

Good Estate Management for Schools Digest With Funding Advice



Hello,

In the summer of 2020, the ESFA published their refreshed best practice guide, Good Estate Management for Schools (GEMS)

www.gov.uk/guidance/good-estate-management-for-schools

I have prepared a simple digest of the benefits of adopting GEMS and further, added some funding routes that trusts may wish to consider.

- 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



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.



VISION

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:
 - Safeguarding
 - Fire Safety
 - Electrical Compliance
 - Gas Safety
 - Asbestos Removal
 - Legionella



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:
 - Boilers and Heating Distribution
 - Roof Renewal
 - Window Upgrade
 - Temporary Classroom Replacement



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



VISION

Energy

4. Energy Efficiency

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 your school's current energy usage and its performance, you can develop an energy strategy and dramatically reduce electricity costs and your carbon emissions.

Best practice:

- Analyse your present energy provider's contract and establish whether you are on the most advantageous tariff including 'volume tolerance' clauses.
- Install meters and loggers, collect, collate and analyse collected energy data
- Produce an options appraisal of the appropriate of renewable energy measures

Available funding:

- Condition Improvement Fund, for replacement of boilers, heating distribution systems, roof renewal including insulation upgrades et cetera
- Salix Energy Efficiency Fund, for specific renewable measures within a capped project value
- Public Sector Decarbonisation Scheme, meeting specific targeted funding measures
- Power Purchase Agreements (PPA) for Solar PV installations
- Operating Leases, for Solar PV, LED lighting

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.

LINK to Presentation: www.youtube.com/watch?v=c0KFZNm0iAQ&t=1s&ab_channel=TimWarneford



GOOD ESTATE MANAGEMENT
FOR SCHOOLS DIGEST
WITH FUNDING CIRCLE