

DRIVING SUSTAINABLE GROWTH IN MULTI-ACADEMY TRUSTS

MAT estate management: what to know

Boards need to be confident that school premises are suitable and will keep staff and pupils safe and secure. **Androulla Nicou** describes the processes to manage school estates effectively.

Good management of the estate reduces the risks associated with buildings and premises. It helps to prevent the need for significant capital expenditure and disruption which can follow building failure.

Common challenges in managing the estate include:

- funding
- time/staffing restraints
- compliance with legal requirements
- current condition of the estate
- procuring quality contractors efficiently
- lack of knowledge (including a lack of information about the estate).

Who is responsible for the estate?

The leaseholder, usually the Trust, is responsible for the land and buildings including:

1. the safety and security of pupils and staff
2. maintaining the condition of land, premises and equipment
3. making decisions about investment in the Trust estate and prioritising maintenance.



Estate management

Good estate management should provide safe and well-maintained premises, appropriate teaching facilities and a positive pupil experience.

Planning for jobs in advance will help procure the best deal and achieve the most value for money. Don't leave it too late and pay over the odds.

It's always worth trying to negotiate prices and remembering that you don't have to take first offer. Even 10% off where appropriate can make a huge difference to your spend and increase value for money.

As a Trust we have put in place arrangements for the following.

- Long term planning: this might be in the form of an estate strategy, where you consider future maintenance needs, projects and funding priorities for buildings and land.
- Asset management planning (AMP): producing an AMP for the estate will help you plan, manage and deliver the maintenance works and improvements that have been highlighted in the long term plan.
- Day-to-day management: the delivery of ongoing services and maintenance requirements to ensure that buildings operate as intended daily and support the continued delivery of education.

In a MAT, daily management of individual schools is commonly delegated to site managers, who may report to an estate manager, who in turn reports to the board. It is vital that everyone is aware of the lines of responsibility and accountability so that any concerns can be quickly reported and escalated where necessary.



Condition survey

The ESFAs Condition Data Collection (CDC) programme is designed to enable fair distribution of capital maintenance funding. A condition survey is required when bidding for capital funding.

A condition survey provides objective information about the condition of the estate. Carried out by qualified professionals, it uses a common grading system to enable fair comparison across sites and effective prioritisation.

The survey will include detail on:

- the current building condition and survey findings
- the costs of any remedial or replacement works
- future planned maintenance costs over a chosen period
- recommendations, concerns, and further action necessary
- any risks and the priority for addressing
- the management of school buildings.

The survey helps MATs to understand maintenance needs, wider property issues and prioritise delivery of works with available funds.

Ensure compliance

Legal requirements relating to the occupation of the estate include:

- health and safety law and other relevant laws and regulations
- planned preventative maintenance
- statutory inspecting and testing.

Particularly important is an understanding of asbestos and fire. A record of all asbestos, known or assumed to be in Trust premises, must be held for all Trust premises.



A risk assessment identifying the general fire precautions needed to safeguard persons in case of fire must be undertaken and regularly reviewed for all school premises.

Those with duties for health and safety in the Trust should make sure that the policies and the condition of the estate are compliant with appropriate legislation.

Checks and tests to be aware of include the below.

- Electrical and lighting systems
- Lifts and lifting equipment
- Heating and cooling systems
- Legionella
- Building fabric
- Working at height and fall protection systems
- Safety and security systems
- Extract systems
- Chemical storage

Plan for emergencies

Unforeseen circumstances can arise that result in severe damage or disruption to Trust premises. You should be aware of what insurance is in place to cover emergencies, and what the arrangements are for:

- ensuring the safety and security of pupils and staff
- communicating promptly with parents and carers
- contacting emergency services and meeting the requirements of the statutory bodies
- where necessary, making alternative arrangements for education to continue as soon as possible following the incident
- invoking emergency and business recovery plans
- seeking professional advice on immediate and longer-term action required to replace or repair the affected area where appropriate.



Spend wisely

When evaluating spend on the estate, the first step is to consider how you decide how much to spend on capital projects and maintenance each year. You can then prioritise your expenditure per project and plan in advance to be sure you're getting value for money.

You should be constantly monitoring and managing estate budgets and costs and ensuring you are complying with procurement regulations.

Increasing efficiency

Regularly review your contracts for maintenance, facilities management and professional support and advice.

Ask yourself these questions to help.

- Are we getting the best deals?
- Can we work with other schools and Trusts to reduce costs?
- Can capital expenditure lead to revenue savings? E.g. could energy efficiency projects and refurbishment lead to lower maintenance costs?

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