



Effective Estate Management Paving the Way for Successful Growth

Baily Garner have over 30 years' experience in the education sector. We have seen the complexities and challenges faced in managing estates continue to grow. With reducing budgets and buildings falling further into disrepair supported by the National Audit Office report of June 2023, which identified 24,000 school buildings as being beyond their estimated design life and 700,000 pupils attending schools requiring significant refurbishment.

When striving to maintain and enhance the physical environments of educational institutions, the correct maintenance and implementation of an estates strategy to keep our estates in good working order is a critical success factor and will also support pupil attainment and staff retention.

This covers 3 basic, core principles – Ensuring our buildings are dry, safe and warm.

It's safe to say the recent change in the Academy Trust Handbook is yet another hurdle to navigate, as it will impact everyone within Academy Trusts with a responsibility for estates. Consider, too, that this comes after a series of unprecedented events – namely the Covid 19 pandemic and the recent disruption and confusion caused by the chaos surrounding RAAC. Such events have resulted in full or partial closures of key areas, threatening the learning of our young people, while also carrying a significant cost to schools. The government has identified capital funding to the process of identifying and mitigating RAAC, but the situation has also highlighted broader concerns about the state of school infrastructure and the need for increased levels of investment.

Here, National Education Sector Lead, Rob Tyler, discusses the challenges faced by schools, along with the key tools required to ensure effective estates management whilst navigating the recent changes to the Academy Trust Handbook.

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POLITICAL OUTLOOK

At the recent Labour Party Conference, Secretary of State for Education, Bridget Phillipson, stated the “mess the Tories left behind stacked the odds against our children even further”. The education secretary pointed towards a nationwide curriculum and sector review, and pointed to the Children’s Wellbeing Bill and other proposals as a means of reforming the education sector.

This reform has arguably commenced, with confirmation of funding in connection with the expansion of school-based nursery provisions. Schools will be invited to bid for a share of £15 million in capital funding to deliver the first tranche of a proposed 3,000 nurseries. This proposal was developed in response to falling roll in primary education, with an intention to repurpose spaces by “converting empty classrooms” into nurseries.

As a sector, we must ask whether this is a priority given the condition of our educational estates. It will ensure classrooms remain filled, but are we simply putting students into unsuitable classrooms? It is our view that allocation and direction of funding is a key part of the new government’s review.

CHANGES TO THE ACADEMY TRUST HANDBOOK

A further consideration to achieve good estates management is the revision to the Academy Trust Handbook, published in July 2024. The changes within the Handbook came into effect 1st September 2024 and understanding them is fundamental for everyone responsible for governing, managing and auditing an Academy Trust. Changes have been intentionally kept to a minimum, as noted by David Withey of the Department for Education (DfE) in his letter to all academy trusts accompanying the

handbook. However, one particular change will be hugely impactful to the specific obligations related to estates. So what is this change?

While the DfE and Education and Skills Funding Agency (ESFA) have long held the power to issue a Notice to Improve, they will now be able to do so not just to address safeguarding, operational and performance requirements, but also in relation to poor estate management. The handbook now reads that a Notice to Improve may be issued for the following reason:

“Trustees and the executive failing to manage their school estate and maintain it in a safe working condition, strategically and effectively”.

In practice, this means identifying, developing and implementing a strategy has never been so critical.

The solution? A robust plan to set the foundations for successful and sustainable estate management, and (where there are aspirations to do so) grow your Trust.

WHAT MUST BE CONSIDERED FOR GOOD ESTATE MANAGEMENT?

Condition Surveys - Do they fit your need?

A condition survey is fundamental to setting the foundations for good estate management. Depending on the scale of your organisation, this can be a significant undertaking. Regardless of size, such an exercise shall see the collation of a significant amount of data.

“Data is like garbage. You’d better

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know what you are going to do with it before you collect it.”

The above quote from Mark Twain could not be more apt – obtaining accurate data to reflect your need is vital. We are all too aware of funding restrictions on Trusts, and these will be further intensified by the responsibility to deliver on the latest requirements of the Handbook. It is therefore important that urgency of need across your estate is established. This will allow you to triage the findings into an effective strategy, supported by data, to address critical elements of work.

Statutory Compliance – Are you aware of your obligations?

Quite simply, do you know your legal obligations? This covers a number of matters, including but not limited to asbestos, legionella, fire safety and gas and electrical safety. There are a number of legal requirements to adhere to, namely Workplace (Health, Safety and Welfare) Regulations 1992, Regulatory Reform (Fire Safety) Order 2005, The Electricity at Work Regulations 1989

Do you have clear procedures to deliver on these requirements and have the necessary skills, knowledge and expertise to do so?

Strategic development – Define the vision, develop the strategy

Set a clear plan, driven by your Trust's objectives. The teaching and learning environment is an important factor, therefore you need to know what investment is needed to support it. Access to and the allocation of funding looks to remain an unknown entity, but by being strategic you can address the “showstoppers” of your estate – leaking

roofs, life-expired boilers, non-compliant fire doors – while maintaining a trajectory toward achieving more ambitious plans, perhaps around decarbonisation, expansion and “nice to have” aspects.

Delivering works – Avoid creating future problems

At the outset of this section, we noted the importance of defining a Condition Survey that fits your needs. To that end, any construction project must be well planned and bespoke to the needs of the Trust and potentially its cohort (SEN for example).

Take the replacement of boiler plant as an example – how will the system best serve your needs? Do you understand the maintenance requirements, lifecycle costs and committed spend over the element life? To make sure questions like these are considered, it is important to ensure the correct people from your Trust are involved in design discussions and solutions.

The quality of construction is a further critical factor – how are you monitoring this and do you have the skills/competence to do so, or require support from a third party?

Without effective quality control, incorrect or poorly implemented solutions may result in future problems.

Maintenance – Do you have the required competence in-house?

Does your team have appropriate skills and is there appropriate training in place? Yes, this will come at a cost, however if your staff do not have the right tools and knowledge to effectively manage your estate, this will inevitably lead to challenges in managing your estate and wider cost implications. Linked to this – are internal processes sufficient? It is important to ensure lines

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of reporting and template documents are in place to support staff and ensure consistency.

Funding

A key part of forming a strategy is identifying anticipated spend and allocating budget/funding effectively. But inevitably, the availability and accessibility of funding is limited.

For those at the mercy of CIF, we are only too aware it can feel like a lottery given the number of institutions in need, and typical oversubscription of 5 times the allocation. There has been a gradual decline in funding allocated to CIF over the past 5 years since its peak in 2021-22. In March of this year, the results were published for the 2024-25 round of funding, revealing the lowest number of successful projects since the fund began. Allocated funding dropped below £450m, and a number of those schools in desperate need have only in the past 2 weeks been updated on the results of an appeal process which commenced in early-2024.

For SCA, there has been a slight increase in funding, however not enough is being done to combat the issues our schools face. The total SCA allocation has sat on or around £1.1bn for the last 5 years – being outstripped by inflation and cost increases across the industry.

At the recent Education Estates Conference, the Labour Party criticised CIF as an entity and also proposed a department wide review of how funding is provided. There are significant changes ahead – notably the closure of ESFA in March 2025 and its absorption into DfE. This will see funding centralised from end-March 2025, from which we can expect further announcements.

Funding can also be associated with how you use your buildings - Can your spaces be used outside of school hours to drive revenue? Although used for school clubs and perhaps short period of lettings, there is inevitably significant periods of time where the school is empty and could be generating further funding to support schools in navigating these challenges.

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BAILY GARNER CAN PROVIDE THE SOLUTION

Baily Garner have extensive experience in supporting Multi-Academy Trusts in developing a strategy to support in good estate management. Through our multi-disciplinary teams, this includes developing condition surveys, net capacity studies, heat decarbonisation plans and strategic prioritisation of improvements to inform future planning.

Effective estate management demands a precise understanding of your current assets. Without a robust plan in place that prioritises the biggest risks, you could be responsible for your school falling foul of requirements in the new Academy Trust Handbook.

Accurately collecting and analysing data is crucial, and by fostering a proactive approach to estate management, you can not only address immediate maintenance needs but also strategically plan for future growth.

Your strategy is vital – Firstly defining the vision for your Trust, followed by the strategy to deliver. This must also consider where support from third parties is required to support your plan and deliver on your objectives.

As regulatory landscapes evolve, having a clear strategy that isn't reliant on funding will empower you to navigate changes successfully and ensure your estates contribute positively to the broader educational mission.

Baily Garner are passionate in supporting good estate management and using our expertise to work closely with estates professionals in this sector to develop a proactive strategy. For support and advice, please get in touch.



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