

BDAT 10 YEAR BUILDING MANAGEMENT PLAN INCLUDING SCHOOL CONDITION ALLOCATION FUNDING AND PRIORITISATION POLICY

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Introduction

Bradford Diocesan Academies Trust is required to have an appropriate plan that demonstrates the strategic use of the allocated capital funds across the estate. BDAT are required to report the capital expenditure to the ESFA during and at the end of each financial year.

BDAT will ensure that there is a consideration of any health & safety issues, property condition, environmental impact as well as any other academy improvement priorities as part of our strategic plans.

Multi Academy Trusts (MATs) with at least 5 academies and more than 3,000 students, receive a School Condition Allocation (SCA) to deploy strategically across their estate to address their priority maintenance needs, thereby providing some certainty for capital expenditure planning. Investment will be prioritised on keeping the buildings safe and in good working order by tackling poor building condition, building compliance, energy efficiency, and health and safety issues.

School Condition Allocations are based on a formula that consider the academy conditions, pupil numbers and PFI factors.

The grant must be used exclusively for capital expenditure. BDAT may carry over a total amount of SCA equivalent to 100% of its allocation, into the next financial year. Any funding carried over more than that amount will be repaid to the Department unless the Secretary of State decides to the contrary.

Estates Strategy:

The BDAT Estates 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 the best possible environment for learning, innovation, and community engagement.

The BDAT Estates Strategy highlights what the aims and objectives of the estates function are. Our overarching goal is to provide an enhanced level of “safe, warm, and dry,” as quoted in the GEMS document.

Aims:

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

BDAT will have a 10-year plan for School Condition Allocation (SCA) and other capital expenditure across the Trust, based on the professional, third-party assessments of the condition and what is required to:

1. Make academies 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 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, secure and compliant environment which support the Estates Vision.
- **Efficiency:** BDAT will have a comprehensive climate action plan which will allow 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. There will also be opportunities to upgrade basic functions such as heating and lighting with the most up-to-date technology.

10 Year Building Management Plan

BDAT will retain 75% of the annual SCA fund (which includes the funding allocation for the solar commitment and the contingency) and will use estate performance data such as condition surveys, fire risk assessments, asbestos management plans and other professional reports to target the highest priority condition improvements and provide a safe and secure environment, supporting the Estates Vision.

The 10 Year Building Management Plan is based on the most up to date condition and cost information acquired from third-party specialist building surveyors. The plan aims to profile School Condition Allocation funding over the next decade, to estimate resource needs, and drive SCA projects towards the greatest priority items, thus avoiding unforeseen breakdowns, and academy service interruptions.

The 10 Year Building Management Plan also displays BDAT's improvement ambitions and how these will need to be managed and implemented in a considered manner, to achieve maximum efficiency and benefit to the

Academy staff and students. The plan is further broken down to show which Academies benefit from what elements, within the year.

Academy Specific Projects

25% of School Condition Allocation (SCA) funding will be available for academies to use for specific local projects, allowing, for example funds for the modernisation of classroom spaces including fixtures and fittings.

Whilst pupil numbers form a determining factor behind the allocation from the DfE, the Board of Trustees recognises that the age and state of repair of each academy will not be related to pupil numbers.

Capital projects relating to the compliance, safety and condition of the buildings will be the priority criteria for any projects.

In March each year, there will be a bidding round which allocates the ringfenced 25% of SCA funding to successful schemes.

The cost of the project should include all fees (where applicable, including Diocese and statutory fees). The initial cost estimate from the contractor/consultant is to be included with the application as evidence of the project cost. Where there are several individual elements to a project (e.g. mechanical, electrical, building, decorating etc.) estimates for each part are to be included. The academy should consider allocating a contingency amount to large projects, particularly considering the recent increases to supply and material costs.

Academies should consult with the Head of Estates and Environment, prior to submission of a bid. This is to assist the academy with the preparation of specifications to ensure supplier quotes can be accurately compared during the process, and a suitable contingency is considered.

10% of the total SCA allocation each year is to be set aside for funding emergency projects that have a direct impact on academy delivery.

Environmental and Sustainability

BDAT has committed to the ambitious target of becoming carbon neutral by 2050, with four priority action areas driving this change:

1. **Decarbonisation:** Calculating and taking actions to reduce carbon emissions, such as becoming more energy efficient.
2. **Adaptation and Resilience:** Plans to reduce or adapt to risks resulting from climate change.
3. **Biodiversity:** Engaging with outdoor projects.
4. **Climate Education, Training and Jobs:** Ensuring BDAT is providing education about climate change and that teaching staff are supported to do so.

We are committed to investing in our buildings to make them more efficient, reducing our reliance on fossil fuels, investigating our supply chains and operations, reducing wastage, and encouraging sustainable travel. Full details of BDATs environmental ambition can be seen the BDAT sustainability strategy and 3-year Climate Action Plan.

BDAT will attempt, where appropriate to develop capital projects aligned with the sustainability and design standards within Annex 2J of the updated Academy 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 (7% of total SCA in Year 1) into the trust-wide solar scheme, reducing the solar energy rate and increasing trust wide savings for academies within the trust.

Review and Priorities

The 10 Year Building Management Plan is designed to be reviewed and adjusted annually to assess effectiveness. This will ensure priorities are still correct and consistent with the latest building condition surveys, as well as any changes in regulations or advances in technology.

Due to the nature and prevalence of asbestos, the management and removal of asbestos containing materials is the highest priority for our estate. The well publicised health risks of exposure, along with the likelihood of disturbance, have driven our aim to remove all asbestos materials from our estate by 2031.

Example Year One Breakdown:-

The table below sets out an example of the forecasted annual percentage allocation for the SCA fund. A detailed costed breakdown will be available for all Academies and will be ratified annually by the Finance and Resource Committee.

ANNUAL COMMITMENTS	% Allocation
Contingency/Emergency	10%
Solar	7%
Building Maintenance Priorities	58%
Trust Building Plan Total Commitment	75%
School Priority Commitment	25%

Implementing The 10 Year Building Management Plan

The relevant year of the 10-year plan will be shared with the individual academies who will have an opportunity to discuss the practicalities of the in-year proposals. This will include points such as, any other works planned by the academy locally and how contractors operate together. On spend approval from trustees, a further detailed pre-start meeting incorporating Construction Design Management will take place with academy stakeholders to ensure the project will complete in a safe and compliant way.

To accompany the pre-start meeting, a project plan will be created and tailored to the individual projects, this will show start and end dates, as well as any items along the critical path. This is for both the contractor to follow, and for information for the academy and LGB. The project plan can then be utilised as a live document to highlight any potential slippages and mitigate the response from both site and contractor.

Progress updates will be available throughout the course of the project. These will be linked to the project plan and can be agreed at pre-start stage. Stakeholders will be invited to client/contractor on site progress meetings but will not be under any obligation to attend. Notes, agreements, and queries will be communicated via email following any items of operational significance.

On completion of the scheme, stakeholders will be asked for feedback on the contractor's performance.

Assessment of Academy Applications

BDAT will allocate funds to ensure all academies have an up-to-date Condition Survey. The surveys will estimate costs for the various works identified and prioritise on a scale from immediate to 5+ years. Most of this priority work will be covered within the 10-year building management plan using the retained 75% of SCA funding.

BDAT recognise that academies will have projects that they would like to undertake that might be linked to their own development plans and may not be categorised within the 10-year building management plan. Therefore, an annual opportunity to bid for academy specific projects will be offered.

The cost of the project should include all fees (where applicable, including Diocese and statutory fees). The initial cost estimate from the contractor/consultant is to be included with the application as evidence of the project cost. Where there are several individual elements to a project (e.g. mechanical, electrical, building, decorating etc.) estimates for each part are to be included.

Academies should consult with the Head of Estates, prior to submission of the application. This is to assist the academy with the preparation of specifications and the gathering of pre-construction information from the identified contractor. This is to ensure that the trust has assurance that all CDM requirements of each project are met and also to ensure supplier quotes can be accurately compared during the process.

BDAT will assess each bid application using the information contained within the SCA Project Form, as well as a site visit from the Head of Estates if necessary. Each application will be scored, based on a maximum

possibility of 170 points. The priority of the bid will be used as a baseline and additional points scored if certain criteria are met.

The academy should consider allocating a contingency amount to large projects, particularly considering the recent increases to supply and material costs.

Each bid will be fully evaluated by the CFO and decisions based on four main categories:

Category	Points	Total Points Awarded
Building Condition & Urgency		60
Structural Integrity & Safety (20 points): Assesses the severity of structural issues (e.g., roof damage, foundation problems, critical repairs).	20	
Health & Safety Compliance (20 points): Evaluates whether the school meets health and safety regulations (e.g., asbestos removal, fire safety).	20	
Impact on Daily Operations (20 points): Determines how much the current condition affects learning (e.g., overcrowding, operational space etc).	20	
Sustainability & Environmental Impact		40
Energy Efficiency Improvements (25 points): Measures proposed energy efficiency upgrades (e.g., LED lighting, solar panels, insulation).	25	
Sustainable Materials & Construction (10 points): Considers the use of eco-friendly and low-carbon materials.	10	
Long-Term Environmental Benefits (5 points): Evaluates the projected reduction in carbon footprint and environmental sustainability.	5	
Social & Educational Impact		25
Student & Staff Well-Being (10 points): Assesses the expected impact on student and teacher health, morale, and productivity. (EHCP Plans etc)	10	
Accessibility & Inclusivity (10 points): Ensures that improvements promote accessibility (e.g., ramps, lifts, sensory-friendly spaces).	10	

Community Use & Engagement (5 points): Considers how the improvements benefit the wider community (e.g., shared sports facilities, adult education).	5	
Cost-Effectiveness & Financial Considerations		45
Budget Efficiency & Value for Money (10 points): Evaluates how well the proposed costs align with the impact and necessity of improvements.	10	
Long-Term Maintenance & Durability (5 points): Considers the sustainability of the investment (e.g., low-maintenance materials).	5	
Co-Funding or External funding Support (30 points): Awards points for securing additional funding sources, reducing financial reliance on the trust.	30	

Bids will be ranked based on their total score out of 170, with priority given to projects that demonstrate:

- High urgency and necessity.
- Strong sustainability initiatives.
- Significant social and educational benefits.
- Cost efficiency and long-term durability.

Minimum bid thresholds for Academy-level SCA Applications

The minimum bid threshold for Academy level bids will be £2,000.

Emergency Contingency

Planned improvement and replacement is the primary aim for SCA funds, however there will be occasions when outright failure occurs, and emergency work is required. For this reason, a contingency for emergency work that has not been planned for will be retained at all times during the funding cycle. Emergency's will be classified as instances which immediately affect the academy service delivery, such as:

- Total and sudden Heating and or Hot Water Loss
- Water Ingress
- Disturbed Asbestos
- Toilet Loss/Drainage/Sewage Issues
- Power Outage

- Fire Related
- Structural Issue
- Gas
- Structural Compromise
- Site Security
- Accessibility issues

Procurement

For clarity, the conditions for procurement are laid down in the BDAT Finance Policy and Financial Procedures Manual.

The Trust wants to achieve the best value for money from all our purchases. This means we want to get what we need in the correct quality, quantity, and time at the best price possible. A considerable proportion of their purchases will be paid for with public funds and we need to maintain the integrity of these funds by following the general principles of:

- **Probity:** *it must be demonstrable that there is no corruption or private gain involved in the contractual relationships of the Academy.*
- **Accountability:** *the Academy is publicly accountable for its expenditure and the conduct of its affairs.*
- **Fairness:** *that all those dealt with by the Academy are dealt with on a fair and equitable basis.*

To maintain central control of the funds, once announcement of allocations has been received, the Academy Business Leader must make appropriate arrangements to obtain competitive quotations. Orders must not be placed until full approval is in place. Orders will be placed by the central finance team.

Assurance requirements for Academy-Level SCA Projects

To ensure compliance with statutory obligations under the Construction (Design and Management) Regulations 2015 (CDM) and to maintain robust health and safety standards, the Trust requires academies to provide assurance that all CDM requirements have been met for projects funded through School Condition Allocation (SCA).

Academies must complete the School Level Approved SCA Projects – Assurance Checklist (Appendix 1) and submit it to the Trust prior to project commencement and then upon project completion. This checklist provides confirmation that:

- A Principal Designer and Principal Contractor have been appointed in accordance with CDM regulations.
- Risk Assessments and Method Statements (RAMS) have been obtained and reviewed.

- Contractor competence and insurance have been verified (e.g., CHAS accreditation).
- The Trust has been notified of project start dates and duration, including any HSE notifiable projects.
- Regular site inspections and updates to the Health and Safety file have been undertaken during the construction phase.
- All post-construction documentation (operating manuals, warranties, completion certificates) have been collected and uploaded to the designated SCA folders.

Purpose of Assurance

These assurances are required to:

- Demonstrate CDM Compliance - confirm that legal duties under CDM regulations have been fulfilled by the academy and its appointed contractors.
- Protect Health and Safety - ensure that risks to staff, pupils, and contractors are effectively managed throughout the project lifecycle.
- Maintain Governance and Accountability - provide the Trust with documented evidence of compliance, enabling oversight and reducing liability.
- Support Audit and Reporting - facilitate accurate record-keeping for internal audits and external regulatory reviews.

Academy Level Project Requirements for SCA Projects

The table below applies to all Academy-Level projects for which SCA funding has been successfully bid and approved by the Trust.

Function	Delegated To	Accountable To	Notes
Project Management & Delivery	Academy Business Leader (ABL)	Headteacher / BDAT Head of Estates	ABL leads day-to-day delivery and coordination.
Procurement of Goods & Services	Academy Business Leader	BDAT Finance Team	Must follow BDAT Finance Policy and procurement thresholds.
Budget Monitoring & Reporting	Academy Business Leader	Headteacher / BDAT Finance Team	Regular updates to Headteacher on progress of works. Any overspend must be escalated to Deputy Chief Financial Officer.

Function	Delegated To	Accountable To	Notes
Health & Safety File Maintenance	Academy Business Leader	BDAT Head of Estates	Must include risk assessments, method statements, and any incident logs.
Compliance with CDM Regulations	Academy Business Leader	BDAT Head of Estates	ABL ensures all CDM duties are fulfilled or delegated appropriately.
Gathering Operating Manuals & Certificates of Works	Academy Business Leader	BDAT Head of Estates	To be submitted to BDAT upon project completion.
Contractor Management	Academy Business Leader	BDAT Head of Estates	ABL ensures contractors are vetted and compliant.
Stakeholder Communication (School Level)	Academy Business Leader	Headteacher	Includes staff, governors, parents and local community where relevant.

Key Responsibilities of the Academy Business Leader

- Develop project specification, timelines, and appoint a contractor at a local level.
- Engage suppliers/contractors in line with BDAT's procurement policy.
- Maintain a health & safety file and complete the School Level Approved SCA Projects – Assurance Checklist.
- Collect and submit all manuals, warranties, and certificates to BDAT.
- Provide regular updates to school leadership.
- Report to BDAT when the project is complete (including all snagging works) and the relevant invoice can be paid.

Oversight & Escalation

BDAT Head of Estates retains strategic oversight and may intervene if:

- Project risks escalate.
- Compliance breaches occur.
- The approved budget for the works is or is projected to be exceeded.

Governance

10-year Building Management Plan

This document sets out how BDAT will use SCA funding to achieve the BDAT Estates Vision. Although a ten year plan, this will be agreed annually with the Finance and Resources Committee FARC to ensure that there is adequate scrutiny on planned estate spending.

SCA Bidding Schemes

The Finance and Resources Committee (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.

Appendix 1

School Level SCA Project			
Assurance Checklist for Academy Business Leaders			
Action	Response (drop down options)	Notes (add relevant details for each section i.e. names	Guidance
Pre-construction phase			
Has a principle designer been appointed?			This could be the ABL if you have designed the project. This could be the principle contractor if they have designed a solution.
Has a principle contractor been appointed?			
Have you received RAMS from the appointed principle contractor?			Request these from you're appointed contractor and upload these to the H&S folder for your project within BDATs SCA folder
Have you verified contractor competence through accreditations i.e. CHAS?			Request these from you're appointed contractor and upload these to the Pre-construction folder for your project within BDATs SCA folder
Have you verified contractor insurance?			Request these documents from you're appointed contractor and upload these to the Pre-construction folder for your project within BDATs SCA folder
Have you notified BDAT Head of Estates of your project start date and proposed duration of works?			Any project over 500 working days is notifiable under HSE guidelines.
Construction phase			
Have you conducted regular site inspections during the works?			Record any observations/concerns relating to contractor conduct/adherence to RAMS
Have you maintained your Health and Safety file throughout the works?			Record if RAMS have needed to be update or if there have been any incidents that have required investigation.
Post Construction phase			
Have you collected all relevant operating manuals and warranties?			Request these from you're appointed contractor and upload these to the Post-construction folder for your project within BDATs SCA folder
Have you obtained certificates of work/works completion documentation?			Request these from you're appointed contractor and upload these to the Post-construction folder for your project within BDATs SCA folder
Have you completed a final update on your Health and Safety file?			Request these from you're appointed contractor and upload these to the Post-construction folder for your project within BDATs SCA folder
Have you completed all snagging works and notified BDAT Head of Estates and the BDAT Finance Team of the completion of works?			