

What is a condition survey and why is it important?

A brief guide



What is a condition survey and why is it important? - a brief guide

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1. Introduction

Why have we created this guide?

There are so many competing demands on your resources. To ensure you can achieve the **vision** you have for your estate, make sure you are **statutory compliant** and create the **best learning environment** for your students, you need to prioritise the maintenance work you carry out on your buildings.

A condition survey provides crucial information for your Asset Management Plan (part of the Department for Education's guidance on Good Estate Management for Schools, known as GEMS) to make **best use of your budget** and **keep pupils, staff and visitors safe**.

It is also the first step towards **applying for government grants** for vital repair and preventative work.

With the help of Surveyors to Education (S2e), a comprehensive condition survey can **unlock the full potential** of your estate.

We hope you find it useful!

The Surveyors to Education Team



"S2e are long term partners who work with us every year and deliver without fail."

Tony Rogers, Facilities Manager
Aston Manor Academy

2. What is a condition survey?

An inspection to identify the scope and priority of works

A condition survey is a visual inspection carried out by qualified chartered building surveyors to provide objective information about the physical, mechanical and electrical condition of your buildings.

It will identify any urgent health & safety risks, but it is also an investment that allows you to anticipate maintenance needs and costs rather than simply reacting when something goes wrong.

Condition surveys usually cover a period of 3-5 years and help identify the scope and priority of works: immediate repairs along with future maintenance, decoration and renewal of each part of your estate.

With your completed condition survey you can draw up a Planned Maintenance Programme (PMP) with budgets and timings, year by year, for each element that will need attention.

“We are extremely pleased we had S2e on board to deliver these difficult projects on time and within budget. They showed the high standards and attention to detail that they are so widely renowned for.”

*Christopher Punter, Services Director
East Midlands Education Trust*

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3. Why is a condition survey important?

Poor or irregular maintenance of buildings can result in:

- disruption of education
- closure or partial closure of your buildings
- invalidation of your insurance
- poor value for money
- shorter building life
- unnecessary expenditure to rectify problems
- risks to the health, safety and welfare
- legal claims



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3. Why is a condition survey important? (cont.)

Condition surveys will help you to:

- identify what work is needed when
- consider how much works might cost
- prioritise work within available funds
- rectify compliance breaches
- identify health & safety issues
- enhance the learning environment
- plan preventative maintenance
- spread costs over a chosen period
- obtain funding



“S2e are always available, communications are unfailingly smooth, and we have complete trust in their expertise as they manage the considerable challenges that can arise with our 31 academies.”

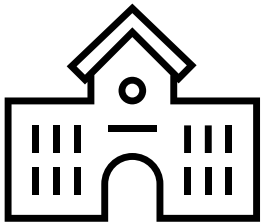
*Duncan Mills, CEO
Peterborough Diocese MAT*

4. What does a condition survey cover?

Condition assessment

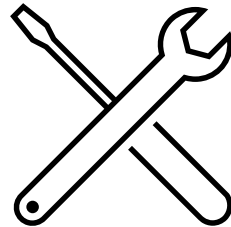
Condition surveys are based on the requirements of the DfE's Asset Management Plan 'Condition Assessment' but can provide much more information.

Typical elements in S2e surveys include:



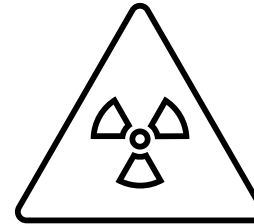
Building Fabric

- Roof
- Windows
- Doors
- Floor



Mechanical & Electrical

- Heating
- Ventilation
- Water
- Telecoms
- Data



Further Hazards

- Damp
- Sewage
- Drainage
- Asbestos
- Fire safety



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5. How is condition graded and prioritised?

Each element within your estate will be graded as to its **condition** (from A = Good to D = Bad) and as to **priority** for carrying out remedial action.

PRIORITY	D – BAD Life expectancy expired and/or serious risk of imminent failure	C – POOR Exhibiting major defects and/or not operating as intended	B – OK Performing as intended but exhibiting minor deterioration	A – GOOD Performing as intended and operating efficiently
URGENT Needed to prevent closure of premises, address High H&S risk to occupants or remedy serious breach of legislation.	D1	C1		
ESSENTIAL Within 2 years to prevent serious deterioration of fabric/service, address medium H&S risk to occupants or remedy less urgent breach of legislation.		C2	B2	
DESIRABLE Required with 3-5 years to prevent deterioration of fabric/service, address Low H&S risk to occupants and remedy minor breach of legislation.		C3	B3	A3
LONG TERM Required outside 5-year plan to prevent possible deterioration of the fabric/service. Ongoing planned cyclical works.			B4	A4

D1 – high priority to be progressed as unplanned works in current financial year
 C1 – high priority to be progressed in the following year's planned programme
 C2 – medium priority to be progressed in a future year's planned programme
 C3 and below – to be reviewed again in a future year.



“We chose the right partners in S2e, who delivered exceptional value for money on a complex project within very short time scales.”

Ben Elliott, Director of Corporate Services,
Higham Lane School

6. How often are condition surveys needed – and who should carry them out?

Condition surveys are usually carried out every 3-5 years by qualified chartered building surveyors

Depending on the size and nature of each academy, surveys may take between one and four weeks to conclude. The surveyors will need brief access to every room in every building but **experienced surveying teams** will be as unobtrusive as possible so as not to disrupt your normal activities.

You will receive a comprehensive report which is tailored to your academy or MAT estate.

It will include **budget costs** so you can plan remedial work, **photographs** of non-compliance so you can clearly see the problem and **risk assessments** so you can prioritise dangerous areas. Concerns and **recommendations** for further action are also included.

“We are on a premises journey together.”

Graham Hayes
Estates & Facilities Business Partner
The Diocese of Coventry MAT

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7. What funding is available for repairs and maintenance?

Grants available from the ESFA

Condition surveys provide the evidence required for single academies and small MATs to apply for funding and for larger MATs to prioritise how to spend their funding allocation.

Chartered building surveyors who specialise in the education sector – such as S2e – have the expertise to help source funding and project manage your building or maintenance work.

Grants are available via the government's Education and Skills Funding Agency (ESFA) in several ways:

1. Condition Improvement Funding (CIF)
2. School Condition Allocation (SCA)
3. Devolved Formula Capital Funding (DFC)
4. Urgent Capital Support (UFC)



“S2e secured funding from 3 separate routes, enabling us to successfully increase pupil capacity and maintain our outstanding teaching rating”

*Harinder Sidhu, Associate Vice Principal
Holyhead School, RSA Academies Trust*

8. Condition Improvement Funding (CIF)

What is it?

CIF is an annual bidding round for academies and smaller MATs. The key priority for the fund is centred around addressing significant condition needs but it can also be used to support a small proportion of expansion projects. A key prerequisite for applying for CIF is having an up to date Condition Survey.

Who is eligible?

Single academy trusts, small MATs (with less than 5 academies or 3,000 pupils) and sixth form colleges.

How much is there available?

In 2020, the ESFA made a total of £616 million available for 2,056 projects. In recent years, the amount available has decreased but applications have increased, meaning the fund is typically at least 4 times oversubscribed.

How do you apply?

The guidance for the 2021/22 round has yet to be published but it is likely to follow the trend of previous years, with registration in October, submission by the end of December and results announced in the following April 2020. There is a further opportunity to appeal following the results in April. For further information on CIF, please visit

www.gov.uk/guidance/condition-improvement-fund#overview



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9. School Condition Allocation (SCA)

What is it?

Each year, larger MATs, receive an SCA from the ESFA. The SCA is granted on the basis that it is used to keep academy buildings in good condition so that pupils have a safe and suitable environment in which to learn. The fund is for carrying out priority maintenance needs, keeping buildings safe and in good working order, tackling poor building condition and ensuring building compliance with the latest energy efficiency and health & safety legislation.

Who is eligible?

This fund applies to MATs with at least 5 academies and/or more than 3,000 pupils.

How much is there available?

In 2019-20 £237 million was made available.

How do you apply?

The SCA is automatically awarded by the ESFA to each eligible MAT. The amount of funding each MAT gets is based on specific methodology set out by the ESFA. Underpinning the level of funding are up to date condition surveys.

For further information on SCA, please visit www.gov.uk/guidance/capital-funding-for-multi-academy-trusts-mats.

“The school is now a fantastic place to be and has been absolutely transformed by the work S2e have carried out”

David Green
School Business Manager
Woodbrook Vale Academy Trust

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10. Other sources of condition funding

In addition, there are a number of other funding options worth considering, such as:

Urgent Capital Support (UCF)

This fund is for academies and sixth-form colleges that do not have access to SCA, and are in need of assistance to address urgent building conditions issues. To qualify, these issues would need to either pose a safety threat to staff and pupils, or potentially result in the closure (or significant part) of the school.

Devolved Formula Capital Funding (DFC)

Direct capital funding is calculated on a formulaic basis for academies and schools to maintain their buildings and grounds and fund small-scale capital projects, including ICT. Local Authorities receive DFC payments and are required to pass on these allocations to the schools. Academy trusts receive their DFC allocation from the Department of Education (DFE).

Section 106

Schools looking to secure additional capital (to support local community services and social infrastructure) when housing growth places additional pressure on them, could be eligible for Section 106 or CIL funding.



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11. In summary

We hope that you have found this ebook a useful overview of why condition surveys are needed, the benefits they bring and how they are essential if you want to **secure funding** for maintenance and get the very **best value** out of money you allocate for repairs.

We have outlined how condition surveys help you keep pupils and staff safe, as well as ensuring an **optimum learning environment** for your pupils.

Surveyors to Education can support your needs in surveying the condition of your estate, **prioritising** urgent rectification work and **budgeting** for ongoing maintenance. We are a specialist consultancy for MAT and academy surveying, funding and estates planning and **the UK's most successful independent CIF funding consultancy**, with over £250 million secured since 2013.

Whether you are a stand-alone academy, small MAT or larger MAT, our qualified team can offer guidance wherever you are on your estates journey. If you would like to discuss any of the information in this ebook or have any questions, please contact us and we will be delighted to help.

The Surveyors to Education Team

“Surveyors to Education completed condition surveys in order to prioritise our capital spend through a five-year plan.”

Catherine Clayton, CFO
The Wickersley Partnership Trust

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