



SCHOOL RESOURCE MANAGEMENT NETWORK

Working together to support schools & trusts



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Guide to Procuring Consultancy Services

Version: 1.01

Introduction

Choosing the right consultant can significantly enhance your school's performance, streamline operations, and deliver substantial savings. We are committed to helping schools and MATs secure those benefits.

This SRM Network guide is adapted from DfE advice. It will help you confidently select and engage consultants who can genuinely add value to your projects.



Why use a consultant?

Effective use of consultants brings knowledge, skills and experience in from outside your organisation which you only pay for as long as you need. It's a cost-effective approach to project management, reducing specific risks or simply adding an extra pair of hands.

Every week, thousands of school leaders decide to buy-in one form of consultancy or another. These include professional services to help develop their strategy, policies, and teaching and learning methodologies, including:

- academy conversion
- admission processes and planning
- curriculum planning
- forecasting, planning and strategy
- legal services
- letting contracts for significant areas e.g. catering or cleaning
- national policy implementation
- Ofsted audit planning
- special education needs

When schools and trusts are managing or developing their buildings, a further team of consultants provide the support needed, including:

- architecture
- buildings contracts
- cost consultancy
- planning
- property management
- structure engineering and design
- survey services

Experienced leaders know using consultants makes sense. But how do they ensure that they get value for money when using them?

Read on and this guide will tell you...

Before you start

Before you choose a consultant, you'll need to:

Done?

- **define why** you need to use a consultant ☐
- **consider** whether the consultant or their team should have professional **qualifications** relevant to their specialism and have **experience** of working in the education sector ☐
- consider **asking for references** or case studies of previous jobs where the consultants have provided real value for money ☐
- **know what will be in or out of scope** (knowing exactly what you want will prevent misunderstandings later) ☐
- **determine** your available **budget** ☐
- **calculate** whether **any savings** to be found as part of the project will exceed the cost of a consultant ☐
- decide, in advance, how changes to the project scope or timeline will be handled, including **who needs to agree** the **changes** ☐
- have a timetable with a **start and end date**, showing key dates and milestones (you may not have sufficient knowledge to set out a timeline, in which case, use what you do know to propose one to potential consultants and invite their feedback) ☐
- find out **whether the consultant will have enough resources** to work on the project and who'll cover the absence of any important staff ☐
- find out what **level of insurance or indemnity** the consultant holds ☐

Fees and payment

Ensure all costing proposals are clear, including agreeing:

Agreed?

- what **payment basis** or model you'll use, for example, simple fee, day rate or contingency-based savings ☐
- a full **breakdown of pricing** so you can identify and challenge any potential hidden or additional costs ☐
- what **expenses** (if any) are included in the fee, for example, travel ☐
- what **approval processes** apply to expenses or other chargeable costs the consultant may incur ☐

Agreed?

- a **period for** which the **fee structure** is valid ☐
- a **process for** dealing with any changes, especially changes which might incur **additional fees** ☐

We believe a transparent approach to expenses and disbursements is best. Consultants will only build these costs into their fees if clients disallow them at tender stage. That would mean such costs would not always be visible.

Charging models

Simple fee basis

This is where you agree:

- what work will be in scope
- what deliverables will be included
- a fixed price for the work

Consultants may charge you extra for things not covered in your original agreement so make sure your costing proposals are clear and you explicitly agree what's in and out of scope.

Day rate

This is where you agree with the consultant an estimated number of days to complete the work.

You might want to negotiate with the consultant on price and ask whether they can offer you any extra services for free.

Contingency-based share of savings

This is where you'll agree to give the consultant a share of any savings they can make instead of paying them a fee or rate.

The arrangement is similar to a no-win, no-fee arrangement, but can lead to the consultant taking a significant proportion of the savings so you may want to consider:

- asking to cap the fee or amount you'll pay the consultant even if they make large savings

- only paying the consultant when a specific level of savings have been made or specific milestones in the project have been reached (this allows you to understand when and how much you'll pay the consultant)

At the time of writing - 26th February 2025 - this type of arrangement featured on the DfE's Buying for School Website (<https://www.gov.uk/guidance/buying-for-schools-things-to-consider-before-you-start/consultancy-educational-services-and-design-and-build>).

Whilst the DfE guidance doesn't refer to the Academy Trust Handbook's requirement to seek approval for contentious transactions, here at the SRM Network, we advise a cautious approach and that you should seek prior approval before agreeing to uncapped fees. Similarly, maintained schools are advised to inform their local authority finance team.

Governance and regulations

You must comply with your school or trust's procurement and finance policy, including:

- how and when you make payments
- any reporting arrangements
- procedures consultants must comply with

You can always check the DfE guidance on [buying procedures and procurement](#) if you are uncertain.

Procurement support from the SRM Network

All our members will work with you provide quotes, proposals and service level agreements which address the issues set out above. Remember, they respect you and your setting and want to make doing business with you mutually beneficial.

Why not ask them to help you to:

- draw up a mutually beneficial business plan
- understand the likely costs if it's not a fixed cost project
- co-create operating models which target savings
- define what deliverables are in scope
- define what outcomes should be delivered

You can also contact the SRM Network team for an initial no-obligation chat about your consultancy needs based on good practice and findings from other schools' projects.

