



KING EDWARD VI FOUNDATION BIRMINGHAM

Educational excellence for our City

Estate Management Policy

Responsible Board/Committee	Academy Trust Board
Policy Type	Central Policy (Group A)
Policy Owner	Head of Estates and Sustainability
Statutory	No
Publish Online	Yes
Last Review Date	N/A
Review Cycle	Three Yearly This policy will not expire but will be reviewed as per its designated cycle. This policy remains effective whilst the review is taking place and will only become non-applicable once the updated version has been approved.
Next Review Date	Sep. 2028
Version	v1.0

1. Introduction

The Estate Management Policy for King Edward VI Academy Trust Birmingham sets out a strategic framework for the management, maintenance, and development of the Trust's physical assets, including school buildings, grounds, and facilities. This policy ensures that the estate supports the Trust's educational objectives, providing a safe, inspiring, and sustainable environment conducive to learning and the well-being of pupils, staff, and visitors.

As an Academy Trust comprising of twelve schools, both selective and comprehensive, each with unique needs and challenges, it is essential to have a consistent and structured approach to managing the estate. This policy aligns with our vision and values, guiding decisions on property maintenance, space utilisation, sustainability, and long-term planning. It also ensures compliance with legal, regulatory, and safety standards, safeguarding the Trust's assets and supporting our commitment to providing high-quality education.

By establishing clear responsibilities, financial strategies, and risk management processes, this Estate Management Policy seeks to deliver an estate that is not only functional and well-maintained but also forward-thinking, adaptable to changing needs, and environmentally responsible. The policy aims to ensure the Trust's physical resources contribute positively to the overall educational experience while maintaining transparency and accountability at all levels of estate management.

This document will be reviewed regularly to reflect changes in legislation, best practices, and the evolving needs of the Trust.

2. Scope

This policy covers:

- All Academy Trust Schools.
- All land and buildings owned, leased, or managed by the Trust.
- Fixed assets and infrastructure, and mechanical systems.
- Grounds maintenance and external spaces.
- Statutory compliance, planned and reactive maintenance.
- Capital improvements and lifecycle planning.
- Environmental sustainability and carbon management.

3. Aims and Objectives

3.1 Aims

The primary aim of the Estate Management Policy is to ensure that the Trust's physical estate is managed effectively and efficiently to support the educational mission of the Trust. This policy aims to provide a strategic approach that ensures our estate is safe, sustainable, and flexible to meet the needs of the schools and their communities, both now and in the future. Specifically, the policy seeks to:

- 3.1.1 Support educational excellence: Ensure the physical environment fosters high-quality teaching and learning for all pupils across the Trust's schools.
- 3.1.2 Ensure legal and regulatory compliance: Maintain compliance with all relevant laws, regulations, and statutory requirements concerning property management, health and safety, and environmental standards.
- 3.1.3 Promote sustainability: Encourage environmentally sustainable practices in the management and development of the estate, including energy efficiency and resource conservation.
- 3.1.4 Maintain safety and wellbeing: Provide safe, secure, and accessible environments for all users, ensuring the wellbeing of pupils, staff, and visitors.
- 3.1.5 Enhance operational efficiency: Manage the Trust's estate in a way that maximises value for money, minimises operational costs, and ensures the longevity of assets.
- 3.1.6 Support long-term strategic planning: Develop a flexible estate strategy that can adapt to the evolving needs of the Trust, including future school expansions, improvements, and potential property acquisitions or disposals.

3.2 Objectives

To achieve these aims, the Estate Management Policy sets out the following specific objectives:

3.2.1 Asset management and maintenance:

- Ensure that all buildings and facilities are regularly maintained and kept in good condition through a structured planned preventative maintenance (PPM) programme.
- Maintain up-to-date asset management plans (AMP) for each school.
- Maintenance and upkeep of our estate to provide a consistently good standard of accommodation across all Trust schools.
- Conduct regular condition surveys of all Trust buildings and assets to assess their current state, identify potential maintenance or repair needs, and inform prioritisation of investment. These surveys will provide essential data to guide decision making regarding refurbishment, repairs, and asset replacements, allowing for proactive rather than reactive management.

3.2.2 Health, safety, and risk management:

- Prioritise the safety of all individuals within the Trust's estate by conducting regular health and safety audits, risk assessments, fire drills, and lockdown drills.
- Ensure that all health and safety requirements, including accessibility and safeguarding standards, are consistently met and reviewed.

3.2.3 Sustainable practices and environmental responsibility:

- Introduce initiatives to reduce the Trust's carbon footprint, including energy-efficient heating and cooling systems, sustainable building materials, and waste reduction strategies.
- Encourage the use of renewable energy sources where feasible and integrate sustainability into future construction or refurbishment projects.

3.2.4 Space optimisation and flexibility:

- Review and analyse net capacity assessments (NCA's) to ensure that the physical space in each school is used efficiently, allowing for flexible learning environments that can adapt to changes in educational practices or demographic shifts.
- Develop strategies to accommodate growing or fluctuating student populations across the Trust's schools.

3.2.5 Financial management and budgeting:

- Develop clear and accountable financial strategies for the management and maintenance of the estate, ensuring that resources are allocated effectively and budgets are adhered to.
- Identify opportunities to generate income from the estate (e.g. lettings income) to support the Trust's financial sustainability.

3.2.6 Stakeholder engagement and communication:

- Involve relevant stakeholders (such as staff, parents, local authorities, and community members) in decision-making processes regarding the estate.
- Maintain transparent communication about estates-related decisions, including any planned developments, refurbishments, or maintenance work.

3.2.7 Long-term planning and development:

- Create a long-term estate strategy that supports the Trust's future needs, including expanding school capacity, refurbishing outdated facilities, and developing new buildings or amenities as required.
- Regularly review and update the strategy to ensure it remains aligned with the Trust's goals and changing external factors, such as funding opportunities or local government planning initiatives.

3.2.8 Monitoring and Review:

- Implement a system of regular monitoring and reporting to assess the effectiveness of the Estate Management Policy and make adjustments as necessary.
- Ensure the policy is reviewed periodically to keep it relevant and responsive to the evolving needs of the Trust and its estate.

By achieving these objectives, the Estate Management Policy will ensure that the Trust's estate is managed in a way that supports both current operational needs and long-term educational aspirations, creating a positive impact on the learning experience and ensuring the sustainability of resources for future generations.

4. Governance and Responsibility

Effective governance and clear allocation of responsibilities are essential for the successful management of our estate. This section of the Estate Management Policy outlines the key roles and responsibilities across the Trust to ensure that all estates-related activities are carried out efficiently, transparently, and in alignment with the Trust's educational goals.

4.1 Board of Trustees

Responsibility:

The Board of Trustees is ultimately accountable for the strategic direction and oversight of the Trust's estate management. They ensure that the estate strategy aligns with the Trust's vision, mission, and educational objectives while ensuring compliance with all relevant laws and regulations.

Key Responsibilities:

- Approve the Estate Management Policy and any significant changes to it.
- Oversee the long-term strategy for the Trust's estate, ensuring that estates management supports the Trust's goals and budget.
- Ensure that adequate resources (financial and personnel) are allocated to estates management.
- Regularly review the performance of estates management, including reports on condition surveys, maintenance plans, and key performance indicators (KPIs).
- Ensure that the estate is managed in a way that ensures the health, safety, and wellbeing of staff, pupils, and visitors.

4.2 Finance and Estates Committee

Responsibility:

The Finance and Estates Committee provides assurance to the Board of Trustees that estates management is effectively monitored and controlled, including overseeing risk management and compliance with legal and regulatory standards.

Key Responsibilities:

- Review and monitor the effectiveness of the estate's risk management processes.
- Ensure that condition surveys and maintenance plans are being implemented as per the policy.
- Monitor the implementation of the estates budget and ensure that it is being used efficiently.
- Assess the adequacy of internal controls relating to estates management and ensure that audits are conducted regularly.

4.3 Chief Executive Officer (CEO)

Responsibility:

The CEO is responsible for the operational leadership of the Trust, including overseeing the

implementation of the Estate Management Policy. They provide leadership to ensure that the estate is managed in line with the Trust's strategic vision and goals. In practice, the estate oversight is delegated to the Chief Finance Officer.

Key Responsibilities:

- Ensure that the estate strategy is aligned with the Trust's overall objectives.
- Report regularly to the Board of Trustees on the status of the estate, including key issues arising from condition surveys, maintenance needs, or emergency repairs.
- Coordinate with other senior leadership roles to ensure estates management aligns with educational and operational needs.

4.4 Chief Finance Officer (CFO)

Responsibility:

The CFO acts as the financial steward of the estate, ensuring strategic and operational decisions are financially sound, compliant and aligned with the Trust's broader objectives. They bridge the operational management of the estate and the strategic oversight of the Board, ensuring value, risk mitigation, and long-term sustainability.

Key responsibilities:

- Ensure the estate management policy aligns with the Trust's overall strategic objectives and financial strategy.
- Allocate and monitor budgets for estate management, capital works, and sustainability initiatives.
- Report on estate-related expenditures and investments to the Board, Finance and Estates Committee, and regulator as required.

4.4 Head of Estates and Sustainability

Responsibility:

The Head of Estates and Sustainability is responsible for the operational management of the Trust's estate, including overseeing maintenance, health and safety, and long-term planning. This role ensures that all estates-related activities are carried out in a way that aligns with the Trust's strategy and operational needs.

Key Responsibilities:

- Develop and implement the Estate Management Policy, including the scheduling of regular condition surveys, maintenance, repairs, and refurbishment projects.
- Oversee the planning and execution of capital projects, including renovations, refurbishments, and expansions.
- Ensure compliance with health and safety regulations, safeguarding policies, and environmental standards across the estates.
- Has oversight of the estates budget, ensuring that resources are allocated appropriately and efficiently.

- Maintain detailed records of condition surveys, maintenance schedules, repairs, and inspections.
- Coordinate with external contractors, suppliers, and consultants as needed to ensure estates-related work is carried out effectively and efficiently.
- Provide regular updates to the CEO and the Board of Trustees on the condition of the estate, key risks, and any significant issues.

4.5 School Headteachers

Responsibility:

Headteachers are responsible for ensuring that the school's specific estate needs are addressed in line with the broader Trust-wide policy. They play a vital role in identifying and reporting issues that impact the day-to-day operations of the school.

Key Responsibilities:

- Report any immediate estates-related concerns or maintenance needs to the Head of Estates and Sustainability.
- Work with the Head of Estates and Sustainability to ensure that the physical environment meets the needs of the school's educational activities.
- Ensure that the health, safety, and wellbeing of pupils and staff are prioritized within the school's estate.
- Participate in the planning and implementation of local improvement projects, including the allocation of space for learning activities and any necessary refurbishments or upgrades.

4.6 Estates and Site Managers (Cluster or School-Level)

Responsibility:

Estates and Site Managers are responsible for the day-to-day maintenance, cleanliness, and safety of the school's estate. They directly oversee operational tasks such as maintenance, cleaning, security, and minor repairs.

Key Responsibilities:

- Oversee the day-to-day management of the estate and the implementation of the policy.
- Carry out regular inspections of the school's estate to identify any maintenance or safety issues.
- Ensure compliance with daily operational health and safety requirements, including managing risks related to the physical environment.
- Coordinate with external contractors for repairs and maintenance tasks as necessary.
- Implement and monitor routine PPM schedules to ensure that buildings are kept in good condition.
- Maintain up to date asset management plans (AMP).
- Report issues and escalate significant concerns to the Head of Estates & Sustainability or Headteacher as needed.
- Budgeting and budget management.

- Site development plans.
- Act as the local project lead.

5. Legal and Regulatory Framework

The Trust will comply with all relevant legislation and statutory guidance, including but not limited to:

- Health and Safety at Work Act 1974
- The Regulatory Reform (Fire Safety) Order 2005
- Control of Asbestos Regulations 2012
- Lifting Operations and Lifting Equipment Regulations (LOLER)
- Control of Substances Hazardous to Health (COSHH)
- Workplace (Health, Safety and Welfare) Regulations 1992
- Management of Health and Safety at Work Regulations 1999
- Construction (Design and Management) Regulations 2015
- Equality Act 2010 (in relation to accessibility)