



ASSET / ESTATE MANAGEMENT POLICY

**Presented to Trustees Resource Committee
17 June 2026**

Date approved: ¹	21 June 2023
Date reviewed: ²	17 June 2026
Date of next review: ³	Summer 2029

¹ This is the date the policy was approved by the meeting

² This is the date the policy was reviewed prior to its approval above

³ This is the date as set by the policy review clause or the date approved plus three years

Footnote:

- Headteacher also means Head of College and Principal
- School also means College, Academy or Academies
- MAT refers to Multi-Academy Trust

1. **Strategic Estate Management**

1.1 Strategic estate management is what the Trust does to make sure that it manages the estate to achieve its charitable objectives. Strategic estate management helps the Trust to:

- Make decisions supported by evidence.
- Use resources effectively.
- Maximise the estate's value to the Trust to achieve its charitable objectives

1.2 To manage the Trust estate strategically it must:

- Understand what needs to be done with the estate to meet education goals.
- Have good governance arrangements.
- Assign clear responsibilities across the Trust for managing the estate.
- Make and implement plans.
- Review and track performance.
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2. **The Trust Vision for our Estate**

The vision for the estate must support the charitable objectives of the Trust. The agreed vision is:

- To provide estate buildings which are safe, warm and dry.
- To support the delivery of our curriculum and ensure excellent outcomes for learners.
- To share resources for the common good, based on collaboration between academies.
- To be financially disciplined so that spending on the estate is prioritised within the financial constraints.
- For all its academies to be equal partners and for available funding to be allocated fairly and according to need.
- To be committed to fulfilling the Trust's responsibilities for compliance and to protect the health and safety of students, staff and the communities when using the estate.
- To understand the estate is a community asset and will make it available for the provision of recreation, sporting or other leisure time activities for the community whenever we can find a way to make this financially viable.
- To make decisions about the estate, considering the long term, ensuring these assets are available for generations to come.

3. **Estate Strategy**

3.1 Size of Academies

The Trust will work closely with Local Authorities in the areas in which it operates and beyond, to respond to pressures on school places. This includes working to open new schools where there is a proven need for places and expand existing academies to meet need, with capital support from Local Authorities and the Department for Education (DfE) to do so.

3.2 Delivery of the Curriculum

New building and reconfiguration to support the needs of the curriculum is supported on the basis that the curriculum itself is deliverable and financially sustainable over the long term. The Trust will take advice on the DfE recommended school sizes to deliver an acceptable curriculum.

3.3 Suitability

The Trust acknowledges that having an attractive and appealing estate results in students wishing to attend our academies and staff having a comfortable and functional place in which to work. The Trust will also consider suitability when planning remodelling or expansion of our estate, choosing to make crucial adjustments to improve the attractiveness and appeal of the estate where this is practical and affordable.

3.4 Standard of Work

When carrying out expansion or refurbishment work, the Trust aims to complete work to the highest standard, to ensure the work is fit for purpose and has a long lifespan, meeting all building and other regulations. The Trust will consider appointing a project manager to manage medium to large projects to ensure that a high standard is achieved. The Trust may decide to project manage some projects internally as we have a significant level of expertise within the Trust, but only if there is confidence that there is the capacity and expertise to ensure satisfactory completion of the project.

3.5 Insurance

The Trust will hold sufficient insurance to protect it against the financial consequences of serious damage to its buildings. The Risk Protection Arrangement provided by the DfE will always be considered against other insurance quotes.

3.6 Compliance

In order to make sure the Trust is compliant with all legal and other requirements, the following actions will be carried out:

- Regular compliance checks in academies by academy staff which are tailored to the needs of the individual estate.
- Regular compliance checks in academies are carried out by a competent contractor, where this is required by legislation or policy.
- Regular audits of compliance carried out either internally or externally.
- Reporting of compliance to be considered by the Board of Trustees, at Local Governing Committee level and by the Headteacher of each academy.
- In the event of non-compliance being identified, an action plan is put in place to return the estate to full-compliance.

3.7 School Condition Allocation

To allocate the spending of the Schools Condition Allocation (SCA), it is important that the Trust maintains up to date information of work that needs to be carried out across the Trust. The SCA can be spent on repair, refurbishment or new capital build across the Trust. It is expected that funding is spent in the financial year of receipt (April to March), however, normal terms of Devolved Formula Capital (DFC) apply, meaning there is an additional 2 financial years to spend funding.

Spending decisions (agreed in principle by the Trustees Resource Committee) will be made by the Targeted Capital Project (TCP) Committee in the Summer term of each year. To facilitate this, each academy will be asked to submit a Condition Survey Report (CSR) by Easter (Appendix 1) each year, identifying work to be completed in the next 3 years.

Any work identified as a priority (eg relating to Health and Safety) must be accompanied by a more detailed explanation, as this will be considered first.

In addition to the SCA, each academy will receive DFC funding as part of the main school grant to spend as it sees fit. The progress of projects will be monitored by the TCP / TRC Committee.

3.8 Preventative Maintenance

It is acknowledged that the education system sometimes rewards a lack of preventative maintenance. If a problem is left long enough, the cost to solve it becomes so great that it becomes an issue that can only be funded by the Trust funding allocation (currently Schools Condition Allocation) or by funding direct from the DfE for rebuilding. There is not enough money in the system to be able to afford to allow the estate to deteriorate unnecessarily.

The Trust will identify, plan and carry out preventative maintenance (eg servicing, repainting) to ensure our estate assets have the longest possible useful life.

3.9 Value for Money

When procuring works to its estate, the Trust will use the Financial Scheme of Delegation at all times to achieve value for money.

The Trust will procure collaboratively to achieve economies of scale when buying goods and services required across the estate. This will ensure consistency as well as limiting the cost to individual academies.

3.10 Training

All staff will receive appropriate health and safety training related to the estate. Staff with specific responsibilities for managing the Trust estate will receive access to targeted appropriate training.

3.11 Accessibility

The Trust's estate should be accessible to students, staff and members of the community. The Trust will make reasonable adjustments to the estate to provide for the needs of our students and staff as they arise. The Trust will also consider accessibility when planning remodelling or expansion of the estate, choosing to make crucial adjustments to improve accessibility where this is practical and affordable.

3.12 Sustainability

When considering any remodelling or expansion to the estate, the Trust will consider whether it is sustainable in terms of maintenance and replacement over time, taking into account any potential income generation opportunities or revenue cost (eg to heat and clean). A challenging option appraisal process is undertaken to ensure that the balance between capital and revenue spend is maintained.

3.13 Disposal of the Estate

When there is an opportunity to dispose of the estate (either by sale or by leasing a building to an external organisation), the Trust will:

- Have a business case for investing the proceeds of the disposal that achieves the Trust's objectives over the longer term.
- Ensure all legal and regulatory conditions are complied with, including obtaining permission from the DfE, planning, rates, etc.
- Consider any safeguarding implications.
- Ensure any lease is drawn up by a legal professional.

- Consider and determine whether the organisation or purpose which benefits from the disposal is in line with the Trust's aims and objectives.

3.14 Energy Efficiency and Environmental Benefits

The Trust aspires to improve energy efficiency across the estate, provided the initiatives bring both environmental and financial benefits to the Trust.

The Trust is aware that being energy efficient is about more than just energy generation (eg solar, wind) but about having efficient boilers, roofing, windows, etc and most importantly of all, encouraging energy efficient behaviours.

3.15 Funding and Probity

The Trust will comply with any conditions and reporting requirements imposed on the Trust as a result of receiving grant funding for estate improvement or expansion.

3.16 Impact of Works on the Estate

The Trust carefully considers the impact of the process of carrying out works on the estate, particularly the impact on the education provision while the works are going on. The Trust prioritises health and safety at all times, ensuring all students and staff are not put at risk by the building works. Works are planned logically to minimise disruption to day to day operations.

3.17 Collaboration

The Trust makes use of its estate for the benefit of all students and staff in the Trust, willingly stepping in to help out when the need arises.

4. **Governance Arrangements**

Governance arrangements are as described in the Trust's Scheme of Delegation.

5. **Review**

The CFO and Trust Resource Committee monitors the implementation of this policy.

This policy will be reviewed and approved by the Trustees every 3 years.

Appendix 1
Three Year Condition Survey Report



Academy:		Date:	
Project	Explanation / Detail	Cost (Estimate / Quote)	Priority (RAG)
<i>Example Fire Alarm</i>	<i>Replace fire alarm system which has reached the end of its life. Fire Officer advises replacement within next 2 years</i>	<i>Quote April 2023 £6,000</i>	<i>Health and Safety - Red</i>