



Brontë Academy Trust

Great schools. Inspirational People. Strong foundations.

Estates Management Plan



Approved by	Date Approved	Next Review
BAT Trust Board	September 2024	December 2025

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INTRODUCTION

The Trust aims to ensure that, so far as it is reasonably practicable, the estate is fit for the purpose intended, complies with current legislation and is maintained to provide a safe, secure and welcoming environment suitable for educating today's children. Maintenance budgets are used for reactive and cyclical maintenance of existing building structure and fabric and electrical services, statutory inspections, equipment, and grounds maintenance.

The intention of this document is to:

- provide the strategic direction to ensure that our vision is deliverable where Bronte raises a family of 'great schools', provides a 'great place to work everyday and ensures 'everyone has everything they need to make a difference.'
- provide the strategic direction to a secure, fit-for-purpose, and safe learning environment.
- define the framework on which all building maintenance, new capital works projects and management operations should be based
- ensure a consistent approach in the planning, management and reporting of building maintenance.

BAT ESTATE

Land and buildings

The Trust Estate comprises four primary schools in the Worth Valley. The Land and buildings for the 3 schools, Haworth, Oldfield and Lees are owned by Bradford Metropolitan Council (BMC) with long lease agreements in place with the Trust. All land and buildings at Oakworth School, including a small parcel of land in the centre of the village are owned by the Trust.

Academy	Asset	Tenure	Terms	Expiry
Haworth Primary	School building & land	Leasehold BMC	125 Years	2141
Oldfield Primary	School building & land	Leasehold BMC	125 Years	2144
Lees Primary	School building & land	Leasehold BMC	125 Years	2141
Oakworth Primary	School building & land	Trust Owned		
	Field	Trust Owned		

Personnel

- CEO - Asa Firth
- CFO - Deborah Haworth
- Estates Trustee - Trevor Olsson
- Estates Lead - Mark Clark

Each school within the Trust employs their own full time caretaker with the exception of Oldfield, due to its size, that has the Estates Lead covering caretaking duties on a part-time basis. Each school has cleaning staff employed by the Trust.

BAT ESTATE VISION

Background

Brontë schools are built on strong foundations and those strong foundations underpin Brontë Academy Trust's vision which is to:

'Raise a family of Great schools that provides every pupil with the best start in life.'

The Trust is built on efficient, effective and resilient structures and processes that ensure everyone has the resources they need to make a difference in the lives of our communities.

The purpose of the Estates Vision is to provide a clear statement of the objectives and methods employed by Brontë Academy Trust to ensure its buildings and land support the Trust's Vision and strategic priorities whilst preserving asset value.

The Estates Vision and Strategy is based on the Good Estates Management of Schools (GEMS) a government document to help guide and support schools and responsible bodies manage their estate.

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

Estates Vision:

We will:

- invest in our buildings to ensure they remain: safe, accessible spaces in our community where every child gets the best start in life.
- provide safe, secure and stimulating learning environments with reduced environmental impact on both resources and emissions providing compliant, environmentally friendly spaces fit for future generations.
- remove some operational bureaucracy which comes with managing a school and centralising core tasks in H&S, capital funding, compliance, and efficiencies. This will release time for school staff and leaders to concentrate on providing 'Great Schools'.

BAT ESTATE STRATEGIC PLAN

Aims

- BAT strives to deliver great places to learn and teach in, inside and outside.
- We want to ensure each premises within our family of schools can deliver our educational vision to the highest standard.
- Bringing all our premise plans into one easily accessible place.
- 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.
- Identifying areas to make financial savings through centralised procurement.
- Allowing local autonomy in strategic delivery at school level.
- 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.

Areas of work to fulfil the strategy (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 environments are 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.
- **Strategic procurement:** By removing some of the operational bureaucracy and by centralising core tasks in H&S, digital procurement, capital funding, compliance and efficiencies, we plan to deliver economies of scale and lift the burden on /Senior Leadership Teams allowing strategic economies across the Trust.

How we will deliver (Implementation)

School Investment:

- Explore revenue funding reserves in support of capital investment
- Monitor and apply for grant funding opportunities
- Explore Public Sector Decarbonisation Scheme (PSDS) and SALIX loans across the Trust
- Explore condition data collection in support of prioritisation of CIF funding
- 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.
- Monitor and apply for grant funding opportunities

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 checks
- Support of Caretakers and Estates Lead to monitor and maintain safe secure premises
- Review the site security measures in place around evacuation and lockdown practices and procedures
- 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 cyclical redecoration programmes in place and budgeted through revenue funds, both internal and external.
- Ensure data available across the Trust on condition, fire compartmentalisation, floor plans
- Review all schools Published Admission Number (PAN)/Net capacity and suitability assessments are relevant and accurate
- Review accessible provisions across the Trust (toilets, level access, lift provision, hearing induction loops etc.)

Strategic Procurement:

- Identifying areas that schools would like to see centralised across Trust schools
- Procure Condition Surveys Trust wide on a phased basis
- Procure plans of all sites Trust wide for evaluation and monitoring/identification of services
- Digital procurement is centralised and frameworks are utilised to ensure best value

What success will look like (Impact):

School Investment:

- Full understanding of funding limitations and shortfalls in prioritising delivery of capital investment across the Trust
- Full in year allocation and expenditure of CIF capital funding
- Statutorily compliant buildings across the Trust
- Fully approved and audited capital expenditure
- H&S compliant buildings across the Trust
- Condition data collection in place to support prioritisation of capital allocation
- Successful grant applications to support building need through decarbonisation/SALIX and other private bodies.
- Digital estate that maintains re-investment to keep pace with technological advancements

Safe and secure buildings:

- Positive monitoring and feedback from staff and pupils following contracted works
- Ongoing evaluation of risks, H&S and statutory compliance through the ' compliance tool identifying good practices in place across the Trust
- Trust wide evaluation of evacuation, invacuation and lockdown practices
- 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 from Estates and risk and finance committee

Schools fit for purpose:

- Data available across the Trust on condition, fire compartmentalisation, floor plans
- Schools confirm their premises are accessible to all, and disabled staff and pupil numbers increased.
- Proper planning in place for cyclical maintenance within revenue budgets
- Decarbonisation plan in place for the Trust
- Applications made for future capital grants to support Trust initiatives
- A 21st century environment is maintained

Strategic Procurement:

- Cost savings through central procurement in place for Trust wide activities (e.g. fire equipment testing) led by Estates Lead and CFO
- Building data available in plan and report format for all schools (water / energy)
- Centralised digital procurement realises value for money

ASSET MANAGEMENT PLAN

The Estate Asset Management Plan sets out the short, medium and long term actions to be undertaken by the Trust to assist with the achievement of the Trust's aims and vision.

Short Term (next 12 months)

- Maintain all buildings in a condition which is consistent with Trust objectives and the trust's service delivery needs.
- Ensure buildings, services and grounds comply with legislation and are kept in a safe condition thereby mitigating the trust against potential claims in respect of negligence and statutory non-compliance matters.
- Ensure the planning, procurement and delivery of maintenance and capital works projects achieves value for money in line with the Trust's Finance Policies and the Academy Handbook.
- When undertaking maintenance, replacing or renewing faulty items, consideration should be given to reducing carbon emissions and improving energy efficiencies wherever possible across the trust.
- Review condition surveys for each site annually to prioritise and plan works according to need and schedule timetable of works forward 12 – 18 months

Medium Term (1- 3 years)

- Review individual academy needs annually based on pupil numbers and building net capacity.
- Monitor and track sufficiency and future sufficiency to ensure that all the sites align with the number and types of school places the the community needs
- Investigate developing a nursery at Haworth to ensure quality early years provision available to the local community
- Investigate all potential opportunities to further develop the school site at Haworth: including the forest area and the all weather sports pitch
- Investigate the potential sale of the field at Oakworth school
- Investigate renting Treetops and the caretaker bungalow
- Ensure all capital works projects create suitable environments which enhances the staff and pupil experience whilst maximising energy efficiencies
- Review energy prices in the wider market on a minimum 3 yearly basis to ensure value for money.

Long Term Strategic Plan (3 - 5 years)

- Renew condition surveys every 5-7 years using an external professional body to manage the condition of the sites to ensure they are safe, secure and fit for purpose
- Seek long term financial investment via CIF funding for capital projects to ensure the suitability of the schools
- Ensure that premises investment align with the number and types of school places the community needs
- Consideration to be given to reducing energy consumption and moving towards being a carbon neutral trust at every opportunity.

SUPPORTING POLICIES / REFERENCES

Policies:

- [Asset Management Policy](#)
- [Business Continuity Plan](#)
- [Tendering and Procurement Policy](#)
- [Financial Procedures Policy](#)

References:

- <https://www.gov.uk/guidance/good-estate-management-for-schools>
- <https://www.gov.uk/guidance/good-estate-management-for-schools/the-fundamentals-of-goodestate-management>
- https://assets.publishing.service.gov.uk/media/5f8468c3d3bf7f6ba6e77af1/A_guide_to_strategic_estate_documents.pdf
- <https://www.gov.uk/guidance/good-estate-management-for-schools/tools-and-checklists>

