

BDAT STRATEGIC ESTATES VISION

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Contents

Introduction:	3
Executive Summary:	3
Estates Strategy:	3
Aims:	4
Objectives:	4
Measuring Performance:	4
Managing Our Estate:	5
Managing Statutory Maintenance	5
Sustainability and Solar Investment:	6
Annual solar investment	6
Onboarding new academies	6
Digital Onboarding and Funding	6
Funding Sources:	6
Devolved Formula Capital Funding (DFC)	6
School Condition Allocation (SCA)	7
Emergency Contingency Funding Requirements	7
Governance:	8

Introduction:

This document sets out how BDAT will manage the Trust estate to achieve the BDAT Estates Vision. The Estates Strategy provides the framework and direction by which our Estate Vision will be delivered, and set out over a 10 year period, whilst being reviewed every 5 years for relevance.

BDAT are guided by the DfE's Good Estate Management for Schools document (GEMS) which sets out the fundamentals of best practice of estates management in education settings.

The Estates Strategy is underpinned by the BDAT Climate Action Plan and 10 Year Building Management Plan.

Executive Summary:

BDAT Vision	Every student in a BDAT academy gets a happy and high-quality education enabling competence, confidence and character to thrive; and that our academies become the schools of choice in Bradford			
Estates Vision	BDAT Staff, Pupils, and Visitors will benefit from: • A safe, warm, and well-lit learning environment: • A building that has been, and continues to be cared for. • A building that is compliant with the latest legislation and regulations. • A building that considers the consumption of energy, that limits & improves the impact on the environment. • A building that has its occupants at heart and meets their needs. • A building that works for its users.			
Strategic Aims	BDAT will support each academy within the Trust to deliver the Estates Vision to the highest standard with the resources available by investing in CPD, encouraging collaboration and adopting innovative building technology.			
	BDAT will have a 10-year plan for capital and revenue expenditure across the Trust, reflecting the outcomes of school condition surveys and third-party statutory assessments.			
	BDAT will aim reduce carbon emissions and reach net zero by 2050.			
Objectives	Compliance	Efficiency	Best Value	Modernisation
Action Plans	10 Year Building Management Plan		3-year Climate Action Plan	
Policies	School Condition Allocation Policy		Digital Policy	

Estates Strategy:

Our Strategy outlines the comprehensive plan for the development and management of Academy Estates. The strategy aims to provide a roadmap for achieving the vision of creating a conducive environment for learning, innovation and community engagement.

This document will be developed and agreed with Trustees and reviewed every 5 years to check relevance and compliance.

The BDAT Estates Strategy highlights what the aims and objectives of the estates function are. Our over-arching goal is to provide an enhanced level of “safe, warm and dry”, as quoted in the DFE’s ‘Good Estates Management’ document.

Aims:

BDAT will support each school within the Trust to deliver our Estates Vision to the highest standards within the resources available by investing in continued professional development, encouraging collaboration while adopting innovative building technologies and methods.

BDAT will have a 10 year plan for capital expenditure across the Trust, based on the professional, third party assessments of the condition of our estate and what is required to:

1. Make schools safe and compliant.
2. Enhance basic functionality and address moderate deficiencies
3. Modernise the estate: Refurbish classrooms and staff areas, focusing on aesthetics and ergonomics and replace old furniture and equipment impacting functionality
4. Increase capacity and improve specialist facilities
5. Strengthen community engagement and improve aesthetics
6. Reduce carbon emissions and reach net zero by 2050

Objectives:

- **Compliance:** BDAT will use key estate performance data such as condition surveys, fire risk assessments, asbestos management plans and other third party assessments to provide an overview of what input our premises need to provide a safe and secure environment which support the Estates Vision.
- **Efficiency:** BDAT will have a comprehensive climate action plan which allows the trust to reach net zero by 2050.
- **Best Value:** BDAT will identify estate performance opportunities to reduce academy estates costs, ensuring that cost savings are invested back into learning resources to improve outcomes for all students. Each scheme will benefit from a detailed specification that can lead to accurate cost comparisons. The estate will strive for uniformity of materials to ensure minimal wastage and repurposing of materials across the estate where possible.
- **Modernisation:** 25% of School Condition Allocation (SCA) funding will be available for academies to use for specific projects, allowing funds for the modernisation of classroom, staff areas and fixtures and fittings. As well as opportunities to upgrade basic functions such as heating and lighting with the most up-to-date technology.

Measuring Performance:

- All schools to receive 100% LED lighting installations by 2030
- All schools to have modern, energy efficient heating systems, including sophisticated Building Management Systems that can accurately control heating usage
- By 2031 the trust aims to remove 95% of asbestos from the current stock
- By 2030 all academies to have energy efficient windows and doors

- All schools to have detailed, customisable CAD drawings by 2030 that can be continually updated
- All schools to have a valid, approved roofing warranty, recognised by The National Federation of Roofing Contractors for each instance of roofing work undertaken. Meaning schools have a clear contact pathway for any latent defects.

Managing Our Estate

The Estates strategy will be aligned with the DfE's Good Estate Management for Schools documentation (GEMS) which sets out the fundamentals of best practice Good Estate Management for Schools

BDAT have a wide ranging and experienced team of professionals who manage the academy estate day to day. External assistance is quality assured and purchased where skills are not available within BDAT. The health and safety culture is reviewed periodically by the Head of Estates

The team ensures that there is full compliance with all health and safety regulations, and this is reviewed by the Head of Estates to ensure ongoing site compliance. This is recorded via a web based CAFM System. The 10 Year Plan allows for a percentage of funding to be set aside for statutory maintenance remedial work. This mechanism ensures the 'loop is closed' on all statutory maintenance tasks. Non-statutory maintenance and subsequent remedials is covered by local school budgets.

The Head of Estates, Academy Business Leaders and Academy Site Teams coordinate all capital project improvements and the day-to-day management of the academies in line with the BDAT Compliance Monitoring and Premises Management Procedures. Oversight will be offered to Headteachers in the form of periodic progress updates (for SCA projects) and access to the CAFM system which holds real time compliance data for their schools.

A rigorous planned preventative maintenance schedule for each academy ensures that our estate assets have the longest useful life possible and are safe to all users. Each academy has an individual Asset Management Plan detailing their particular challenges, priorities, proposed actions, timeframes and possible funding sources.

Managing Statutory Maintenance

Trust wide statutory maintenance will be covered within the BDAT central service charge. The statutory maintenance schedule will be overseen by the Head of Estates, however the implementation of the programme will be overseen at local level by the Academy Business Leaders and Site Teams.

The roll out of the Statutory Maintenance programme will be a collaborative effort, with BDAT utilising individual skills sets from the BDAT estate and leadership teams.

Procurement of the programme will be completed in conjunction with the individual academies to achieve best value.

Planned Preventative Maintenance (PPM's) will still be carried out at school level by on site estates teams. Any costs associated with site specific PPM's will be budgeted for in individual academy budgets.

Sustainability and Solar Investment:

BDAT has committed to the ambitious target of becoming carbon neutral by 2050, with four priority action areas driving this change. Full details of BDAT's environmental ambition can be seen in the BDAT sustainability strategy and 3-year Climate Action Plan.

BDAT will, where appropriate, develop capital projects aligned with the sustainability and design standards within Annex 2J of the updated School Output Specification 2023 (OS) for guidance. This can be found here: [Technical annex 2J: sustainability](#)

Annual solar investment

BDAT have committed to investing £100k per annum into the trust wide solar scheme, reducing the solar energy rate and increasing trust wide savings for academies within the trust.

Onboarding new academies

BDAT have within the 10-year plan, allowed for the onboarding of new academies into the solar scheme. This sits under the 'Energy Efficiency Tech including Onboarding' heading.

Where applicable, BDAT will work with Solar for Schools to ensure that new academies benefit from solar energy. In some circumstances it might be appropriate to agree a fully funded scheme, in this case the ringfenced fund will be used for other trust wide projects. The aim is to make sustainable energy benefit our schools across the trust wherever possible and continue to expand the existing provision, as new schools join the trust.

Digital Onboarding and Funding

All academies that join BDAT are required to join the central tenancy at the earliest opportunity. This requirement ensures that we protect schools through digital security, fire walls and cloud-based technologies.

The initial onboarding involves a significant investment in the latest digital and Wi-Fi technologies. The funding of this is firstly through any government led funding initiatives then designated digital reserves and then, via Trust reserves.

Funding Sources:

Devolved Formula Capital Funding (DFC)

DFC provides schools with capital funding to address their own priorities, such as improvements to buildings and other facilities, including ICT, or capital repairs/refurbishment and minor works.

Although the fund is held centrally, the fund is fully managed by the individual academies and should be linked to academy priorities.

Before SCA bids are considered, academies will be asked to use their DFC funding. In most cases the DFC funding will be ringfenced for ICT priorities.

School Condition Allocation (SCA)

Investment from SCA should be prioritised on keeping school buildings safe and in good working order by tackling Trust priority issues such as building condition, building compliance, energy efficiency, and health and safety issues.

BDAT will retain a significant proportion of the annual SCA fund and will use estate performance data such as condition surveys, fire risk assessments, asbestos management plans and other third-party assessments to target condition improvements and provide a safe and secure environment, supporting the Estates Vision, as set out in the schedule of priorities identified within the 10 Year Building Plan.

The 10 Year Building Plan sets out how BDAT will use SCA funding to achieve the BDAT Estates Vision based on resolving areas of critical statutory and condition based maintenance across our estate eg. Asbestos management, roofing, heating systems etc.

Although set out over a 10 year period, the 10 Year Building Plan will be agreed annually with the Finance Audit and Resource Committee (FARC) to ensure that there is adequate scrutiny on planned estate spending, it reflects the latest priority areas and the amount of funding available.

School Condition Allocation (SCA) funding will also be available for academies to use for specific projects, allowing funds for the modernisation of classroom, staff areas and fixtures and fittings. As well as opportunities to upgrade basic functions such as heating and lighting with the most up-to-date technology.

Academies will have the ability to bid into this ringfenced fund annually. Each bid will be assessed using the success criteria within the SCA policy.

The FARC will agree annual bids and schedule of approved works in line with the BDAT SCA policy. Funding decisions will be reviewed annually by the FARC to monitor effectiveness of spend and balances.

Emergency Contingency Funding Requirements

10% of the total SCA allocation each year will be set aside for funding unforeseen emergency projects that have a direct impact on school delivery. Such as.

- Water Ingress
- Total and Sudden Heating and or hot water Loss
- Disturbed Asbestos
- Toilet Loss/Drainage/Sewage Issues
- Power Outage
- Fire Related
- Structural Issue
- Gas

- Site Security/Safeguarding
- Accessibility issues

Governance:

School leaders, working with their Local Governing Body have day-to-day operational responsibility for identifying areas of estates management improvement and remedial work within their Academy, seeking advice from the Trust as required.

The BDAT board has overall responsibility for *“managing their school estate strategically and effectively and to maintain their estate in a safe working condition”* as set out in the Academy Trust Handbook. In practice, this responsibility is delegated to the BDAT Finance Audit and Resources committee who will approve the Estates Strategy, 10 Year Building Plan and allocate SCA funding each year.

This document sets out how BDAT will manage the trust estate to achieve the BDAT Estates Vision strategically. It provides the framework and direction by which our Estate Vision will be delivered. This document will be reviewed and agreed with the Finance Audit and Resource Committee every 5 years to check relevance and compliance. The review process will consider, changes in legislation, advancements in energy and sustainability technology, and building usage.