



# ESTATE MANAGEMENT STRATEGY

Revision Date	Reviser	Previous Version	Description of Revision
04/11/2022	Alison Draper (Chief Finance Officer)	Version 1	New Trust strategy created
04/11/22	Bernie Green (Chief Executive Officer)	Version 1	New strategy formally approved by the Trust CEO
07/12/22	Board of Directors	Version 1	New strategy formally adopted by the Board of Directors
02/01/24	Alison Draper (CFO)		Annual review- CFO job title updated, revision date adjusted to annually or when a new site acquired, removed reference to county council
31/01/24	Board of Directors		Revised policy formally approved by Directors
07/01/25	Alison Draper (CFO)		Annual Review – updated to include schools joining in 2024
22/01/25	Board of Directors		Revised policy formally approved by Directors
19/11/25	Alison Draper (CFO)		Updated to include schools joining in 2025

**This strategy document will be formally reviewed annually or when new sites are acquired and shared with all staff.**

## **The Strategy**

The Board Directors, Local Governing Bodies, Headteachers and Senior Leadership Teams are fully committed to having a strategic approach with the right plans and documents in place to ensure that the Trust's estate supports its educational needs and goals.

This policy document has been prepared in accordance with the Government's Good Estate Management for Schools guidance, and related legislation and is issued for the direction, guidance and information of all employees, pupils, parents, service providers and members of the public to whom it may apply.

This policy document covers the following sites:

### **Preston C of E Primary School**

The Toose  
Yeovil  
Somerset  
BA213SN

### **Kingfisher Primary School**

Kingfisher Drive  
Houndstone  
Yeovil  
Somerset  
BA228FJ

### **Countess Gytha Primary School**

West Camel Road  
Queen Camel  
Somerset  
BA227LT

### **North Cadbury C of E Primary School**

Cary Road  
Yeovil  
Somerset  
BA227DE

### **Manor Court Community Primary School**

Duck Lane  
Chard  
Somerset  
TA202ES

### **Huish Episcopi Primary School**

North Street  
Langport  
Somerset

TA109RW

**Hambridge Primary School**

Hambridge  
Langport  
Somerset  
TA100AZ

**Middlezoy Primary School**

Church Road  
Middlezoy  
Somerset  
TA70NZ

**Othery Primary School**

Othery  
Bridgwater  
Somerset  
TA70PX

**Pen Mill Infants and Nursery Academy**

St Michael's Avenue,  
Yeovil,  
Somerset,  
BA21 4LD

**Ash Church of England Primary School**

Main Street,  
Ash  
Somerset  
TA12 6NS

**Evercreech Church of England Primary School**

Paradise Crescent,  
Evercreech  
Shepton Mallet,  
Somerset,  
BA4 6EH

**Lovington Church of England Primary School**

Lovington,  
Castle Cary  
Somerset,  
BA7 7PX

**Ilchester Community Primary School (junior site)**

Somerton Road  
Ilchester  
Yeovil  
Somerset

BA22 8JL

**Ilchester Community Primary School (infants site)**

Illustrious Crescent

Ilchester

Yeovil

Somerset

BA22 8JX

**Butleigh Church of England Primary School**

High Street

Butleigh

Glastonbury

BA6 8SX

This policy also applies to situations where employees are required to work, visit, or supervise activities on other sites.

## **Estate Vision**

PPAT is committed to providing the best possible education and outcomes for every pupil in the Trust. The estate will support the Trust's core goals by:

- Providing an inspirational learning environment in every school and enabling every child to learn within a safe and secure setting.
- Maximising the potential of every element of the estate to enable and promote collaboration between children, staff and, where appropriate, the wider school and local community to enhance the learning and life experiences of all.
- Providing the best possible resources and facilities to enable children and staff to thrive, enjoy and excel.

## **Estate Management Strategy**

Strategic estate management within a MAT has three main purposes:

- To facilitate evidence-based decisions (such as capital investment priorities)
- To ensure the most efficient use of resources
- To maximise the value of the estate

The current PPAT estate profile consists of a mixture of small rural schools, slightly larger schools in rural areas and large villages, a growing town school and two large schools in towns. The moral imperative of the Trust is to enable every child, regardless of any other factor, to have the best possible education. As a consequence, the Trust has sponsored the majority of its schools to join the Trust following a poor Ofsted judgement or poor leadership often with low outcomes for children. This has resulted in the rightful focus on a rapid improvement in teaching

and learning and in an eclectic estate profile, much of it featuring historic underinvestment.

The profile of the schools in the PPAT varies considerably. The cost per pupil at our smaller schools is relatively higher than the per pupil cost in larger schools and some of this is reflected in the premises costs. Each school retains its own reserves and is responsible for funding its own prioritised maintenance plan (PMP) and Capital expenditure.

The estate management strategy therefore needs to include the following:

- The optimisation (within budget) of the facilities at each school to promote outstanding education and attract parents to the school.
- The development of a trust wide asset management strategy to maximise resources and benefits
- The review of estate use (in line with any foundation requirements) to facilitate collaborative working where appropriate, beneficial, and feasible.
- To rationalise the estate where appropriate.

Signed on behalf of the Trust:



Date: 04/11/22

Name: Bernie Green

Designation: Chief Executive Officer

## **Benefits of Strategic Estate Management**

1. Well maintained schools provide a safer learning environment.
2. Well-designed facilities can promote better attainment.
3. A financially sustainable estate will minimise surplus space and revenue costs, optimise revenue generation, prioritise investment and maintain asset value.
4. A well-maintained estate will minimise emergency works, prevent failures and loss of facilities and save money.
5. A well-maintained school will help create a positive impression and attract pupils and staff.

## **Asset Management Planning**

There are a number of factors that influence estate management. For PPAT these include:

1. The size, location, ages and types of buildings and land in the estate.
2. The information that we hold about the estate.
3. Land tenure and constraints.
4. Area based considerations of the need for places or the spare capacity in the system.

As a Trust, PPAT needs to make a strategic and long-term view of investment and expenditure across the whole estate. However, there is a wide variation in the situation of each school (large/small/rural/urban) and so allowance should be made in the way the strategy is delivered to allow for unique and differentiating factors.

Any investment in the estate should be based on evidence that it is addressing an educational need. This will ensure that all decisions are informed, transparent and consistent.

The strategic management of the estate must be linked to the Trust's business planning. In order to achieve this, the following must be achieved:

- A clear understanding of the role of the estate in meeting educational aspirations and goals.
- Good governance arrangements.
- Clear assignment of responsibilities across the estate.
- An agreed implementation plans.
- The review and tracking of performance

## Meeting Educational Goals

There should be a clear understanding of how the estate can support the vision and educational goals of the Trust and School Development Plans. This will ensure that the Trust is aware of:

- Any shortfalls or surplus provision in our schools and across the wider area (assessed through an evidence-based identification of need – Normally LA pupil forecasts and local knowledge).
- The level of investment needed to meet needs (based on the prioritised maintenance plans created following full condition surveys) and to keep the estate safe.
- The need for any changes that are required and the evidence and prioritisation for such changes.

PPAT is a mixed MAT with Articles of Association allowing for the inclusion of all types of Church of England Schools as well as those schools without a religious foundation.

Church of England schools are registered charities, and each have a Trust Deed setting out the charitable objects of their foundation. PPAT must ensure that the goals set for these schools meet the requirements of the school's foundation.

PPAT must meet its obligations to the trustees of the school in relation to the maintenance and upkeep of the buildings and land.

PPAT contains schools leased from Somerset Council and The Bath and Wells Diocese. Several schools are also owned on a freehold basis.

## Governance Arrangements

PPAT has governance arrangements in place to ensure that:

- The estate is recognised and managed as a strategic resource.
- There is Board level and Executive leader responsibility for the estate.
- All estate related roles and responsibilities are defined and understood.

The Trust Board has strategic oversight of the estate and all matters pertaining to it. They receive reports from the CFO in conjunction with the CEO and Trust Health & Safety and Compliance Officer

The Trust Board has overall responsibility for Health and Safety across the Trust and reviews and approves this policy on an annual basis.

The Trust Health and Safety and Compliance Officer undertakes a termly inspection of each school, in conjunction with the Headteacher and/or the Site Manager. The

resulting reports feed into the consideration for strategic capital investment and the risk register across the Trust as a whole (notably if patterns or areas of commonality are identified).

Any urgent issues are raised immediately to the CEO for attention.

## **Responsibilities**

The CFO has responsibility for developing the strategic estate planning for PPAT. This is then shared with the CEO and Senior Executive Team before going to the full Board for approval.

The CFO oversees the estate management programme and leads it at an operational level too. The CFO will liaise with the Trust Health and Safety and Compliance Officer and Headteachers on the implementation of the estate management strategy and plans.

## **Current Situation:**

1. A condition survey for each school was completed in April 2023
2. The CFO will compile comprehensive prioritised maintenance plans (PMPs) as a result, in conjunction with the Trust Health and Safety and Compliance Officer
3. The undertaking of project management of CIF bids is currently being undertaken by Leaver Consultancy and Trinity Cowell. This is reviewed with each project bid.
4. Reactive maintenance issues are being managed at school level using the approved contractors list.
5. CIF bids were submitted in December 2018, 2019, 2020 and 2021 by Leaver Consultancy and Trinity Cowell, working with the CFO, on behalf of the Trust. A further CIF bid was submitted in 2023 by Futures for Somerset
6. Compliance is being monitored at school level by the Site Manager in conjunction with the Trust Health and Safety and Compliance Officer.
7. PPAT employs its own NEBOSH trained Health and Safety Officer who is the Trust's designated 'competent person' for Health & Safety, and they conduct regular audits across the trust.

It is the responsibility of the CFO to ensure that all works and projects are prioritised to meet the Trust's educational and safety goals.

Estate management decisions must be predicated on budget availability and value for money. Projects may not progress until sufficient funding has been identified and approved at the appropriate level.

## **Approval Levels:**

1. Up to £1000 expenditure can be approved at school level but only where funds are available.

2. Up to £9,999 expenditure can be approved by the CEO/CFO but only where funds are available and the works have been identified under the school and/or Trust's prioritised maintenance plan or are urgently required in the interests of H&S. Three quotes should be sought for works to ensure transparency and best value, in line with the Trust's procurement policy.

3. Expenditure over £10,000 must be agreed in advance by the Finance and Audit Committee. Three quotes are required for these works which must be submitted with the Headteachers narrative to the Finance and Audit Committee.

It is the responsibility of the CFO, to:

- Ensure appropriate prioritisation
- Secure funding sources, ensure budget availability and ensure that financial/legal/practical constraints are identified and taken into account
- Ensure best value for money and maximise impact of available resources
- Minimise disruption to school operation during works

## **Reviewing and Tracking Performance**

The performance of the estate should be reviewed and tracked in order to:

- Ensure that the Trust Board recognise the importance of good estate management including:
  - Running costs
  - Condition
  - Required expenditure
  - Inefficiencies (e.g. excess space)
  - Safety issues
- Consider options for improvement e.g., refurbishment or new build, repair or replace, rationalise, or re-allocate.
- Optimise use of funds including via:
  - Change of supplier
  - Procurement via approved frameworks /local suppliers/collective bargaining
  - Capital investment to secure revenue savings
  - Effective contract management and collective bargaining

- Assess performance against similar sized MATs and identify areas for improvement

## **Strategic Pillars**

The overall strategy is based around 4 strategic pillars, which are:

1. Compliance First
2. Condition
3. Sufficiency and Suitability
4. Energy Efficiency

### **Compliance First**

Health, safety, and well-being of PPAT pupils, staff and stakeholders comes first. The number one priority is confirmation that our land and buildings are safe, secure, and meet all statutory requirements and insurance terms and conditions.

At PPAT, condition surveys every 3 years and the subsequent production of 5-year maintenance plans will ensure that compliance issues are always prioritised above other estate needs. The termly H&S inspections by the Trust Health and Safety and Compliance Officer will seek to identify any occurring compliance issues between surveys and will require schools to address these as a priority.

Asset registers will be maintained by the CFO, and a record of all servicing and relevant certificates will be maintained at a school level. Annual Condition Improvement Fund (CIF) bids will prioritise compliance related issues e.g., safeguarding, fire safety, electrical compliance, gas safety, asbestos removal, legionella etc.

### **Condition**

With ever diminishing funds available from which to maintain our ageing assets, it is essential that PPAT understand the liabilities associated with component and fabric life cycles and have a plan to address these, minimising costs and maximising our return on investment.

As with the first pillar, condition surveys every 3 years and the subsequent production of 5-year maintenance plans will ensure that any identified condition issues are prioritised above other estate needs, with the exception of compliance (which will always take priority). This should reduce the need for repeat reactive repairs expenditure. The condition surveys will be used to prioritise component renewals that have the highest impact on business continuity. By completing surveys and maintenance plans for all PPAT schools on the same schedule, options to batch/bundle component renewals can be explored, to reduce delivery costs and

minimise disruption to school operations. Annual Condition Improvement Fund (CIF) bids will treat condition issues as second priority (following compliance related issues) e.g., boilers and heating distribution, roof renewal, window upgrade, temporary classroom replacement etc.

## **Sufficiency and Suitability**

It is important to understand whether our school portfolio has suitable capacity and facilities to provide for current and future pupil needs. Under-utilised space and land can be used to attract inward revenue and investment, helping us to achieve our development ambitions or reduce our expenditure.

Projected increase/decrease in local pupil placement demand, as published by the local authority, will be monitored to ensure sufficient space is available for projected pupil numbers. Sufficiency surveys using the net capacity guidance and tools provided by the DfE will be carried out on a regular basis to help identify any insufficient or excess space. Legal ownership of the portfolio is established and is reviewed annually as part of the DfE Land and Collections Building Tool completed by the CFO.

As and when insufficient space is identified, PPAT is aware of the following funding sources that are available:

- Condition Improvement Fund - 10% is ring-fenced for expansion projects at oversubscribed academically successful schools
- Basic Need Funding- drawn down from local authority by evidencing capacity to fulfil additional pupil demand
- S106/CIL - both allocated and unallocated funds may be available for development purposes - Land/Asset Disposal/Rental - potential to sell or lease land to raise funds or inward revenue for re-investment

## **Energy Efficiency**

PPAT is aware that there are opportunities to reduce energy cost expenditure and also to meet forthcoming accounting requirements such as the Streamlined Energy and Carbon Reporting (SECR). Through understanding our schools' current energy usage and performance, we can dramatically reduce electricity costs and our carbon emissions.

We will constantly analyse our present energy provider's contract and establish whether we are on the most advantageous tariff including 'volume tolerance' clauses. We will continue to track all energy and water usage through a centrally held spreadsheet, with the CFO having overall responsibility for analysing this data. PPAT has an Environmental and Sustainability policy, which will be reviewed regularly, and individual schools held to account in regard to the provisions it contains.

PPAT will look to access funding to improve energy efficiency through annual CIF bids and through the now annual Public Sector Decarbonisation scheme.

## **Capital Investment**

A fundamental part of how the above Estate Management Strategy will be achieved is to determine a strategy for capital investment into the estate, The strategy is to be reviewed post Condition Surveys