

# Estate Strategy



Education is for improving lives and for leaving your community and world better than you found it.

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## 1. Strategic estate management

It is often said that our greatest resource is our people. On that basis, our second greatest resource is our estate. Financially the value of our estate assets dwarfs all other assets we hold, but we must always remember that we hold all our assets in trust to further our objectives as a charitable organisation. These can be summarised as the provision of free education, for and with the community in which each of our schools are located and our second legal object which is the provision of recreational and sporting facilities for the community. Our estate must be used to further these objectives, now and into the future as we are guardians of the estate in the same way as we are guardians of educational standards.

Strategic estate management is what we do to make sure that we manage our estate to achieve our charitable objectives. Strategic estate management helps the trust to:

- Make decisions supported by evidence
- Use our resources effectively
- Maximise the estate's value to the trust

To manage the trust estate strategically we must:

- Understand what we need to do with the estate to meet our education goals
- Have good governance arrangements
- Assign clear responsibilities across the trust for managing the estate
- Make and implement plans; and
- Review and track performance

## 2. The trust vision for our Estate

The vision for our estate must be rooted in the values and principles that underpin our trust as a whole. The agreed vision is:

- We aspire for our estate buildings to be safe, warm and dry
- Our estate supports the delivery of our school curriculum and ensures excellent outcomes for learners
- Estate resources are shared for the common good, based on collaboration between our schools, not competition
- We are financially disciplined and spending on our estate is prioritised within the financial constraints we work within
- All our schools are equal partners and available funding is allocated fairly and according to need, not according to size or school success
- The configuration of our estate supports excellent relationships between young people and other members of the community and we consider accessibility in our planning
- We are committed to fulfilling our responsibilities for compliance and to protect the health and safety of pupils, staff and our communities when using our estate

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- We understand our estate is a community asset and will make it available for the provision of recreation, sporting or other leisure time activities for our community whenever we can find a way to make this financially viable
- In making decisions about the estate we will always consider the long term, ensuring these assets are available for generations to come.

### 3. Estate Strategy

#### Size of school

The trust has a preference for schools to be of a suitable size to be viable over the long term. School buildings should ideally be designed to accommodate consistent multiple forms of entry (eg: 1 form entry, 2 form entry, etc in Primary and 5 form entry, 6 form entry, etc in Secondary). We appreciate this is not always possible and schools can be run in innovative ways to accommodate smaller cohorts with mixed age teaching and shared leadership. However, in respect of estate management we have a preference to work towards buildings that accommodate consistent numbers of forms of entry.

We will work closely with Local Authorities in the areas in which we operate and beyond, to respond to pressures on pupil places. This includes working to open new schools where there is a proven need for places and expand our existing schools to meet need, with capital support from Local Authorities and the DfE to do so.

#### Delivery of school curriculum

New building and re-configuration 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. We will take advice on the DfE recommended school sizes to deliver an acceptable curriculum and acknowledge that at the present time there is no earmarked funding available for expansion or re-configuration to meet curriculum needs alone.

#### Suitability

We acknowledge that having an attractive and appealing estate results in pupils wishing to attend our schools and our staff having a comfortable and functional place in which to work. We 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.

#### Standard of Work

When carrying out expansion or refurbishment work our aim is to “do a proper job” to ensure the work is fit for purpose and has a long lifespan, meeting all building and other regulations. Our current strategy is to appoint project managers to manage medium to large projects to ensure that a “proper job” is achieved, as it is unlikely we have this level of expertise in our trust.

## Insurance

The trust will hold sufficient insurance from a reputable company to protect us against the risk of serious damage to our buildings. At present the Risk Protection Arrangement provided by the DfE is considered to meet our needs in this respect.

## Compliance

In order to make sure we are compliant with all legal and other requirements, we will carry out the following actions:

- Regular compliance checks in school by school staff which are tailored to the needs of the individual schools estate. These are recorded in our estate compliance system
- Regular compliance checks in school are carried out by a competent contractor, where this is required by legislation or Policy. These are recorded in our estate compliance system.
- Regular audits of compliance carried out either internally or externally and recorded in our estate compliance system.
- Reporting of compliance to be considered by the Board of Trustees, at local Governing Body and by the head teacher and/or business manager of each school
- In the even non-compliance is identified, an action plan is put in place to return our estate to full compliance.

## Condition

Funding that the trust receives to tackle condition issues (currently School Condition Allocation) will be spent by prioritising those condition issues that have the greatest risk to prevent us using our estate for the delivery of education. This will be achieved by targeting those with the worst condition (D or C) and the greatest potential impact.

In order to prioritise effectively and also to allow us to bid for money when the opportunity arises, the trust will commission comprehensive consistent condition surveys across the estate on a 5 year rolling basis. Surveys will be shared with school staff and governors.

Where condition issues exist that are not being tackled using the trust grant, the devolved formula capital allocation to each school must be used where practical to resolve the most serious issues.

In some cases, condition issues may be so severe and funding so limited that the agreed course of action is either not to use the affected building or to strategically manage the condition until an opportunity arises to replace.

### **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 be only funded by the trust funding allocation (currently Schools Condition Allocation) or by funding direct from the DfE for rebuilding. Unfortunately there is not enough money in the system to be able to afford to allow our estate to deteriorate unnecessarily.

We will rigorously identify, plan and carry out preventative maintenance (eg: servicing, repainting) to ensure our estate assets have the longest possible useful life. CIPFA recommends that maintenance budgets are allocated 70% to planned preventative work and 30% to reactive.

### **Value for Money**

When procuring works to our estate we use the trust procurement policy at all times to achieve value for money. We will grasp opportunities to carry out work efficiently (eg: to do more than one thing when scaffolding is in place) or tackle a long held aspiration when a grant becomes available. We will also consider not doing works where they have a limited lifespan or do not fit into the longer term plans for our estate.

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

### **Training**

All our 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.

### **Accessibility**

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

### **Sustainability**

When considering any remodelling or expansion to our estate we 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.

### Income generation

We are bold when considering opportunities to invest to both fulfil our objective of the provision of leisure facilities and income generation to support the running of the school. We take advantage of opportunities to access grants and therefore to be able to carry out projects which impact beneficially on our community. We always put together a business plan to analyse these opportunities and ensure they are sustainable in the longer term.

### Tenure

We understand the legal basis on which we hold our estate and receive relevant permissions from our ultimate landlord were applicable.

### Disposal of our estate

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

- Have a business case for investing the proceeds of the disposal that achieves our trust 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 our ethos and values.

### Energy Efficiency

We aspire to improve energy efficiency across our estate, provided the initiatives bring both environmental and financial benefits to the trust. We are prepared to borrow money (in a compliant manner) to carry out these initiatives. The financial benefits of the initiatives would go to the school where the school bears the capital cost, but to the trust where the school provides the capital. In this way all schools can benefit from the use of trust reserves and the trust estate.

We are aware that energy efficiency 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.

The trust central staff will purchase energy (gas & electricity) on behalf of the trust estate to achieve economies of scale.

### Funding and Probity

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

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### **Business Continuity**

We will have business continuity plans in place at a trust and individual school level to protect us in the eventuality of not having access to part of our estate.

### **Impact of works on our estate**

We carefully consider the impact of the process of carrying out works on our estate, particularly the impact on the education provision while the works are going on. We prioritise health and safety at all times, ensuring our pupils and staff are not put at risk by the building works. Work are planned logically to minimise disruption to day to day operations.

### **Collaboration**

We make use of our estate for the benefit of all pupils and staff in the trust, willingly stepping in to help out when the need arises.

## **4. Asset Management Plans**

Each school must have an asset management plan, responding to the above estate strategy, but tailored to the circumstances and priorities of the school. The asset management plan determines local priorities and actions.

## **5. Governance Arrangements**

Governance arrangements are described in the Estate Scheme of Delegation.

## Appendix 1 - Trust Estate

The trust estate currently consists of 16 schools; 11 Primary and 5 Secondary together with a licence of a serviced office for the trust central team.

School	Tenure	Size	Leisure/ Nursery Facilities
The Polesworth	Leasehold	Site area 24075m <sup>2</sup>	Leisure centre run by NWBC on short lease. Sublet building to ATC
Birchwood Primary	Leasehold	Site area 6381m <sup>2</sup>	Independent nursery and childcare provider sub-lets from WCC. Separate Children's Centre belonging to WCC.
Dordon Primary	Leasehold	Site area 3711m <sup>2</sup>	Independent nursery and childcare provider sub-lets from WCC
Wood End Primary	Leasehold	Site area 3026m <sup>2</sup>	
Stoneydelph Primary	Freehold	Internal 2234m <sup>2</sup>	
Chadsmead Academy	Leasehold	2478.5m <sup>2</sup>	
The Wilnecote	Freehold	Internal 9644m <sup>2</sup>	Leisure Centre and Library run by school
Woodloes Primary	Leasehold	Site area 5908m <sup>2</sup>	Sublet to NHS and to Community Centre
Budbrooke Primary	Leasehold	Site area 3773m <sup>2</sup>	Independent nursery and childcare provider sub-lets from WCC
Stratford Upon Avon Primary	Leasehold	Site area 2563m <sup>2</sup>	

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School	Tenure	Size	Leisure/ Nursery Facilities
Heathcote Primary	Leasehold	Site area 2626m <sup>2</sup>	Independent nursery and childcare provider sub-lets from WCC
The Telford Park	Freehold	Internal 9549m <sup>2</sup>	Leisure centre run by T&W Sublet to Tablet Academy
Grange Park Primary	Freehold	Internal 2237m <sup>2</sup>	School runs astroturf letting
Windmill Primary	Freehold	Site area 43300m <sup>2</sup>	Independent nursery and childcare provider sub-lets. Separate Childrens Centre
The Telford Langley	Currently licence but will be freehold	Site area 98.742m <sup>2</sup>	Leisure centre run by T&W. NHS have a licence. T&W data centre.
The Telford Priory	Freehold	Internal 9549m <sup>2</sup>	Next door Leisure centre run by T&W has use of some facilities. NHS rooms. T&W data centre.

## Appendix 2 - Key Performance Indicators and Targets

Strategic Area	KPI	Target	Notes
Compliance	Fire risk assessment completed within last 36 months by competent contractor	100%	"Big 6" compliance requirement
	Asbestos condition survey completed within last 12 months	100% of sites with asbestos	"Big 6" compliance requirement
	Water hygiene risk assessment completed within last 24 months	100%	"Big 6" compliance requirement
	Gas safety certification in place within last 12 months	100%	"Big 6" compliance requirement
	Electrical fixed wiring testing completed within last 60 months	100%	"Big 6" compliance requirement
	Site risk assessments formally reviewed within last 12 months	100%	"Big 6" compliance requirement
	Staff have completed and documented basic Health & Safety training	50% by 31.12.2019 (eventually 100%)	Data should eventually be available through Smartlog
	Staff with a specific responsibility for H&S on site have completed relevant training	50% by 31.12.2019 (eventually 100%)	Data should eventually be available through Smartlog
Condition	Percentage of schools with a condition survey less than 5 years old	100% by 31.8.2019	Currently being tackled through SCA
	D and C condition issues included in Asset Management Plan and with a project to tackle	50% by 31.3.2020 (eventually 100%)	Require standard AMP in schools and consolidated reporting
	Preventative maintenance plan in place	50% by 31.3.2020 (eventually 100%)	

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<b>Strategic Area</b>	<b>KPI</b>	<b>Target</b>	<b>Notes</b>
Strategy	Display Energy Certificates at each site demonstrate year on year improvements	At least one site improved its DEC rating each year	Currently schools buy DECs through a number of providers. To make this efficient we should move to a single provider and expect them to provide trustwide data as part of the contract.
	Average number of hours per week school site is available for community use	Maintain % level of community usage across thrust	This data not currently collected. Will need to consider what we do with multi- use provision (eg: sports centre)
	Estates Scheme of Delegation	In place by 31.12.2019	Will require full consultation
	Asset Management Plan includes strategic vision for school	2 schools by 31.3.2010 (eventually 100%)	Will need to scope what this looks like.