

# Good Estate Management for Schools Digest With Funding Advice

**VISION**

**Compliance**

**Condition**

**Sufficiency**

**Energy**

## Hello,

This summer the ESFA are due to publish a re-freshed best practice guide, updating the 2018, Good Estate Management for Schools (GEMS) guidance, which advises academies on how best to manage their built environment.

[www.gov.uk/guidance/good-estate-management-for-schools](http://www.gov.uk/guidance/good-estate-management-for-schools)

I've prepared this easy to digest update to:

- Highlight the benefits of adopting GEMS best practice to Estate Management
- Advise on how you can optimise investment and secure available funding to improve your estate

### Developing The Trust

Joining the dots: Podcasts



## Vision

Firstly, it is best practice to establish a clear vision and purpose for the maintenance and development of your estate.

Developing this in collaboration with local authorities, governors, staff and local stakeholders will help to build consensus, ensuring alignment with local priorities, parent aspirations and economic development plans, thereby widening funding opportunities and your chances of success.

The vision should be underpinned by a 5-year strategy which provides the direction of travel, objectives and action plans covering all estate needs, costs and changes required over that period.

### **Your strategy should include 4 key strategic pillars:**

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

Each pillar should address the unique challenges and features specific to your school estate via clear tactical actions, cost plans, owners and timelines. These strategic pillars are explored overleaf, summarising GEMS best practice and the funding streams and opportunities available to schools to help you achieve your school estate ambitions.



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**Compliance**

# 1. Compliance First

It goes without saying that the Health, Safety and well-being of your pupils, staff and stakeholders comes first. Therefore, it is essential that you confirm that your land and buildings are safe, secure and meet all statutory requirements and insurance terms and conditions.

## **Best practice will include:**

- Undertaking an initial and annual compliance audit
- Prioritising investment in non-compliant or unsafe assets
- Compiling a record of all serviceable assets and schedules
- Ensuring all records and certificates are kept up to date

## **Available funding:**

- Condition Improvement Fund prioritises H&S/ compliance needs, allocating the highest scores to:
  - Fire Safety
  - Electrical Compliance
  - Gas Safety
  - Emergency Asbestos Removal
  - Legionella
  - Safeguarding



**VISION**

**Condition**

## 2. Condition

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

### **Best practice:**

- Use component / fabric condition data to inform preventative maintenance programmes, reducing repeat reactive repairs expenditure.
- Prioritise component renewals that have the highest impact on business continuity
- Explore options to batch/bundle component renewals, to reduce delivery costs and minimise disruption to school operations

### **Available funding:**

- Condition Improvement Fund - condition data should be used to evidence the criticality of renewal projects, increasing your chances of securing funding for:
  - Boiler and Heating System
  - Roofs
  - Windows
  - Classrooms
  - Kitchens



**VISION**

**Sufficiency**



## 3. Sufficiency and Suitability

It's important to understand whether your 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 you to achieve your development ambitions or reduce your expenditure.

### Best practice:

- Establish projected increase/ decrease in local pupil placement demand
- Conduct sufficiency survey using DfE Bulletin 103/104, identifying insufficient/ excess space
- Establish legal ownership of the portfolio, determining any lease/ sale/ use restrictions
- Refresh estate management plan to include expansion/reconfiguration/ development plans

### Available funding:

- 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 fulfill additional pupil demand
- Buildings Facilities Improvement Grant - available for post 16 providers offering T-Level courses
- 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



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## 4. Energy Efficiency

Whilst energy accounts for a small percentage of total costs, it is one of the few expenses that can be decreased. In targeting energy reduction measures, you will need to understand your building energy performance, how you can control, monitor and use buildings more efficiently and the range of energy offers available to your school.

### Best practice:

- Install meters and collect, collate and analyse your consumption patterns
- Benchmark current energy rates and renegotiate, benefiting from economies of scale via consortia purchasing
- Use the DEC Advisory Report to identify options to improve your energy performance/ reduce costs

### Available funding:

- Salix Energy Efficiency Funding – for projects meeting a minimum repayment threshold, covering:
  - Led lighting
  - Boiler and heating system upgrades
  - Roof, wall, pipework insulation
  - Windows/draught proofing
  - Cladding
- Solar PV Power Purchase Agreements and Operating Leases - Renewable energy developers offer free solar PV in exchange for roof space, reducing school electricity costs and carbon emissions.
- Utility negotiation – companies renegotiate utility rates and achieve savings on behalf of the trust.

## Contact me

This digest was compiled to provide a simple guide for the type of audits, assessments and surveys that you are advised to undertake. The data and information, once collected and analysed, will then assist you prepare plans and programmes to ensure you are meeting your statutory obligations and achieve best value from your investments in the estate.

Further, the data can also be used to provide evidence in support of funding submissions and attract inward investment that will help offset the costs of managing and developing your estate.

If you would be interested in discussing any of the information provided in this digest, please do contact me.



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