

# Perryfields Enterprise Academy Trust

## Estate Strategy



Perryfields Enterprise Academy Trust	
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## Version History

V24.1	March 2024	New Resource
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This resource has been produced based upon the DfE's 'Good Estate Management for Schools' (GEMS) guidance.

<https://www.gov.uk/guidance/good-estate-management-for-schools/strategic-estate-management>

This resource is based upon the DfE's 'Strategic Estate Documents'.

[https://assets.publishing.service.gov.uk/media/5f8468c3d3bf7f6ba6e77af1/A\\_guide\\_to\\_strategic\\_estate\\_documents.pdf](https://assets.publishing.service.gov.uk/media/5f8468c3d3bf7f6ba6e77af1/A_guide_to_strategic_estate_documents.pdf)

# Estate Strategy

## Introduction

Perryfields Enterprise Academy Trust (PEAT) is committed to ensuring that our estate (land and buildings) are strategically managed to support our overarching educational needs and goals. The Estate Strategy outlines how the Estate Vision will be achieved.

The Estate Vision is:

*To deliver PEAT's Educational Vision we need, fit for purpose, safe secure learning environments across our Trust. Our Trust's estate vision will guarantee we continue to invest in our buildings to ensure they remain, pleasant, safe, accessible spaces in our community where every child is cared for and looked after. PEAT will create outstanding teaching and learning spaces, both indoors and outside and provide safe and healthy spaces for our pupils and staff now and in the future.*

*As a growing Trust we will build sustainability into the development and planning of our estates, ensuring our schools continue to meet the needs of educating the young people in our communities.*

*PEAT will support its staff through developing Equality Diversity & Inclusion, People and Culture strategies to encourage development, succession planning, wellbeing and engagement. PEAT and its academies will continually review staffing levels to meet the needs of the business and delivery of the Trust's medium-term financial plan.*

## The Estate

As of 2024, the TRUST estate is comprised of one school. The geographical range of the site(s) is limited to Perryfields Junior School, Chelmsford, Essex.

## Aims

1. PEAT strives to deliver great places to learn and teach in, inside and out.
2. We want to ensure each premises within our Trust can deliver our Estates Vision to the highest standard.
3. Understanding what changes are needed across the estate and when, while reflecting on assessment of any works required and how these need to be prioritised.
4. Bringing a long-term view on capital investment and expenditure across the Trust, reflecting an assessment of condition and what is needed to make schools safe.
5. Develop Equality Diversity & Inclusion, People and Culture strategies.
6. Ensuring staffing levels meet the needs of the organisation and delivery of the Trust's medium-term financial plan.

## Objectives

- To provide a rounded overview of what input our premises need to provide safe and secure environments which support the Education Vision.
- To ensure premise data, information and knowledge informs how we provide capital investment and prioritisation across the Trust.
- To explore energy efficient, sustainability and green credentials across the Trust.

## **Suitability**

We acknowledge that having an attractive and appealing estate results in pupils wishing to attend our schools and our staff having a comfortable and functional place in which to work. We will also consider suitability when planning remodelling or expansion of our estate, choosing to make crucial adjustments to improve the attractiveness and appeal of the estate where this is practical and affordable.

## **Condition**

Funding that the trust receives to tackle condition issues (currently School Condition Allocation) will be spent by prioritising those condition issues that have the greatest risk to prevent us using our estate for the delivery of education. This will be achieved by targeting those with the worst condition (D or C) and the greatest potential impact. Where condition issues exist that are not being tackled using the trust grant, the devolved formula capital allocation to each school must be used where practical to resolve the most serious issues.

In some cases, condition issues may be so severe and funding so limited that the agreed course of action is either not to use the affected building or to strategically manage the condition until an opportunity arises to replace.

## **Standard of Work**

When carrying out expansion or refurbishment work our aim is to “do a proper job” to ensure the work is fit for purpose and has a long lifespan, meeting all building and other regulations. Our current strategy is to appoint project managers to manage medium to large projects to ensure that a “proper job” is achieved, as it is unlikely we have this level of expertise in our trust.

## **Value for Money**

When procuring works to our estate we use the trust procurement policy at all times to achieve value for money. We will grasp opportunities to carry out work efficiently (eg: to do more than one thing when scaffolding is in place) or tackle a long held aspiration when a grant becomes available. We will also consider not doing works where they have a limited lifespan or do not fit into the longer term plans for our estate.

## **Insurance**

The trust will hold sufficient insurance from a reputable company to protect us against the risk of serious damage to our buildings.

## **Impact of works on our estate**

We carefully consider the impact of the process of carrying out works on our estate, particularly the impact on the education provision while the works are going on. We prioritise health and safety at all times, ensuring our pupils and staff are not put at risk by the building works. Work are planned logically to minimise disruption to day to day operations.

## Asset Management Plans

Each school must have an asset management plan, responding to the above estate strategy, but tailored to the circumstances and priorities of the school. The asset management plan determines local priorities and actions.

## Strategic Plan

### Intent

**School Investment:** To ensure schools are fully maintained and developed, strategic investment needs to be a priority. Each school must have an asset management plan. Invest and maintain the digital requirements of the Trust ensuring the latest technologies are available and compliant with DfE requirements.

**Safe and secure buildings:** To ensure that our teaching environment is conducive to effective learning. Pupils and staff need to feel safe and secure in the environment provided, so that every child cared for in our schools is looked after and supported.

**Schools fit for purpose:** To develop our premises to ensure all spaces are accessible, stimulating, environmentally friendly and compliant spaces, fit for future generations.

### Implementation

#### School Investment:

- Explore revenue funding reserves in support of capital investment
- Devolved Formula Capital (DFC) is prioritised for digital procurement
- Monitor and apply for grant funding opportunities
- Monitor Decarbonisation funding opportunities
- Explore condition data collection in support of prioritisation of asset management plan.
- Any new building or re-configuration to support the needs of the curriculum is supported on the basis that the curriculum itself is deliverable and financially sustainable over the long term.

#### Safe and secure buildings:

- Assess each school premise to ensure they are safe places to educate our pupils
- Review of safety concerns within each school through both compliance monitoring and H&S audits
- Support of School Business Managers and Site Managers to monitor and maintain safe secure premises
- Review the site security measures in place around evacuation and lockdown practices and procedures
- Review site boundary security measures and ensure upgrades are implemented where required
- Support engagement and training around national initiatives (e.g. Secure by design, considerate contractors, compliance monitoring and checks)
- Disclosure and Barring Service (DBS) checks of all contractors engaged on sites across the Trust, Trust visitor policy to be followed by all.

**Schools fit for purpose:**

- Ensure data available across the Trust on condition, fire compartmentalisation, floor plans, key locations identified of service points etc.
- Review all schools Planned Admission Number (PAN)/Net capacity and suitability assessments are relevant and accurate
- Ensure cyclical redecoration programmes in place and budgeted through revenue funds, both internal and external.
- Review accessible provisions across the Trust (toilets, level access, lift provision, hearing induction loops etc.)

**Impact****School Investment:**

- 3 – 5-year asset management plan in place.
- Full understanding of funding limitations and shortfalls in prioritising delivery of capital investment across the Trust
- Full in year allocation and expenditure of DFC capital funding
- Fully approved and audited capital expenditure
- Statutorily compliant buildings across the Trust
- H&S compliant buildings across the Trust
- Condition data collection in place to support prioritisation of capital allocation
- Digital estate that maintains re-investment to keep pace with technologic advancements

**Safe and secure buildings:**

- Ongoing evaluation of risks, H&S and statutory compliance
- Trust wide evaluation of evacuation and lockdown practices and prioritisation of any building requirements identified
- Boundary works identified and capital funding in place to support upgrades over a phased period
- School teams feel supported and empowered to ensure their site is safe for teachers and learners
- Positive evaluation and monitoring through the Audit and Risk Committee (A&R)

**Schools fit for purpose:**

- Data available across the Trust on condition, fire compartmentalisation, floor plans, key locations identified of service and call points etc
- Evaluation of all sites available on a school-by-school basis
- Proper planning in place for cyclical maintenance within revenue budgets
- Applications made for future capital grants to support Trust initiatives
- A 21st century digital environment is maintained

**Approval**

This Estate Strategy was approved by the Trust Board on 28<sup>th</sup> March 2024.

**Review**

This Estate Strategy will be reviewed every three years to ensure it reflects any changes within the Estate Vision and wider educational priorities of Perryfields Enterprise Academy Trust (PEAT).