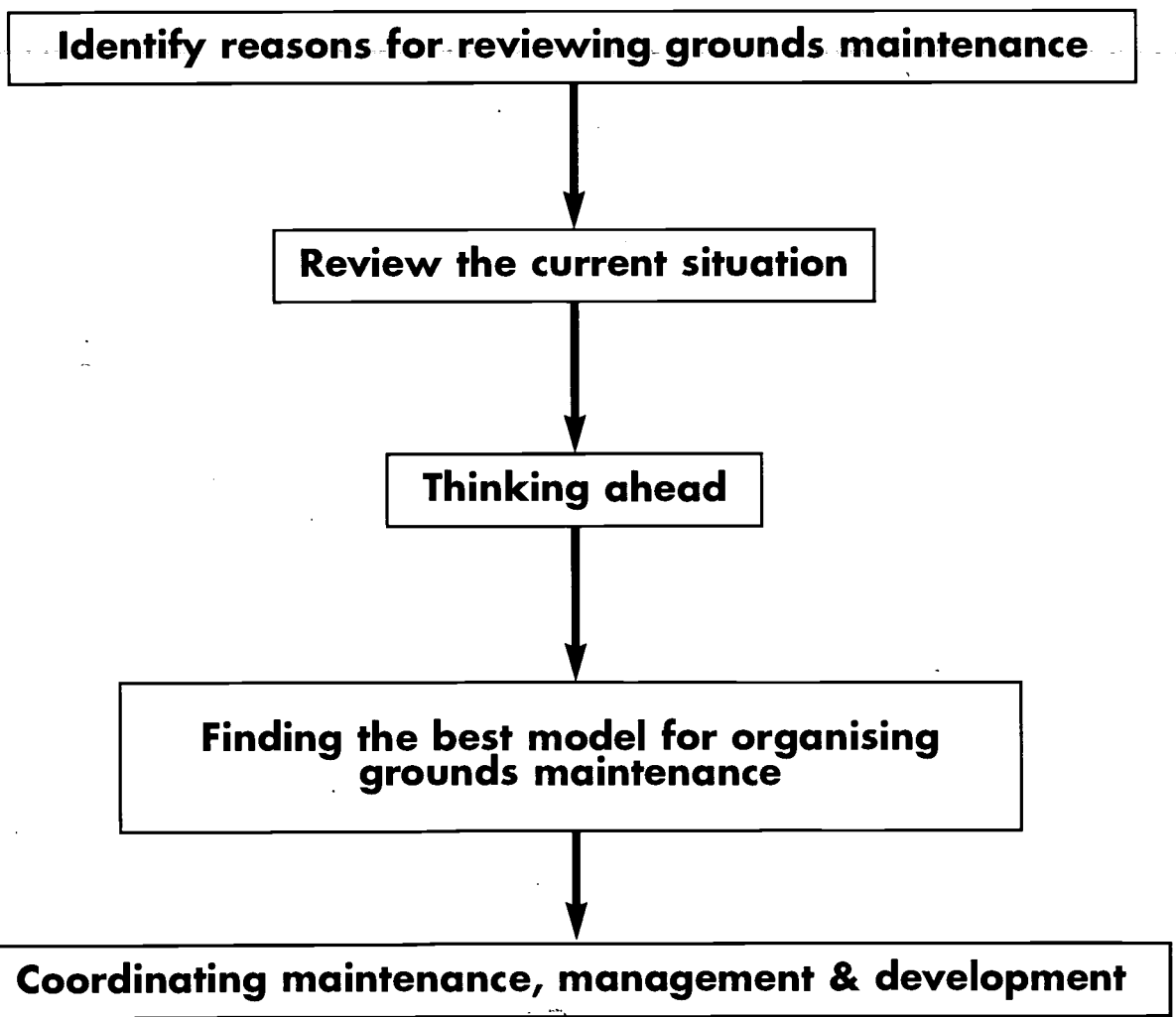
- Have you analysed all the possible grounds maintenance options?
- What will be your grounds maintenance requirements in the future?
- Have you gathered all the necessary information in order to ensure you receive a good quality service and provide a good quality landscape in the future?
- Have you produced a school landscape management plan as part of, or in addition to, your School Development Plan?

Introduction

Effectively maintained school grounds should:

- provide good quality resources to stimulate formal and informal learning;
- ensure the school grounds are a safe and attractive environment;
- reinforce and complement education about sustainable living;
- ensure the healthy growth of all trees, shrubs and grass areas;
- encourage local wildlife and, hence, biodiversity;
- enable young people to understand and participate in caring for their environment;
- take into account future plans for site and curriculum development;
- allow for use by the wider community, where this is wanted;
- provide a value-for-money service.

Whatever reason a school has for reviewing its grounds maintenance, the information required is broadly similar. The following charts will help you analyse the information you have already gathered as a result of Checklists in Chapters 2 and 3 and help you identify any issues which may affect your future maintenance.This will help you to identify the most appropriate model for organising and budgeting for your grounds maintenance in the future. In the process you will have gathered all the information you require in order to produce a landscape management plan for your school grounds.



FIRST STEP - Identify reasons for reviewing grounds maintenance

Do you wish to maximise site potential?

Do your Governors need to ensure value for money or need to cut costs?

Have you existing plans to change the site or the way it is used?

Are you unhappy with the present appearance of school grounds?

Is your current grounds maintenance contract up for renewal?

SECOND STEP - Review the current situation

Which site features will require maintenance?
Checklist 1

↓

What maintenance do they require?
Checklist 2

↓

Is the current standard of maintenance satisfactory?
Checklist 3

↓

What constraints affect our site?
Checklist 4

↓

How is grounds maintenance currently organised?
Checklist 5

THIRD STEP - Thinking ahead

Do you have any plans to increase or alter formal curriculum use, informal use, extra curricular use, community use? If so, what are they and what effect will they have on maintenance?

Refer to School Development Plan.

Are there any plans to increase or alter pupils, staff and/or community involvement in caring for the school environment?

Refer to School Development Plan.

Which features will require maintenance?

Add any features you have planned to create to Checklist 1.

What maintenance will they require?

Refer to Appendix 1 and incorporate any additional maintenance requirements described by manufacturers etc. in Checklist 2

When will your current agreement will be renewed? - *Refer to Checklist 5.*

If your school changes from its current agreement, which documents will be available to you to use in future and will they need updating due to changes in site use or content? If so, who might do this work for you?

What grounds maintenance expertise will be available within the school (staff, parents, governors)?

Is there help available in the community (consultants, contractors, advisers, local Further Education colleges, community groups)?

What will the grounds maintenance budget be?

What others budgets or finance may be available in light of any planned curriculum projects, proposed changes to the site or the way the school intends to use it?

FOURTH STEP - Finding the best model for organising grounds maintenance

What are the best type(s) of grounds maintenance model(s) which will allow you achieve your aims.

Look again at Chapter 3 in light of the information gathered already.

FIFTH STEP - Coordinating maintenance, management and development

The preparation and regular evaluation of a landscape management plan should ensure that ongoing maintenance and future changes can be timetabled and organised effectively.

(More detail about this is contained in the following section.)

Time spent on particular kinds of management produces stimulating results at certain times of the year.

Planning for the future

School grounds management aims to conserve and enhance the quality of the school landscape for present and future users, according to a detailed plan, so that the school site continues to meet the needs of the school community. Pupils, teachers, parents and governors all change over time. The facilities school grounds contain and the use that is made of them changes with the seasons and also over longer time periods, reflecting changing curricular and social trends. In order to ensure the grounds continue to provide all that a school requires of them there is a need to produce a management plan or schedule which will take into account, as a minimum, the routine maintenance work that needs to be done (what, where, when and by whom) linked to a timetable for introducing new features or activities. Ideally a school landscape management plan will go further. It will include details of:

- The aims and objectives for your own school grounds
- Existing site features (e.g. a full site survey such as that provided in *Esso Schoolwatch - The Initial Survey)*
- Constraints and relevant regulations that affect the site
- Planned site developments
- Current and intended future site use
- Grounds maintenance work
- Community involvement
- Financial and other resources that will enable the work to be done.
- Evaluation or regular reviews of progress.

Regular reviews of progress.

As school sites are constantly changing in small, and in some instances, major ways, it is important for schools to undertake regular reviews of both the quality and organisation of grounds maintenance. As sites and models of organisation change and develop, the checklists completed during the initial review may need to be amended. However, subsequent reviews will become easier as information will be readily available and, by using a school landscape management plan, the activities can be planned and shared within the school. Most importantly, personal safety, site security and environmental quality will be seen to have been given careful consideration by the governors and headteacher.

5

CASE STUDIES

- The following case studies were provided by schools and organisations involved with school grounds maintenance. They cover only a selection of the possible models and organisations involved in grounds maintenance but this should not be taken as an indication that these are best practice to follow.
- Case studies 1 - 5 involve schools.
- Case studies 6 - 8 cover organisations which work with schools on grounds maintenance.

Case Study 1

SECONDARY SCHOOL, OXFORDSHIRE.

School description and extent of work

This large Secondary school in Oxfordshire has grounds extending to 7.5 hectares.

The school has 800 pupils, aged 11-18 years.

The site consists of:

- Playing fields used for sport and detached from the main school site. A poorly drained section is used for study purposes.
- Playing fields immediately adjacent to the school buildings and used extensively for sports and recreation during lunch and breaktimes.
- Lawn and grass areas, including a small orchard, pond and seating area, which are used for recreation and occasional study purposes.
- Specimen trees, shrub and flower beds and occasional pots of plants occur within the lawn and garden areas.

Formal curriculum use

Sports - football, rugby, hockey, rounders, cricket and athletics.

Science - study in garden and marshy area of playing fields.

Informal use

Recreational use of lawn and garden areas and recreational football on the playing fields adjacent to the school.

Community use

The playing fields beside the school building are frequently hired out to local sports groups for competitions and practice - archery, athletics, football.

Grounds maintenance groups and the work done

The majority of the playing fields maintenance is carried out under contract by Commercial Services. In addition, pruning of roses and shrubs, weedkilling on paved areas, edging of grass areas and sport preparations (marking of lines, erecting goal posts and nets, preparing cricket wickets) are included in the contract. Commercial Services is a former DSO, now acting as privatised contracting services.

The caretaking team and a teacher with horticultural skills carry out the annual care and planting of hanging baskets, pot plants, flower borders and some areas of shrub planting.

Nature of agreement

The contract with Commercial Services is renewable every 3 years.

The caretakers and teacher are directly employed.

Model of organisation

Model 3 - a combination of Client Services-managed contract and directly employed staff.

For work carried out under contract, an agreed schedule of work to the chosen standard is lodged with the school at the start of the contract. The contracting staff must leave reports of work that has been completed. These must be signed by the receptionist at the time of completion and are then checked by the school and the monitoring officer from Client Services. Within the school, monitoring is done by the Site Manager, with guidance from the Head of PE if appropriate. The Site Manager and Client Service monitoring officer report directly to the Headteacher.

The areas of work carried out by school staff are planned and organised by the staff themselves. They report directly to the Site Manager and the Headteacher.

Reasons for choosing this model

The school feels that it would be unlikely to create a better service or get a better price through its own efforts, than can be achieved from using Commercial Services.

Regular negotiation for the contract is dealt with by the agent and not hard pressed school managers.

The mundane tasks such as extensive mowing are left to the contractor who has invested in the necessary machinery. The school benefits, through reduced costs, because of economy of scale across the county.

The new contract arrangements give the school more effective links with the workforce.

The exact nature of what the school can demand of the contractors is much clearer.

The in-house school based caretaking team can work on smaller yet very important aspects of grounds maintenance which ensure the site is attractive for residents and visitors alike.

Costs

Average annual cost for general grounds maintenance	£8000
Additional tree works average annual cost	£150
Estimated cost of teacher time in overseeing the work	£800

Case Study 2

SECONDARY SCHOOL, LONDON

Site and School description

This Secondary school in London has 1170 pupils and occupies two sites situated 1.5 miles apart. These cover a total area of 8.17 hectares including:

- Sports pitches - grass pitches and an artificial pitch for all weather use;
- Formal garden areas including perennial flower borders, shrub beds and ornamental garden plots;
- Tubs which are planted out each season with colourful bedding;
- Tarmac playgrounds which are used for tennis and netball;
- Tarmac terrace areas for seating;
- Wildlife pond.

Formal curriculum use

Physical education, including orienteering, and science.

Informal use

During the winter the Astro turf pitch, tennis courts and tarmac terraces are available at lunch and breaktimes. In addition, during the summer there is access to certain areas of the playing fields.

Extracurricular use

There is after-school use of the site by the school for football, netball, athletics, cricket and hockey.

Community use

The Astro turf pitch area is let out to a hockey club and a local football club use the playing fields at one site.

Grounds maintenance group

Private contractor.

Work they do

The following routine maintenance work is carried out by the contractors: hedge cutting, shrub beds, perennial border and ornamental garden plot maintenance , clearing leaves, maintenance of the Astro turf pitch (including weekly care, re-marking of white lines), grass cutting, weed control, fertilising of sports pitches, maintenance and erection of goal posts and boxes.

In addition the contractor is able to carry out new landscape works such as planting of new shrubs or trees, erection of new fencing, laying new paving etc.

Model of organisation

Model 2A - a school-managed contract.

The school put the contract out to tender, following CCT Guidelines, and advertised in Horticulture Week. The successful tender was chosen from the response to first advertisement.

The work programme is agreed at the beginning of the year and the Headteacher authorises any additional work that is required. Any additional work will be requested via the Secretary to the Headteacher.

The contract was let initially for one year to assess the contractor and is now renewed on an annual basis.

Reasons for choosing this model

By managing the contract directly, the school is in full control of the work that is done, and knows what will be done, in advance.

The quality of grounds maintenance has improved and yet cost savings have been made.

Although based on the original DSO Specification, the contract was made site specific before being checked by a solicitor.

The successful contractor was not the cheapest but offered the best value for money and had the most favourable references. They have proved to be very helpful and flexible and they are able to cope with a wide variety of tasks. They are also able to offer technical advice about school proposals.

Costs

Annual grounds maintenance contract	£12,740 per year
Extras (extra planting etc)	£1028

Headteacher time

Maximum of 2 hours per week

Case Study 3

PRIMARY SCHOOL, SOUTHAMPTON

Site and school description

This school is an inner city, multi-ethnic Primary school with 250 pupils on roll. Between 1987 and 1993 the school undertook major site development involving parents, staff, governors and pupils as well as a range of contractors and advisors.

The grounds cover .32 hectares, including:

- A pond with dipping platform and surrounding planting, including a wildflower meadow and a small area of lawn.
- A split level hard surfaced area offering two play arenas with seating
- Separate Infant and Junior fixed play equipment set in bark chippings for safety surfacing and a play house.
- Narrow beds around the site planted with trees and shrubs.
- Children's gardens.
- Two further hard surfaced playgrounds.
- Three large painted murals.

Formal curriculum use

The site is used extensively for teaching maths, science, art, drama, outdoor writing and reading sessions, "circle time", P.E. including orienteering and story telling.

Informal use

The sandpit and play equipment are used on a rota basis with the remainder of the site being zoned by either activity or age of pupils or are designated as general meeting areas.

Extra curricular use

The whole site is used for activities such as cross country running training, cycle proficiency training and major school events such as the Summer fair.

Community Use

Parents use benches and the seating within the play arenas whilst waiting for their children.

Also on site is a community play court which is used solely by the school during school hours and is open to the community at other times.

Grounds maintenance group and the work done

Directly employed staff member - the Site Manager.

The site manager's duties include:

Grounds maintenance - seeding, planting, pruning, weeding, feeding plants and litter collection. Supervision of any grounds maintenance contractors on site carrying out work such as disinfecting the sand pit, safety checks on all outdoor play equipment, grass maintenance and weed control.

Handy-persons tasks such as minor building maintenance and improvements.

Work with groups of children as they utilise the site for learning opportunities.

The community play court is maintained by Southampton City Leisure staff.

Nature of agreement

Directly employed staff - post created in 1993.

Model of organisation

Model 2B - School employed grounds staff.

The Site Manager is employed for 10 to 12 hours per week, depending upon need, on a 52 week contract. Currently salary is based on caretakers rates of pay.

The tasks of work are identified either through termly Health and Safety Inspections or following fortnightly site tours undertaken by the Headteacher and the Site Manager. Standards of work are monitored by the Headteacher in liaison with the caretaker and the Site Manager. Work is prioritised by the Headteacher, with teaching staff directing their requests through him.

Reasons for choosing this model

- Site problems can be solved instantly.
- The school is in full control of its own environment.
- Groups of children can have additional access to the grounds when working with the Site Manager. The site is constantly in use, there is a wide variety of possible activities and there has been a decrease in anti-social behaviour.
- Substantial savings have been made by using the Site Manager to undertake minor repairs and improvement tasks when they arise. The job description used was very specific and the Site Manager's hours are designed to be flexible.

Issues

There must be commitment from, in this case, the Headteacher for the regular site tours with the Site Manager.

There can be problems disposing of unusable prunings.

Supervision of the variety of areas which is staff-intensive - 9 supervisory assistants at lunch time and 4 teachers and/or Special needs assistants are on duty at breaktimes.

In addition, mostly due to the layout of the site, there have been issues concerning the retrieval of balls which have strayed out of the community play court.

Costs

Funding for this post was obtained by deploying the site maintenance budget allocated under LMS. Funding for materials is taken from the schools maintenance budget.

Average annual cost for general grounds maintenance. (Salary and on-costs)	£2,220
Annual expenditure on weed control	£50
Estimated cost of teacher time for overseeing work (30 mins/wk)	£7 - £10

Case Study 4

PRIMARY SCHOOL, KENT

Site and school description

The school is situated in a rural corner of a private housing estate and occupies a 1.63 hectare site of which 1 hectare is amenity grass and sports pitches, .2 hectare is woodland with the remainder being the school buildings and formal garden areas. The site is enclosed on 3 sides by natural and formal hedging.

Within the building there is a quadrangle containing a pond, greenhouse and a variety of other learning resources.

Formal curriculum use

Features such as the pond and woodland are used throughout the year for a range of lessons including science, history, art. The extensive playing fields are used for P.E. The garden areas include flower and vegetable beds which are used according to the curriculum needs and seasons.

Informal curriculum use

The site provides a seasonally changing backdrop for informal use and playground markings are regularly reviewed with the most used being remarked and others giving way so that new games can be tried.

Extra curricular use

Activities include a range of sports and a Gardening club where children can experience creative gardening.

Grounds maintenance group and the work done

Directly employed staff - the Environment Officer - and a contractor.

The contractor is responsible for grass cutting on the playing fields.

The Environment Officer works flexibly to complete a variety of tasks including marking out of sports pitches and playgrounds, day-to-day site maintenance of the smaller amenity grass areas, shrub beds and formal garden areas, annual cutting of the 1 formal and 2 informal hedges that enclose the school and management of the greenhouse. In addition he works with children and teachers during formal lessons and extra curricular activities such as the Gardening Club.

Nature of agreement

Contract and a directly employed staff member

Model of organisation

Model 3 - a combination.

Details of the work programme for the contractor are agreed at the beginning of the contract.

The Headteacher, through the Governors, is directly responsible for managing the Environment Officer, ensuring all the relevant safety measures are adhered to, liaises with the Environment Officer over larger development projects and oversees the work so that the standard of the general appearance of the school site is acceptable. Governors and the Headteacher are responsible for setting the budget and agreeing the parameters of site development projects.

A programme of maintenance work is drawn up by the Headteacher to ensure the aesthetic and curriculum needs of the school are met, The Environment Officer is then responsible for the precise detail of the work itself and will liaise directly with teachers to determine their requirements.

Reasons for choosing this model

The school has been able to achieve a high profile in terms of its award winning floral displays and celebrated sports facilities. This had not been achieved cheaply or easily but has been very rewarding aesthetically, creatively, educationally and financially (in terms of patronage for the school) and has resulted in a school which is desirable and marketable. In addition, this model has offered the chance to:

- provide tailor-made support being given to teachers wishing to use the school grounds. The Environment Officer is available to help teachers and children with development projects such as creating the school pond in the quadrangle.
- give real flexibility in terms of meeting the changing curriculum and seasonal needs.
- meet the demands of the children for opportunities to become involved in growing and looking after plants.
- provide a small income through sale of additional plants raised in the greenhouse.

Issues

The initial period of negotiation and establishment of working boundaries for both the contractor and the Environment Officer could prove difficult although, by discussion and actual practice, these can be easily overcome.

It is important to leave scope for continuing site development so that the school can be flexible towards providing needs in the future.

It is important to aim to provide a safe and pleasing environment for all to work in as well as one that is attractive to visitors and the community in general.

Costs

Average annual cost for general grounds maintenance	£1,500
Staff wages	£12,300
Grass cutting contract	£800

After an initial capital expenditure of £1500 for machinery and equipment, there have been annual machinery maintenance and horticultural supply costs of approximately £400. In addition there are annual hire costs such as hedge trimming equipment.

Estimated teacher time for overseeing the work - 2 hrs/wk.

Case Study 5

PRIMARY SCHOOL, SHROPSHIRE

Site and school description

A Primary school which has flat grass fields and limited planting around the school itself extending to approximately 1 hectare. There has been a school grounds development project within the school to encourage a sense of ownership and reduce instances of thoughtless vandalism.

The school has 270 pupils, aged 4-11 years.

The site consists of:

- An area of play equipment, including a "tree house," surrounded by safety surfacing.
- An area of tarmac which incorporates a netball court and painted playground games and two other tarmac areas.
- A large shrub bed with seating for children on the paved area to the front.
- 3 raised flower beds planted with roses, herbs, heathers and Spring bulbs.
- A small paved play area which was created by parents.
- A maze, a recently established orchard, and copse planting with trees, shrubs and pathways.
- A conservation area with a pond and meadow area.
- A central courtyard within the school which contains another wildlife pond and flower beds which contain flowers that bloom during term time.
- The main playing field containing a small football pitch, 2 developing mounds and the start of an exercise track.
- The whole site is available to all children all the year round. Children have been involved in planting and maintenance aspects of the school grounds development project.

Formal curriculum use

The site is used for many formal teaching activities relating to science, geography, maths, history, art and English.

Informal curriculum use

Lunchtime games and activities are planned by two lunchtime staff members who are qualified play leaders.

Wellington boots allow access to the grass areas in wet weather and loose equipment such as hoops, balls and ropes are provided.

Grounds maintenance groups and the work done

DSO and a team of parents.

The DSO maintain the grass areas, cut hedges and are responsible for line marking of pitches.

Parents are responsible for the planting and maintenance of flower beds, the conservation area and courtyard. Teachers and pupils are also involved in these activities.

Nature of agreement

Contract with DSO and informal agreement with parents.

Model of organisation

Model 3 - a combination of client services-managed contract and directly managed volunteers.

Reasons for choosing this model

- Enables parents, teachers and pupils to be involved in an appropriate aspect of site development and maintenance. This involvement has had benefits such as raising the awareness and sense of ownership amongst the whole school community and reducing vandalism.
- Direct control of some aspects of the site, has allowed the school to implement children's ideas easily and rapidly.
- The money which was saved by using the DSO selectively has been used to progress further site development.

Issues

There is a tendency to become dependent on a small group of active parents and this could lead to difficulties when they or their children leave the school community.

There is still insufficient time found for teacher and pupil involvement and for children to progress "their plans".

There is not yet an in-built review programme which would allow existing and future children to develop and maintain a sense of ownership.

Costs

Average annual cost for general grounds maintenance

The contract cost approximately £2,000

The work carried out by parents averaged £330 per year for the last three years (including replacing the pond liner).

Case Study 6

CRAMLINGTON ORGANISATION FOR NATURE AND THE ENVIRONMENT (CONE)

Description

CONE is an active partnership between businesses, local authorities, wildlife agencies and the community with a remit to work for the benefit of nature conservation and the environment in the new town of Cramlington, Northumberland. The project was initiated by Blyth Valley Borough Council and is coordinated by the Council's Planning and Development Department. It is financed by CONE's business partners and by English Nature, through its various grant schemes. The wildlife agency partners, including English Nature, provide specialist advice on nature conservation whilst the County Council provides a link between nature conservation and education. Practical help is forthcoming from Community Volunteers.

CONE helps schools in the planning, creation and management of wildlife habitats on school grounds through providing financial and practical assistance. In addition, the CONE Community Education Officer helps schools make best curricular use of their site including the development of user-friendly management plans for those sites.

Strengths

The main strengths of this organisation are:

- Locally available advice and practical assistance from planning through development, use and maintenance of wildlife habitats in schools.
- Financial assistance - sometimes up to 100%.
- Ability to harness the support of community volunteers.
- Able to offer a degree of continuity to monitor progress, use and management of sites.

Issues

There is a temptation for schools to leave the management decisions and activities to CONE to plan and carry out. This is particularly true of larger areas of woodland or meadow.

The cost of including certain maintenance tasks into the main grounds maintenance contracts has been prohibitive. This work has been taken on by a voluntary warden - but this position is insecure.

Nature of agreement with schools

Informal agreement

Case Study 7

SOMERSET WILDLIFE TRUST

Description

The Somerset School Grounds Development Scheme is overseen by a committee consisting of representatives from Somerset Wildlife Trust, English Nature and Somerset County Council (Environment, Education and Property Services Departments). These organisations jointly support the employment of a part time School Grounds Development Officer. The Officer, Raymond Wheeler, offers advice to schools to produce clear and forward looking maintenance plans. Schools are encouraged to establish a lively School Grounds Committee, apply for grant aid from English Nature and involve every sector of the school community.

In addition, he is able to offer advice as to how they can develop their grounds according to LTL principles, use their grounds for curriculum activities and set this within the context of an overall School Environmental (or Green) Policy. Wherever possible, schools are encouraged to regard their school grounds projects as a Local Agenda 21 response.

Strengths

It is a great benefit for schools to have a single point of contact who, if unable to deal with their enquiry directly, can put them in touch with someone who can. Through one person, schools can reach a variety of expertise inside and outside the Local Authority's Education Service. This rapid response allows schools to make progress with their plans.

Issues

The establishment of self-help networks to enable peer support between schools is the current focus for this project. Where appropriate, these networks utilise existing school federations (or consortia) to put schools in touch with others in the same geographical area or with similar needs. At a County level, the development of the Somerset Environmental Education Forum (SEEF) has provided an opportunity for all providers and supporters of environmental education resources to meet, share experiences and create a county policy for environmental education. School grounds development is one aspect of this policy.

Nature of agreement

Not applicable.

Case Study 8

TOWER HAMLETS ENVIRONMENT TRUST

Description

The Tower Hamlets Environment Trust has links with school grounds through both its Education Service and its trading wing, Environment Projects Ltd.

Practical involvement comes through the grounds maintenance service offered by Environment Projects Ltd. Work includes general garden maintenance, wildlife habitat development and maintenance including advising on work grant-aided through English Nature's School Grants Scheme.

Service level agreements with schools include clauses enabling both parties to have clear avenues of redress in the event of dissatisfaction. However, within these safeguards, working practices are highly flexible. This flexibility has not yet presented any problems since staff have all the skills in ecological management and a good understanding of the requirements a school has of its grounds.

Strengths

A grounds maintenance contract is normally combined with an additional relationship with the school involving ongoing grounds development and curriculum use supported by the Environment Trust's Education Service. This greatly simplifies the task of achieving a productive and harmonious relationship between maintenance, development and education.

Issues

It is important that the flexibility within the agreement is not abused by either the school requesting a higher level of maintenance than was envisaged, or the Trust providing a lower level than the school envisaged. Agreements between schools and the Trust have run smoothly so far as they have been based upon mutual good faith and a clear understanding of what each party can expect from the agreement.

Nature of agreement

Service Level Agreement

Appendix 1

CALENDAR OF GROUNDS MAINTENANCE

ure	Inspections	January	February	March	April	May	June	July	August	September	October	November	December
FEATURES Bike stores Fences Gates Gutters and downpipes Litter bins Pergolas / pagodas/gazebo Sculpture Seats Sheds Signs Shelter Walls	Using a checklist : **Weekly** visual check for damage likely to cause a health and safety problem. **Termly** checks for signs of wear and tear likely to impair function. **Biannual** check to identify major refurbishment or replacement.	**Weekly** checks. First **biannual** survey to identify areas of rust or decay in timber, metal, stone or brick work which will need to be repaired, or replaced in the year ahead. Check all fixtures to ensure they are secure and in good condition. Identify gutters blocked by leaves etc. (e.g. water leaking or overflowing from gutters during heavy rain) and deal with the blockage. Carry out repairs if necessary.		**Weekly** check. Carry out repairs if necessary.	**Weekly** and **termly** checks. Carry out repairs if necessary.	**Weekly** check. Carry out repairs if necessary.	**Weekly** check. Carry out repairs if necessary.	**Weekly** and second **Biannual** check made at the end of term. Plan repairs and replacements, especially those to be done during holidays. Make arrangements for appropriate monitoring of such work.	**Weekly** checks once terms begin. Carry out repairs if necessary. Timber preservative treatment or repaint where necessary. If plants are growing nearby either protect from contact or ensure the product will not harm them.		**Weekly** and **termly** checks. Carry out repairs if necessary. Identify gutters blocked by leaves etc. (e.g. water leaking or overflowing from gutters during heavy rain) and deal with the blockage.	**Weekly** check. Carry out repairs if necessary.	
HARD LANDSCAPE All hard and paved areas Bridges Drainage channels, covers and gullies Footpaths Line markings - sports and play markings Playground surfaces Roadways Steps Wooden walkways	Using a checklist: **Daily** check where site is prone to excessive litter, especially glass, discarded syringes, dog faeces. **Weekly** visual check for damage likely to cause a safety problem. **Termly** checks for signs of wear and tear. **Biannual** check to identify major refurbishment or replacement.	**Daily** and **weekly** checks. Carry out repairs if necessary. Check for icy patches on main footpaths, playgrounds and roadways. First **biannual** survey to identify areas of rot or decay in timber, metal, tarmac or concrete which will need to be repaired, or replaced in the year ahead. Check for loose, uneven or cracked paving, tarmac and steps.		**Daily** and **weekly** checks. Carry out repairs if necessary Check for icy patches on main footpaths, playgrounds and roadways. Consider treatments to prevent weed germination on all hard surfaces.	**Weekly** and **termly** checks. Carry out repairs if necessary.	**Weekly** check. Carry out repairs if necessary.	**Weekly** check. Carry out repairs if necessary. Assess use of play markings and trial, then establish, any new markings during dry weather. Sports markings on hard surfacing should be clearly visible from a distance of 20m, be of uniform width and of the appropriate colour and layout.	**Weekly** check. Second **bi-annual** check made at the end of term. Plan repairs or replacements, especially those to be done during holidays. Make arrangements for appropriate monitoring of such work.	**Weekly** checks once term begins. Carry out repairs if necessary. Timber preservative treatment or repaint where necessary. If plants are growing nearby either protect from contact or ensure the product will not harm them. Sweep and remove all debris from drainage channels, drain covers and gullies. Carry out any sports or games remarking on hard paved areas.		**Daily** and **weekly** checks. Carry out repairs if necessary. Check for icy patches on main footpaths, playgrounds and roadways. Sweep up fallen leaves regularly and use for composting if possible. Check drains to ensure they do not become blocked by leaves.	**Daily** and **weekly** checks. Carry out repairs if necessary. Check for icy patches on main footpaths, playgrounds and roadways.	
PLAY FACILITIES Fixed play equipment Playhouses Safety surfacing Sand pits	**Daily** visual check for any health and safety problems. Regular loosening of play grade bark chippings (weekly or fortnightly depending on level of use). **Termly** check (or more frequent if feature is subject to heavy use) to identify wear and tear and to check all fixtures to ensure they are secure and in good condition. **Annual** certified inspection.	**Daily** checks if facilities are in use. **Annual** (preferably biannual) certified inspection of all fixed play equipment. This inspection will include checks to identify areas of rust or decay in timber or metal work that will need to be repaired, or replaced in the year ahead. All fixtures must be checked to ensure they are secure and in good condition. Carry out repairs when necessary.		**Daily** check. Carry out any repairs necessary. Check for signs of impeded drainage where bark chippings are used for safety surfacing. Carry out remedial works as required.	**Daily** and **termly** checks. Carry out repairs if necessary. Loosening of bark chippings as required. Topping up with play grade bark chippings as required to maintain correct depth for impact absorbency. Check sand pits for depth and clearliness of sand. Disinfect, top up or replace sand as required.	**Daily** check. Carry out repairs if necessary. Loosening of bark chippings as required.	**Daily** check. Carry out repairs if necessary. Loosening of bark chippings as required.	**Daily** checks and then **termly** / second **biannual** check to be made at the end of term. Plan repairs and replacements, especially those to be done during holidays. Make arrangements for appropriate monitoring of such work. Loosening of bark chippings as required.	**Daily** checks once term begin. Carry out repairs if necessary. Timber preservative treatment or repainting of timber or metal where necessary. If plants are growing nearby either protect from contact or ensure the product will not harm them. Loosening of bark chippings as required.		**Daily** checks and **termly** check. Carry out repairs if necessary. Loosening of bark chippings as required.	**Daily** checks if facilities are in use. Carry out repairs if necessary. Loosening of bark chippings as required.	

...re	Inspections	January	February	March	April	May	June	July	August	September	October	November	December
...APE Climbing Plants	**Termly** visual check for damage to either the plant or the support on which the plant is growing. **Annual** inspection to ensure supports and ties are secure.	**Annual** check of supports (trellis,wires etc.) and ties, adjust and remove as necessary. Plant deciduous climbers but avoid doing so when ground is frozen. Prune to remove dead and diseased branches.			**Termly** check. Plant evergreen climbers. Lay or top up mulch once soil has warmed up, is weed free and is thoroughly damp.	In dry weather water all newly planted climbers **twice weekly** giving young plants 1 bucketful of water each time. Tie in all new growth regularly.					**Termly** check. Cut out dead wood and straggly growth, especially where this is covering windows. Make sure all plants are well attached to their supports and that the supports are firm. Plant new evergreen climbers.	Plant deciduous climbers but avoid doing so when ground is frozen.	
SOFT LANDSCAPE Containers and Pots	**Weekly** checks for damage to plants and pots when in use. **Annual** inspection to ensure containers and pots are in good repair.	**Annual** check of all empty pots. Repair, repaint or treat with preservative if needed. In exceptionally cold weather bring containers of hardy plants into unheated buildings at night or wrap them with straw or other insulating material to protect the roots from frost.			**Weekly** check. Containers moved to sheltered spots last Autumn can now be returned to their original positions. Water plants regularly during dry weather.	**Weekly** check. Pot up bedding plants and prepare them by hardening off. Prepare containers and pots with new compost. Plant out into tubs or move tubs into final position once all danger of frost is past. Water plants 2 - 3 times a **week** during dry weather.	**Weekly** check. Once Spring flowering plants and bulbs are finished, allow vegetation to die back and remove for storage (bulbs) or composting (plants). Replant with late summer or autumn bedding plants. Feed regularly using a proprietary plant food designed for container or potted plants. Ensure pots are kept thoroughly moist, water 2 - 3 times a **week**. If possible used rainwater redirected from roofs and stored in secure rainwater butts.		**Weekly** check. Continue to water if necessary. Clear out summer bedding and replant with plants or Spring bulbs in new compost. Store containers that will not be used for Spring flowering plants.		**Weekly** check. Move containers in exposed positions to a site sheltered from the worst of winter winds and frosts.
SOFT LANDSCAPE Growing Plots	**Weekly** maintenance when in use.	Check over-wintering plants are firmly in the soil and have not been loosened by frost. Seeds can be planted when appropriate and as instructed on the packet.			**Weekly** maintenance. Cultivate soil prior to planting and add fertiliser if needed. If used, lay or top up mulch once soil has warmed up, is weed free and thoroughly damp.	**Weekly** maintenance. Plant out new plants. Remove weeds. In dry weather water all new plants until established.	**Weekly** maintenance. Collect and store seed when ripe and dry. Remove weeds. In dry weather, water all new plants until established.	**Weekly** maintenance. Collect and store seed when ripe and dry. In dry weather, water all new plants until established.		Remove all annual plants once they have finished flowering or producing fruit or vegetables. Tidy up over-wintering plants. Plant out plants that will over-winter. Remove all weeds and only use for compost if you are confident that the weed seed will not survive the temperature within your compost heap or bin. Dig over the growing plot and incorporate fertiliser if needed.	Plan planting for next year!

Feature	Inspections	January	February	March	April	May	June	July	August	September	October	November	December
SOFT LANDSCAPE Rose beds	**Weekly** check for litter. **Termly** visual check for damage. **Annual** inspection to plan any new planting, filling of gaps and topping up of mulch.	**Weekly** and termly checks.		**Weekly** check.	**Weekly** check . Spring prune roses. Apply a dressing of fertiliser and then fork beds lightly if not mulched. Lay or top up mulch once soil has warmed up, is weed free and thoroughly damp. Effective mulching can reduce the need for watering and weeding. Check supports of standard roses.	**Weekly** check. Remove any weeds. In dry weather water all new plants **weekly**. **Annual** inspection to identify failing plants, gaps, effectiveness of mulch for weed control, need for more mulch etc.				**Weekly** check. **Termly** check for damage. Plant new stock. Prune back roses as appropriate to approximately one third, to reduce wind blow. Remove all briar and sucker growth. Apply a dressing of fertiliser and then fork beds lightly if not mulched.		**Weekly** check. Check all climbing / rambling roses to ensure they are tied in to prevent damage by wind and snow.	
SOFT LANDSCAPE Shrub beds and Groundcover	**Weekly** check for litter. **Termly** visual check for damage. **Annual** inspection to plan any new planting, filling of gaps and topping up of mulch until plants provide sufficient cover to control weeds.	**Weekly** and **termly** checks. Plant new deciduous shrubs but avoid doing so if ground is frozen. Check newly planted shrubs for frost heave and re-firm as necessary. After heavy snowfalls, brush off snow gently from evergreen shrubs which are being badly bent by its weight. Complete light forking over of all beds that have not been mulched for weed control, to relieve compaction. Prune Winter flowering shrubs once flowering is complete.			**Weekly** and **termly** checks. Remove weeds. Lay or top up mulch once soil has warmed up, is weed free and thoroughly damp. Effective mulching can reduce the need for watering and weeding. Plant new evergreen shrubs. Prune to remove dead, diseased and crossing branches. Pot rooted cuttings from shrubs.	**Weekly** check. Remove weeds. In dry weather water all newly planted shrubs **weekly** giving young plants 1 bucketful of water. If there is a drought, watering may also be needed in 2nd and 3rd years after planting. Lightly prune Spring flowering shrubs once flowering is finished.		**Weekly** check. **Annual** inspection to identify failing plants, gaps, effectiveness of mulch for weed control, need for more mulch etc. Remove any weeds. Continue to water new plants if needed. Take cuttings from semi-mature stems and pot into a suitable growing medium.	**Weekly** check. Plant out cuttings rooted last year. Plant new evergreen shrubs from the middle of the month. Remove any weeds. Lightly prune evergreen and ground cover shrubs in an appropriate manner if needed to prevent interfering with footpaths, windows etc.	**Weekly** and **termly** checks. Complete planting of new evergreen shrubs. Take hard wood cuttings and line out in a trench over winter. Prune Summer and Autumn flowering shrubs once flowering is finished. Prune deciduous shrubs if needed to prevent interfering with footpaths, windows etc. **Annual** half moon edging of all grass edging to shrub beds.	**Weekly** check. Lightly fork over beds that have not been mulched to relieve compaction. Complete half moon edging of all grass edges to shrub beds. Plant new deciduous shrubs but avoid doing so when ground is frozen.	

ature	Inspections	January	February	March	April	May	June	July	August	September	October	November	December
SCAPE Spring bulbs	**Annual** inspection to plan any new planting.			**Annual** inspection to plan any new planting. Allow foliage to die back before removing. For bulbs, such as daffodils, naturalised in grass this is likely to be approximately 6 weeks after flowering has finished.							Plant out new stock.		
GRASS AREAS Fine lawn (where clippings are removed immediately)	**Weekly** or **monthly** check for litter, depending on level of littering on site.	**Weekly** check Service mowers and other machinery and tools in readiness for the new growing season. Avoid walking on grass when frozen or very wet.			**Weekly** check. Mow established lawns **fortnightly** or as specified once growth begins. Lightly roll Autumn-sown lawns then cut to agreed specification (usually 50mm once growth attains 60mm in height).	**Weekly** check. Mow **weekly** or as specified. Water new lawns twice **weekly** in dry weather.		**Weekly** check. Mow **weekly** or as specified. Water new lawns twice **weekly** in dry weather.		**Weekly** check. Mow **weekly** or as specified. Resow worn or bare patches and sow new lawns. Rake out dead grass to prevent thatch forming.	**Weekly** check. Mow **weekly** or as specified until growth stops. Rake off fallen leaves.	**Weekly** check. Rake off fallen leaves. Avoid walking on grass when frozen or very wet.	
GRASS AREAS Lawns and amenity grass areas (clippings are not removed)	**Weekly** or **monthly** check for litter, depending on level of littering on site.	**Weekly** check Service mowers and other machinery and tools in readiness for the new growing season. Avoid walking on grass when frozen or very wet.			**Weekly** check. Mow established lawns **fortnightly** or as specified once growth begins. Lightly roll Autumn-sown lawns then cut to agreed specification (usually 50mm once growth attains 60mm in height).	Do not cut areas of naturalised Spring bulbs until bulb leaves have turned yellow and died down. **Weekly** check. Mow **fortnightly** or as specified. For flowery grass areas, stop cutting for several weeks to allow daisies, clover etc. to flower.	**Weekly** check. Mow **fortnightly** or as specified. Water new grass areas **fortnightly** in dry weather.	**Weekly** check. Mow **fortnightly** or as specified. Water new grass areas **fortnightly** in dry weather.		**Weekly** check. Mow **fortnightly** or as specified. Resow worn or bare patches and sow new lawns. Rake out dead grass and thatch.		**Weekly** check. Mow for the last time around mid-month. Rake off fallen leaves. Avoid walking on grass when frozen or very wet.	Rake off fallen leaves. Avoid walking on grass when frozen or very wet.

ure	Inspections	January	February	March	April	May	June	July	August	September	October	November	December
GRASS AREAS Sports pitches		See SPORTS FACILITIES - Winter and Summer Sports											
GRASS AREAS Rough grass	**Weekly** or **termly** check for litter depending on likelihood of littering on site.				Remove noxious weeds manually or through spot treatment with an appropriate chemical or super-heated water. Thistles, docks and ragwort should be treated in this way. In addition, on school grounds it is advisable to treat hogweed.		If there is a high risk of fire on site, cut to a height of 100mm.				To prevent invasion by brambles and trees cut to a height of 100mm.		
WILDLIFE HABITAT AREAS Ponds and Bog Gardens	**Weekly** or **monthly** check for litter, depending on level of littering on site. **Weekly** checks on water level in Summer. **Monthly** check on overflows and their silt traps.	**Weekly** or **monthly** check for litter, depending on level of littering on site. **Monthly** check on overflows and their silt traps. Prevent ice from forming as a solid cover on ponds, for example, by using a floating ball.			**Weekly** or **monthly** check for litter. **Monthly** check on overflows and their silt traps. Introduce new plants, taking care to avoid disturbing wildlife as much as possible.		**Weekly** or **monthly** check for litter. **Weekly** checks on water level in Summer. Top up ponds and keep bog gardens moist . Use collected rainwater if this is available and is free of pollution. If only tap water is available, leave to stand for at least 24 hours before using. **Monthly** check on overflows and their silt traps. Remove algae if it threatens to cover the pond, seek a remedy for future control. Divide and move existing plants in Autumn, taking care to avoid distubing wildlife as much as possible.				**Weekly** or monthly check for litter. **Monthly** check on overflows and their silt traps. Cut and remove summer growth as it dies back. Use a 2 to 5 year cycle so that only part of the pond is disturbed each year. Protect pond from falling leaves or remove regularly.		**Weekly** or **monthly** check for litter. **Monthly** check on overflows and their silt traps. Prevent ice from forming as a solid cover on ponds.
WILDLIFE HABITAT AREAS Wildflower meadows	**Weekly** or **monthly** check for litter, depending on level of littering on site.			**Weekly** or **monthly** check for litter. Sow wildflower seeds in pots for planting out later in the year. Bring indoors seeds sown in Autumn and left outside to stratify.	**Weekly** or **monthly** check for litter. Roll Autumn sown meadows with a light roller. When growth reaches 80mm on new meadows, cut back to 50mm and remove cuttings. Mow established summer meadows **fortnightly** or as specified.	**Weekly** or **monthly** check for litter. Mow Autumn-sown and summer flowering meadows when growth reaches 80mm, cut to a height of 50mm. Remove cuttings. Move seed trays outdoors but protect from slugs and keep watered.	**Weekly** or **monthly** check for litter. Continue to mow all new meadows. Stop cutting Summer flowering meadows. Once Spring meadows are finished flow-ering, cut back to between 50 and 80mm. Leave cuttings to dry then rake off and remove. Leave some areas unmown each year for pupating insects and feeding caterpillars.	**Weekly** or **monthly** check for litter. Continue to mow all new meadows. Spring flowering meadows can be cut regularly, if desired, or left to be cut at the same time as Summer flowering meadows. When meadows are cut, always remove cuttings after allowing cuttings to dry and seeds to disperse.	**Weekly** or **monthly** check for litter. Cut Summer flowering meadows to between 50 and 80mm. Leave cuttings to dry then rake off and remove. Leave some areas unmown each year for pupating insects and feeding caterpillars. Plant out wildflowers grown from seed.	Sow new meadows.		

re	Inspections	January	February	March	April	May	June	July	August	September	October	November	December
	Weekly or **monthly** check for litter, depending on level of littering on site. **Termly** check for damage and gaps in hedges on sites which are prone to vandalism and where security may be affected. **Annual** inspection of all hedges to identify any replacement planting required.	**Weekly** or **monthly** check for litter. **Termly** check for damage and gaps in hedges, especially those that may affect security. Plant up new deciduous hedgerows and gaps in existing hedgerows.Cut new plants back after planting. Check new plantings regularly for frost-heave and re-firm if necessary. Trim natural / wildlife hedges when there is no danger of frost.		**Weekly** or **monthly** check for litter. Complete planting of new deciduous hedgerow species. Continue to check for frost heave.	**Weekly** or **monthly** check for litter. **Termly** check for damage and gaps in hedges. Plant up new evergreen hedgerows and gaps in existing hedgerows. Lay or top up weed controlling mulch at the base of new hedges during the first 3 years. Mulch should be laid when soil is warmed up, weed free and thoroughly moist.	**Weekly** or **monthly** check for litter. Keep the bases of new hedges weed free for the first 3 years after planting. In dry weather water new hedges **weekly**, giving a bucketful per plant. If there is a drought it may be necessary to water in the 2nd and 3rd years after planting.		Identify and mark any young trees in the hedgerow that are to be allowed to grow on into trees. Use brightly coloured tags for easy identification. Trim flowering hedges lightly after flowering. Trim other hedges, except for those grown for wildlife value.	**Weekly** or **monthly** check for litter. **Termly** check for damage. **Annual** inspection of all hedges to identify any that will require replacement or have gaps that require filling. Order replacements. Continue to water if necessary.	**Weekly** or **monthly** check for litter. Prepare new trenches for planting new hedges. Plant new evergreen hedges and plant up gaps in existing evergreen hedges.	**Weekly** or **monthly** check for litter. Plant new deciduous hedges and fill gaps in existing deciduous hedges. Check new plants for frost heave and re-firm if necessary. Clear out ditches beside hedgerows and cut back ditch vegetation. Wildlife hedges can be trimmed back in accordance with a specification to increase their wildlife value
TREES **Individual and specimen trees**	**Termly** check for damage if site is prone to vandalism of trees. **Biannual** check of the condition of support ties and stakes. **Annual** check to identify any replacement planting required. **Annual** check of all large and mature trees for disease and decay. For large and old trees and trees overhanging paths and roadways it is advisable to seek professional advice in the first instance. Some Local Authorities have retained this role centrally.	**Termly** check for damage if site is prone to vandalism of trees. First **biannual** check of all supporting stakes and ties. Reduce height, replace if necessary and programme their removal as trees become established (normally by the 5th year at latest). **Annual** check of all mature trees to identify any signs of decay. Plant up new deciduous specimen trees but not when ground is frozen. Check new plantings regularly for frost-heave and re-firm if necessary. Inspect and remove broken, damaged or crossing branches, arrange for any other tree works to be done.		Complete planting of new deciduous species. Continue to check for frost heave. Lay or top up weed controlling mulch at the base of new specimen trees during the first 3 years. Wait until soil has warmed up, is moist and weed free before mulching an area of approximately 1 square metre per tree.		**Termly** check for damage or signs of ill-health. A second **biannual** check of all supporting stakes and ties. In dry weather water new trees **weekly**, giving 3 bucketfuls per tree. If there is a drought it may be necessary to water in the 2nd and 3rd years after planting. Keep the bases of new trees weed free for the first 3 years after planting.		**Termly** check if required. **Annual** check of all plants to identify any that will require replacement. Order replacements. Continue to water if necessary. Plant new specimen evergreen trees.		Plant new deciduous trees. Remove sucker growth from large trees. Check new plants for frost heave and re-firm if necessary.

Feature	Inspections	January	February	March	April	May	June	July	August	September	October	November	December
TREES Established woodlands	**Weekly** or **monthly** check for litter, depending on level of littering on site. **Termly** check for damage if site is prone to vandalism of trees. **Annual** inspection for disease or decay. For very large and mature trees and trees overhanging paths and roadways it is advisable to seek professional advice in the first instance. Some Local Authorities have retained this role centrally. **Annual** check to identify any replacement planting required.	**Weekly** or **monthly** check for litter. Plant new native trees as whips or transplants in clearings, but not when ground is frozen. Check new plantings regularly for frost-heave and re-firm if necessary. Inspect and remove broken or damaged branches. Clear unwanted scrub and remove sycamore seedlings to stop them becoming invasive. Put up new nesting boxes and clean out existing boxes before nesting begins. **Annual** check of all mature trees for signs of disease or decay.		**Weekly** or **monthly** check for litter. Complete planting of deciduous species. Continue to check for frost heave and re-firm if necessary.	**Weekly** or **monthly** check for litter. **Termly** check for damage if site is prone to vandalism of trees.	**Weekly** or **monthly** check for litter.			**Weekly** or **monthly** check for litter. Take semi-hard wood cuttings of dogwood, holly, ivy, honeysuckle and viburnum to grow on.	**Weekly** or **monthly** check for litter. **Annual** check of all plants to identify any that will require replacement. Order replacements. If areas of woodland are to be coppiced, every 5th-7th year select and mark trees in rotation for coppicing.	**Weekly** or **monthly** check for litter. **Termly** check for damage if site is prone to vandalism of trees. Collect seed for sowing. Take hardwood cuttings from willow, hazel, wild roses, privet and yew *(parts of the last two plants are poisonous).* Plant new and replacement evergreen trees.	**Weekly** or **monthly** check for litter. Only work when there is no frost and the ground is not frozen. Introduce new native species to increase diversity within the wood by planting trees as whips or transplants in clearings. Cut back trees selected for coppicing. Check new plants for frost heave and re-firm if necessary. Thin out some young trees when branches are touching by removal or cutting back. Leave others to develop as thickets.	
TREES New woodlands	**Weekly** or **monthly** check for litter, depending on level of littering on site. **Termly** check for damage if site is prone to vandalism of trees. **Annual** inspection to identify any replacement planting required.	**Weekly** or **monthly** check for litter. Plant new and replacement native trees as whips or transplants but not when ground is frozen. Check new plantings regularly for frost-heave and re-firm if necessary. Inspect and remove broken, damaged or crossing branches. Thin out young trees when branches are touching by removing some, cutting back some and leaving others.			**Weekly** or **monthly** check for litter. **Termly** check for damage if site is prone to vandalism of trees.	**Weekly** or **monthly** check for litter. Keep the bases of new trees weed free for the first 3 years after planting. In dry weather water new trees **weekly**, giving a bucketful per plant. If there is a drought it may be necessary to water in the 2nd and 3rd years after planting.			**Weekly** or **monthly** check for litter. **Annual** check of all plants to identify any that will require replacement. Order replacements. Keep the bases of new trees weed free for the first 3 years after planting. Continue watering if necessary.	**Weekly** or **monthly** check for litter. **Termly** check for damage if site is prone to vandalism of trees. Plant new and replacement evergreen trees.	**Weekly** or **monthly** check for litter. Only work when there is no frost and the ground is not frozen. Plant new and replacement trees. Thin out young trees when branches are touching by removing some, cutting back some and leaving others. Check new plants for frost heave and re-firm if necessary.	

ure	Inspections	January	February	March	April	May	June	July	August	September	October	November	December
'IES Winter Sports	**Weekly** checks on goal posts and boxes to ensure they are secure. Start of **term** inspection to ensure layout of pitches, width and visibility of markings meet the specification. Start of **season** inspection to ensure pitch areas are free of hazards such as holes, protruding stones etc. End of **season** check to plan renovations and repairs.	**Weekly** checks on goal posts and boxes to ensure they are upright and secure. Start of **term** inspection. Mark out all pitches for the first day of **term**. Maintain line markings at 30m visibility. Maintain grass in all pitch areas to specified height. Hand mow hockey pitches, if required, to meet specification. Spike winter pitches, when conditions permit, to the agreed specification, so as to assist aeration and drainage. Identify any areas of poor drainage and deal with when conditions permit.			End of **season** check to plan renovations and repairs. Apply Spring fertiliser if specified - this may not be necessary every year, e.g. once every 3 years.			Check renovations and repairs to pitch areas have been successful.	Start of **season** inspection to ensure pitch areas are free of hazards such as holes, protruding stones etc. Erect goal posts and boxes. Ensure lines are marked out for the first day of **term**.	**Weekly** checks on goal posts and boxes to ensure they are upright and secure. Allow grass to grow to specified height for football (usually between 40 and 75mm) and rugby (usually between 75 and 100mm). Maintain at specified height during the playing season. Maintain hockey pitches to specified height (usually 20 - 25mm). Apply Autumn fertiliser if specified - this may not be necessary every year e.g.once every 3 years and not if pitch has been Spring fertilised that year.	**Weekly** checks on goal posts and boxes to ensure they are upright and secure. Maintain all markings at 30m visibility. Maintain grass in pitch areas to specified height. Spike winter pitches, when conditions permit, to the agreed Specification. Identify any areas of poor drainage and deal with when conditions permit. Roll hockey pitches if required and if conditions permit.		
					End of Winter **season** check to plan renovations and repairs. Once Winter sports season has ended, dismantle and remove goal posts and plug the post boxes. Repair posts and goal boxes of necessary. Repaint when necessary - usually every 1 to 2 years. Store goal posts in a secure manner for the Summer. Spike, harrow, fertilise and over seed worn areas on pitches during appropriate conditions. Lightly roll pitches after harrowing, when soil conditions are suitable. When weather is suitable, carry out renovation works to goal mouth areas to ensure healthy grass growth and a level surface for next season. Apply selective herbicides to pitch areas, if required.							

Feature	Inspections	January	February	March	April	May	June	July	August	September	October	November	December
SPORT FACILITIES Summer sports	**Monthly** check to ensure all practice nets and cages are secure. Start of **term** inspection to ensure layout of athletic tracks and other markings, and the width and visibility of markings meet the specification. Start of **season** inspection to ensure running surfaces are free of hazards such as holes, protruding stones etc. End of **season** check to plan renovations and repairs.	Cut cricket squares and grass tennis courts when conditions permit to the agreed specification.		Spike, roll, scarify and fertilise cricket squares when conditions are suitable. Prepare artificial wickets with thorough brushing and repair any uneven areas. Carry out repair and renewal works to run-up areas (surface and edges) for athletic sports such as long, triple and high jump. Renew or top up sand in jumping pits. Remove all weeds from jumping pits and run-up areas. Inspect surface areas of throwing circles / pads. Apply Spring fertiliser if specified.	Start of **term** inspection. Start of **season** inspection to ensure running surfaces are free of hazards such as holes, protruding stones etc. Erect tennis nets and cricket practice nets in time for the first day of term. Erect temporary throwing cages. Check that permanently sited cages are secure. Apply a selective herbicide, if required, to cricket squares.				End of **season** check to plan renovations and repairs. Repair damage to cricket wickets and carry out cricket square renovation. Apply additional loam to square if necessary. Mark off and protect cricket squares during winter season. Remove and repair tennis nets and practice cricket nets. Dismantle throwing cages if necessary. Cap off post holes during winter season.		Cut cricket squares when conditions permit in accordance with the specification.	
				Monthly check to ensure all practice nets and cages are secure. Prepare and mark out and repair after use all cricket wickets as required. Scarify cricket squares as required. Apply fungicide to cricket squares if required. Maintain all line markings at 30m visibility. Maintain grass area as specified (usually at a height of approximately 25 - 30mm for athletics, 6 - 15mm, depending of level of performance required, and all clippings boxed off for cricket squares). Remove weeds from jumping pits and run-up areas. Maintain run-up surfaces - see All weather surfaces.									

ure	Inspections	January	February	March	April	May	June	July	August	September	October	November	December
CIAL ES Artificial surfaces (e.g. artificial grass)	**Weekly** or **monthly** check to identify areas of damage. Repair as soon as possible. Brush regularly and remove litter, leaves, soil and any other debris. Remove any plants that manage to establish. Line mark with an appropriate marker to the agreed specification. **Annual** inspection and repair of any areas of undulation. *Artificial surfaces require specialist installation and maintenance requirements are described by the suppliers.* *The above summary should therefore be seen as a guide only* *and schools should seek expert advice about the detailed maintenance of these areas* *if they are to provide the amount and quality of play that is required of them.*												
ALL-WEATHER / HARD POROUS SURFACES All-weather or hard porous surfaces (e.g. Redgra, Notts Gold, grit or cinder etc.)	Rake, level, brush and roll **weekly** or as specified, when conditions are suitable and using appropriate machinery, to maintain a hard, level and true surface. This may be less frequent when the area is out of use for part of the year e.g. athletic run-ups. All-weather surfaces should be kept weed free. Leaves and other debris should be removed promptly to prevent integration with the surface. Apply top dressing as specified to reinstate hollows. Major remedial or renovation works, including scarification, may be needed from time to time and should be instructed and overseen by someone with appropriate knowledge. Avoid using or maintaining these areas during extremes of weather. *All-weather surfaces require specialist installation and maintenance requirements are described by the suppliers.* *The above summary should therefore be seen as a guide only and schools should seek expert advice about the detailed maintenance of these areas* *if they are to provide the amount and quality of play that is required of them.*												

Appendix 2

GLOSSARY OF TERMS

Glossary - General

CCT
Compulsory Competitive Tender

Contract
1 An agreement between two parties. One party provides goods or services to the other in return for payment.

2 Standard form of contract - a pre–printed set of legal clauses which are suitable for use on the work in question.

DSO
Direct Services Organisation - the Local Authority directly employed workforce responsible for grounds maintenance. Also referred to as DLO - Direct Labour Organisation.

Extra-curricular
Learning opportunities organised at lunchtimes and after school, such as sports, gardening or conservation clubs

Formal Curriculum
That which is taught in formal lessons and follows the national curricula guidelines

Hidden Curriculum
The messages and meanings conveyed by the way school grounds are designed, used and managed

Informal Curriculum
That which is learned informally during play and break times

LEA
Local Education Authority

LMS
Local financial management of schools as a result of the Education Act 1988

School community
Taken as the whole school community, including all staff (teaching and non-teaching), pupils, parents and Governors, neighbours and the wider community in which the school is located.

The following definitions are of terms that are commonly used with respect to contract documents.

Bills of Quantities, Measured Works or Site Data Sheets
A document which comprises a number of sections and deals with the amount (Quantity) of work required, the quality of that work (as described in the Specification), the rules for carrying out that work (as described in the Preliminaries) and a section to include Contingencies, rates for Dayworks and other Provisional Sums. The descriptions will be no more than brief abstracts of the Specification items, and the two sections need to be read together to obtain a correct picture of both the quality and quantity of each item.

Bills of Quantities should provide a clear and unambiguous reference to the item which is being quantified – for example, "cut grass" may be unclear if there are a variety of different types of grass cutting in the Specification. They should also include a clear quantity to be treated each time the operation will be carried out and/or or a clear number of operations. The Contractor should be given enough space to insert rates per operation or per unit and a total per annum cost against each item. The format may be one of columns so as to allow the Contractor to see and price each item easily.

Certificate
A direction from the Supervising Officer to the Client, stating the amount of money which is due to the Contractor for works which have been properly executed.

Client
The employer – the person or organisation who pays the money.

Contingencies
Money included in the Contract Sum to cover unforeseen circumstances, to save going back to the Client for approval of any minor costs. If not spent, they are not paid to the Contractor.

Contract documents
The paperwork which encompasses all aspects of the legal agreement. This always includes the Form of Contract, and is usually accompanied by the Specifications, Bills of Quantities and the Site Plan.

Contract Site Plans or Drawings
Those site plans used in the preparation of the Contract documents.

Contractor
The person or firm which supplies the goods or services.

Dayworks
This is a method of valuing works on a time and materials basis, when it is impossible to accurately quantify or identify the works. It may be referred to as "Time and Materials", which refers to the way the payment is calculated. This method is only used with caution and as a last resort – the Contractor having no motivation to finish the works quickly, and so keep costs down. The demand on supervision time is also heavy.

The Contractor is paid for the amount of labour s/he puts into the work, based on an hourly rate for each grade of operative. Likewise, s/he is paid for the amount of machinery s/he uses based on the time it is used for. Materials are paid for as required and prices are only likely to be included if they are regularly used, for example top dressing for grass cricket squares, herbicides or bark mulch.

General Conditions
These introduce the work and lay down the rules under which the works will be carried out. It tells the contractor which form of contract will be used, which clauses will be amended and how, and runs through such matters as keeping the site clean, access onto site, providing water for the works, site huts and accommodation etc. The way in which a Contractor is allowed to carry out the works will directly affect the price for the works and therefore these items need to be clearly explained.

Landscape Manager

This title may be used to describe the Supervising Officer for the contract. Depending on their skills they may monitor the work on the ground, provide technical advice to the client as to the quality aspects of the services, be responsible for issuing instructions and certificates, authorising payment etc. If schools wish to appoint such a person they will need to ensure they are capable of managing grounds maintenance work and not just new landscape creation work. Their responsibilities, conditions of employment and fees or salary need to be agreed at the outset. Depending on their qualifications they may be a member of one of a number of professional organisations e.g. Association of Landscape Managers, Landscape Institute, Institute of Groundsmanship, Institute of Leisure and Amenity Managers.

Preliminaries

Clauses which give information to the Tenderers with regard to the Parties to the Contract, the Contract clauses which will be used, the site set up which will be required, insurance details, indeed, any items which are required to ensure the proper and safe running of the contract works, but have no part of the finished works. If the Contractor chooses not to price the Preliminaries section of the Bills of Quantities (usually at the beginning) then the rates for the actual measured works themselves are deemed to include an allowance to cover these Preliminary items.

Prime Cost (PC) Sums

This section of a contract deals with specialist and unforeseen works. PC or Prime Cost Sums are for items of work normally carried out by specialist contractors. The contractor has to organise and oversee this work, so s/he is allowed to insert a percentage addition for overheads and profit, and a lump sum for attendance on any sub–contractor if one is involved. Attendance simply means providing the general facilities to enable the work to be carried out. The use of sub-contractors, and even which sub-contractors may be used, needs to be discussed fully and agreed to ensure they are acceptable to the client-the school.

Provisional Sum

An amount of money which is included in the Contract Sum for works which are, as yet, undefined. This may be because certain work which will definitely take place is as yet undesigned, or it may be because experience leads us to assume that although we cannot be sure, certain works are likely to occur during the Contract Period (eg work on trees) the extent or nature of the works is not known. Contingencies and Dayworks are the two most common Provisional Sums included in Bills of Quantities.

Schedule of Rates

Some areas of work can not be quantified at the beginning of the contract but are very likely to be required during the life of the contract. To help the client (school) identify the possible cost of this work, these aspects are listed and described, and the Contractor has to provide a costed rate for the work. More often, approximate Quantities are put against these descriptions so that when two or more Contractors price out the schedule an element of competition is introduced. Comparison of schedules of rates are notoriously difficult, as usually different Contractors are cheapest for different elements of the work.

Site map or plan

Although some grounds maintenance contracts are let without site plans or maps their inclusion is especially valuable in enabling both the school and the contractor to be clear about which areas of the site are to be maintained. They enable a contractor to price more effectively, they can be used as quick reference for the contract monitor and are also a useful tools for the school to use when planning activities on site, doing mapping or survey work or planning future developments.

Some site plans are even colour or number coded so that the type of work specified can be seen at a glance. For example light green colour or FT (Fine Turf) may be used to indicate areas where grass is to be maintained to fine turf standards (i.e. inclusion of fine grass species, low level cut, clippings removed and regular applications of fertiliser and / or herbicide when appropriate). Every shrub bed or grass area may be individually numbered so that any changes can be quickly transferred to the Bills of Quantities.

Specification

From the schools view, this is one of the most important documents as it deals with the quality and standard of the work and what is required to be done. The specifications also aim to ensure that no misunderstandings occur between client (the school) and the provider (contractor).

The clauses deal with the quality of the workmanship, the materials to be used and describes what work is to be done for each feature. Two types are commonly found:

Performance Specification

A type of specification which uses a set of clauses that specified the required results of the services provided, without giving the specific means of arriving at that result.

Frequency / Operation Specification

A type of specification which uses a set of clauses that specify the frequency or number of operations to be carried out to achieve the required result.

Standard forms of contract

Originally produced for use with new landscape works, these may be amended to take account of the specific types of work associated with grounds maintenance. These set out the general conditions of the contract such as insurance, payments, disputes etc. Examples for new works:

- JCT(Small Works) - Standard Forms of Contract issued by the Joint Contracts Tribunal
- JCLI- Form of Contract issued by the Joint Council for the Landscaping Industry
- ICE- Conditions of Contract issued by the Institution of Civil Engineers and the Federation of Civil Engineering Contractors
- General Conditions of Government Contract for Building and Civil Engineering Works issued by HMSO.
- Association for Chief Technical Officers - Conditions for Grounds Maintenance.

Appendix 3

PROFESSIONAL ORGANISATIONS AND USEFUL RESOURCES

Professional organisations

Association of Landscape Management (ALM)
10 Avondale Road, Exmouth, Devon
EX8 2NQ
Tel: 01395 275063

British Association of Landscape Industries (BALI)
Landscape House, Henry Street, Keighley,
West Yorkshire, BD21 3DR
Tel. 01535 606139

British Standards Institution (BSI)
389 Chiswick High Road, London, W4 4AL
Tel. 0171 629 9000

Health and Safety Executive
Public Enquiry Point, Information Centre,
Broad Lane, Sheffield S3 7HQ
Tel: 0114 289 2345

Institute of Leisure and Amenity Managers (ILAM)
ILAM House, Lower Basildon, Reading,
Berkshire, RG8 9NE, Tel. 01491 874059

Institute of Groundsmanship (IOG)
19-23 Church Street, The Agora, Wolverton,
Milton Keynes, Buckinghamshire,
MK12 5LG
Tel. 01908 312511

Landscape Institute (LI)
6/7 Barnard Mews, London, SW11 1QU
Tel. 0171 738 9166

Other useful organisations

British Trust for Conservation Volunteers (BTCV)
36 St. Mary's Street, Wallingford,
Oxfordshire OX10 0EU
Tel. 01491 39766

English Nature
Northminster House, Peterborough,
Cambridgeshire PE1 1UA
Tel 01733 340345

Learning through Landscapes
3rd Floor, The Law Courts, Winchester,
Hampshire SO23 9DL
Tel 01962 846258

National Playing Fields Association (NPFA)
25 Ovington Square, London, SW3 1LQ
Tel. 0171 584 6445

National Play and Information Centre (NPIC)
1st Floor, 359-361 Euston Road, London,
NW1 3AL
Tel. 0171 383 5455

The Wildlife Trusts
The Green, Witham Park, Lincoln, LN5 7JR
Tel. 01522 544400

Royal Society for the Prevention of Accidents (RoSPA)
Cannon House, Birmingham, B4 6BS,
Tel. 0121 200 2461

Tidy Britain Group
Education Manager, The Pier, Wigan,
WN3 4EY
Tel. 01942 824620

Useful resources

British Standards which relate to grounds maintenance

BS 7370 Grounds Maintenance has been prepared in order to provide guidance to those responsible for the upkeep of land that has recreational or amenity use and includes a series of recommendations for the various aspects of such maintenance.

Part 1 1991

Recommendations for establishing and managing grounds maintenance organisations and for design considerations related to maintenance.

Part 2 1994

Recommendations for the maintenance of hard surfaces (excluding sports surfaces)

Part 3 1991

Recommendations for maintenance of amenity and functional turf (other then sports turf)

Part 4 1993

Recommendations for maintenance of soft landscape (other than amenity turf).

British Standards which relate to play equipment and safety surfacing

British Standard 5696 Play Equipment Intended for Permanent Installation Outdoors

Part 1 1986, (Amendments in 1990) Methods of Test

This describes methods for testing play equipment, including tests for hand, finger, limb and head traps, clearance between swing seats, swing seat impact and limiting the speed of rotating equipment.

Part 2 1986, (Amendments in 1990) Specification for Construction and Performance

This provides specifications for construction and performance of static, rotating, rocking, swinging and combination equipment. It also includes a list of other British Standards that are relevant for some of the materials that may be used for the manufacture of play equipment.

Part 3, 1979 (Amendments in 1980 and 1990) Code of Practice for Installation and Maintenance

This provides recommendations for the inspection and maintenance of play equipment. It also includes recommendations on general site checking, layout and siting of play equipment, suitable surfacing materials and foundations, assembly and erection of equipment. It also includes recommendations for pass/fail criteria relating to safety surfacing although the actual methods for testing impact absorbing surfaces is dealt with in BS 7188

British Standard 7188 1989 Methods of test for impact absorbing playground Surfaces

This describes the methods for testing impact absorbing surfaces including impact absorbency, inflammability, durability, slip and resistance to indentation.

BTCV Handbooks (Hedging, Drystone walling, Wetlands and Waterways, Trees and Aftercare, Woodlands)

BTCV Enterprises, Tel: 01302 859522

Esso Schoolwatch - The Initial Survey

Joan Wood, Bill Lucas and Marcus Grace, 1992, LTL, Tel: 01962 846258

Flowers in the Grass: creating and managing grasslands with wildflowers

H.J. Ash, R. Bennett and R. Scott, 1992, English Nature, Tel: 01733 340345, ISBN 1 857160 39 8

From Giant Sweets to Sponge Floors

Brian Stoker and Tina Brawn, 1993, Cheshire County Council, Tel: 01244 603175

Ground Rules, planning site projects using the school grounds

Liz Court, 1994, Community Design for Gwent, Tel: 01633 250271

How to make a Wildlife Garden

Chris Baines, Elm Tree Books, ISBN 0 241 11870 0

Litter and the Law

1993, Tidy Britain Group, Tel: 01942 824620

Managing and maintaining your school grounds

The Hampshire School Landscape Group,1995, Hampshire County Council (Biblios) Tel: 01403 710971

Nature Area Management Plan

1989, Urban Wildlife Trust, Tel: 0121 666 7474

Playground Safety Guidelines

David Uzzel and Elaine Stone, 1992, National Play Information Centre, Tel: 0171 383 5455

Poisonous Plants and Fungi, An Illustrated Guide

M.R Cooper and A.W. Johnson, 1991, HMSO, Tel: 0171 873 9090, ISBN 0 112427 18 9

SNAIL Calendar, School Nature Area Maintenance Calendar

1992, Dept. of Planning and Transport, Leicestershire County Council, Tel: 01533 657332

Sports Ground Maintenance - an elementary guide

National Playing Fields Association, 1989, Tel: 0171 584 6445

The Outdoor Classroom - Building Bulletin 71

1990, HMSO, Tel: 0171 873 9090, ISBN 0 11 270730 0

The Outside Classroom Pond Guidelines

Edited by Dave Symonds, 1993, Surrey County Council, Tel: 0181 541 9427

More information about these titles can be obtained by contacting LTL, Tel: 01962 846258 or Fax: 01962 869099.

Appendix 4

CONTRACT LETTING

Definition of a Contract

A contract in its simplest form is the agreement between two parties to discharge certain obligations. One will undertake to carry out work or provide services, the other will undertake to pay for that work or those services.

Essentials for a Contract

All of the following must be addressed if a legally binding Contract is to be entered into:–

- Offer and acceptance
- Intention to create legal relationship
- Legality
- Capacity of the parties
- Payment to a person for services rendered ("consideration")

Assessing potential grounds maintenance organisations

One of the most important aspects of contract tender procedure is to assess the quality and abilities of the firms who are asked to tender. It is normal to ask prospective contractors to submit information on subjects such as:

- the financial stability of the firm
- their Health & Safety and training policies
- the names of other employers who would be prepared to give references (preferably other schools)
- their insurance arrangements.

Having taken up references and collected the other information it may still be desirable to interview the firms and in particular try to assess the abilities of the staff who will actually be managing the contract.

Types of contract letting

Contracts may be let through through negotiation with a chosen company, open tendering or selected tendering.

Negotiated contract - choosing one company and agreeing a price

In some instances, depending on the type of work, it is possible to arrange for a contract to be negotiated with one selected landscape contractor without inviting competitive prices. This usually occurs for only small projects, for example those under £5000, (this figure is set by your local authority's Financial Regulations and Standing Orders and may vary between authorities) and generally on schemes where a contractor is selected on the basis of other work he has undertaken of a similar nature. As with select tendering, the local education authority may use a selected list of companies and schools should ascertain how this will affect their choice of contractor. Bills of Quantities and a Specification are advisable when negotiating so that pricing is based on accurate information and a simple and effective method is obtained for checking the work and managing the contract.

Tendered contract

The main aim is to receive completed tenders for the work from tenderers (companies competent to carry out school grounds maintenance work) who have all competed on an equal basis because they have all had access to the same information to enable them to put in their tender for the work. If a school plans to let a contract themselves under this process there are set procedures that need to be followed. This is a complex legal process and schools are advised to seek expert advice and assistance so as to avoid costly errors due to lack of clarity or understanding or the possibility of collusion between tenderers to fix a price.

Open Tendering – inviting firms to apply by advertising in the local press.

If schools are to use this method they need to be able to scrutinise all of the applicants in order to ensure they get value for money and safe and high quality of work on site. In addition to the aspects mentioned above, schools will need to check their membership of a professional or trade organisation, such as BALI, and that the size and value of work are appropriate for the size and working practices of the contractor.

Select Tendering – choosing the suitably qualified firms you want to tender.

Normally between 4 and 6 contractors are chosen to form a select list. Many local authorities already use a select list of firms whom they have investigated and found to be competent at the time of investigation.

Documentation and Process for letting a contract by tender

The minimum standard documentation will be:–

- Preliminary enquiry letter - this will ask the prospective tenderers to state their willingness to tender and give some basic information on the work
- Letter of invitation - this will tell the Tenderers what should be included in the tender package, and give details of return dates, time and location, etc.
- Contract documents - Preliminaries, Specification, Site Plan, Bill(s) of Quantities.
- General Conditions - these describe unambiguously the contract's terms and conditions
- Confirmation of amendment letter- a letter to confirm any amendments made to the documents during the tender period. This should give all tenderers sufficient time to update their documents before return
- Tender report - this gives details of all the tenders and concludes with a recommendation about the successful tender
- Letter of regret - to the unsuccessful tenderers, giving details of the firms tendering in alphabetical order, and the tendered figures in ascending order of money
- Letter of award/acceptance - to the winning contractor, accepting the tender and confirming the sum
- Pre-Contract meeting agenda - this is a important meeting which occurs immediately prior to the contract commencing. Its purpose is to clarify the final working details of the contract and is an opportunity for the school to meet the contractor personally if this has not happened already (see below)
- Valuation and Certificate forms - to certify that work has been done and that the contractor can be paid
- Variation forms - in the event of changes to the contract being necessary.

Monitoring the contract

Meeting with Contractors

It is usual after the contract has been awarded that a meeting is held between the contractor, the client (the Head teacher) and the supervising person – be it the schools agent (Client Services Officer or a consultant) or a school staff member, to agree the precise details such as:

- Confirmation of commencement and completion dates, contract sum and administrative matters such as valuations, variations, access arrangements followed by inspection of the site together
- Access arrangements
- Accommodation for any equipment
- Health and Safety matters
- Times for working
- Contact name and telephone number of a link person for both the contractor and the

school before any work commences on site.

It is also very important that a detailed programme of works is produced by the contractor as this will allow the school to know what work will be undertaken, and when, along with the number of staff and types of machinery that will be used. Although this information is important, the school must remember that inclement weather may affect the timing of some operations.

The meeting should be conducted in a professional manner and it is vital that all decisions are recorded and minutes of the meeting distributed to everyone concerned. Once the contract is being implemented further meetings may be necessary depending upon the scope of work, the season and type of contract. As for the initial meeting, it is very important to confirm everything agreed verbally at meetings in writing – even if it is hand–written on site, using appropriate forms and signed by the agreed person from both the school and the contractor.

Regular inspection

It is very important that all work undertaken by a contractor is inspected on a regular basis otherwise it may lead to indifferent standards and poor quality on site. To a certain extent the inspection of other work such as that carried out by the school's own staff and/or community groups can prove to be beneficial too in highlighting issues before they become problems. Very often helpful advice at an early stage can save time, frustration and money.

The school should ensure that regular inspections of the work are undertaken and recorded, and that any failings are promptly notified to the contractor by the person allocated this role. When the contract is properly established and running smoothly, a detailed monthly inspection should be sufficient in the summer months with a lower frequency in the winter (once in six weeks). However it is most important to ensure a continuity of inspections during the Easter and Summer holidays when the key reinstatement and sports changeover work has to take place.

The method and individuals responsible for monitoring the standard of work needs to be identified from the beginning. This role can be undertaken by agents such as Client Services Units or a consultant acting on behalf of schools or by schools themselves. In reality there will be continual monitoring by the school staff as they use, or at least see, the site every day. However, correct contract monitoring will involve more than a passing glance and so schools taking on formally this role need to ensure they have adequate information, possibly training and certainly have access to contract documents to allow them to do the job efficiently. This will result in the required standards being met and school funds being spent wisely.

Payment

During the course of the job the contractor will submit accounts for payment. The contract will allow for progress payments to be made either at intervals of time, i.e. monthly or quarterly or against the value of work completed at an agreed date. Prompt payment – usually within 21 days – eases the cash flow of many contractors and does enable them to be more competitive.

As with all aspects of school management, full and proper accounts need to be kept. It should be the responsibility of a named individual to be responsible for this certifying of work completion and the necessary payment. Furthermore, regular checks should be made so that the school is aware of the expenditure of any provisional and contingency funds.

Before payment is made a school should be satisfied with the completed work. In the event of unsatisfactory or incomplete work, an amount of money (e.g.a percentage or all of the payment) may be withheld according to the procedure outlined in the contract.

When a contract is completed or is terminated the Final Account must be prepared and it must be complete in every detail, to ensure a smooth passage through any audit.

Length of a Contract

Most grounds maintenance contracts last from one to five years although contracts let in accordance with the Local Government Act 1988 must be for 3 or 4 years duration. Longer contracts give the contractor a greater confidence in making capital investments, may encourage a greater sense of commitment to the work and should result in lower prices. In practice, it will

take a new contractor at least one year to understand the special requirements of a school or site and so a three year contract is probably a sensible minimum. Even a five year contract can have a "break" clause at three years or be extended for further years, subject to satisfactory performance. However, it is usually wise to "retest the market" at about five yearly intervals in order to achieve best value for money.

Making changes to the contract - Variation Orders

It is inevitable that during the contract period some changes are required because there are changes to the site, the way it is used or the way the school wishes it to be maintained. Such variations must refer, where applicable, to the original clause number in the Bills of Quantities and appropriate rates. While the school can ask for any alteration to the documents to suit its own requirements it is essential to realise that there may be costs involved.

If variations are made which cannot be based on the unit price in the contract, a price must be obtained for the work from the contractor and approved by the client before an instruction is given to proceed with the change. This avoids disputes on prices of new items at the final account stage.

It is essential that costs of any work undertaken is approved by the school at all times. While contracts can be kept under strict control it is very often the small, inaccurately specified projects where errors and unexpected expenditure can occur. This can be exaggerated where VAT is involved, where there are different sources of funding or more than one budget source is being used. It is important that the school uses the person appointed to inspect/supervise work, uses the appropriate procedure, obtains permission through the correct channels and informs the contractor in the agreed manner. Such requests are normally referred to as Variation Orders.

Disagreements and disputes

It is, perhaps, inevitable that on every contract there will be differences of opinion, and that often these are caused by different interpretations of a contract condition, an instruction or a situation. Such differences should be easy to settle at an early stage. They can become serious at the end of the job, when it is often too late to prove the facts because of subsequent work. The supervising person should therefore take careful precautions to limit the areas in which disputes can arise, by ensuring that all agreements, instructions and decisions are recorded in writing; that all site meetings are minuted; and that all parties are given the best information available.

Contract Documents

These are described in the Glossary in Appendix 2 and in Chapter 3.

Management changes and school grounds

If changes are made in the way school grounds are used formally for teaching, informally at lunch and break times and outside of normal school hours for increased extra-curricular or community activities, maintenance may be affected.

Physical changes to the school grounds

The link between making changes to the physical nature of a site and the need for altered maintenance is an obvious one but often the group responsible for implementing the change may not be the same as that responsible for its maintenance. Therefore it is important that the long term maintenance requirements of any new or altered feature are given thorough consideration.

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