



# DEVELOPING THE OPTIMUM LEARNING ENVIRONMENT

When the Department for Education (DfE) and the Education and Skills Funding Agency (ESFA) published their Good Estate Management for Schools (GEMS) online resource tool in April 2018, their objective was to help school leaders and those with responsibility for the running of their estate to develop the optimum learning environment for their pupils.



Roy Pett





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Roy Pett, Director at Surveyors to Education (S2e), highlights the importance of good estate management. "GEMS sets out the policies, processes and documents that schools, academies and multi-academy trusts (MATs) should consider when managing their estates and emphasises the link between strategic estate management, maintenance and improvement, and increasing levels of pupil attainment."

### Understanding the state of your estate

Before obtaining or allocating funds for improvements, you must understand the current condition, utilisation and sufficiency of the land and buildings to identify what improvements are required, their priority and cost. A good starting point is to review your Property Data Survey (PDS) or more recent Condition Data Collection (CDC) Survey, both of which provide information on the condition of your buildings and set out the priority of capital works required.

However, neither the PDS nor CDC programs were designed to replace a detailed condition survey carried out by a qualified Chartered Building Surveyor. Condition surveys are more technical, intrusive assessments that provide a detailed, systematic, uniform and objective assessment of the buildings.

### Funding sources

Each year the Government, through the ESFA, makes funding and grants available to academies and schools for the capital required to complete projects. They include:

- **Devolved Formula Capital Funding:** This is calculated on a formulaic basis for academies and schools to maintain their buildings and grounds and fund small-scale capital projects, including ICT.
- **Condition Improvement Funding:** In 2019, £433 million was made available for 1,412 projects across 1,209 academies and sixth forms across the country. Operating as an annual bidding round for academies and smaller multi-academy trusts (MATs) (with fewer than five academies or 3,000 pupils), it addresses significant condition needs but also supports a small proportion of expansion projects.

## TOP TIPS:



**Understanding the physical condition of your estate will help you:**

- identify areas of non-compliance with health and safety regulations
- prioritise remedial work and maintenance plans, and
- provide crucial documentary evidence when applying for, or prioritising, funding.

### FUNDING IN 2019

**£433  
MILLION**

FOR 1,412 PROJECTS  
ACROSS ACADEMIES  
AND SIXTH FORMS

**£237  
MILLION**

TO MATs WITH AT  
LEAST 5 ACADEMIES  
OR >3000 PUPILS

- **School Condition Allocation:** Funds are automatically granted to MATs with at least five academies and/or more than 3,000 pupils to keep buildings in good condition, safe and in good working order and to carry out priority maintenance. In 2019/20, £237 million was made available.

There are additional funds available for condition improvement, such as the Urgent Capital Support Fund, Operating Leases and, if a new development is being built, Section 106 funding, all of which can be procured to support improvement and expansion projects.

When funding has been obtained, it is important that you have the right skills at your disposal to complete the project successfully. GEMS recommends employing a Chartered Building Surveyor to provide a detailed project specification, cost estimate and project plan. Having a qualified professional who understands the school's estate strategy will ensure that all project requirements are documented and understood and that a construction process has been developed that complies with all construction, design and management regulations. ■

**Surveyors to Education help schools and academies develop the optimum learning environment for pupils. However, there are other organisations offering similar services, so ensure you research the market thoroughly before procuring services.**