

## Estates Strategy 2023- 2028

### 1.0 Introduction

This document sets out how Bordesley Multi Academy Trust (BMAT) will manage our estate strategically in order to achieve our Estate Vision, which ultimately supports BMATs Guiding Principle and Core Values. This Estate Strategy provides the framework and direction by which our Estate Vision will be delivered over a 3 to 5 year period whilst being reviewed annually. Operations and Compliance Committees will monitor and report to Trust on the progress that is made in delivering the Estate Strategy and understand the role of the estate in meeting educational objectives.

It is often said that our greatest resource is our people. On that basis, our second greatest resource is our estate. Financially the value of our estate assets dwarfs all other assets we hold, but we must always remember that we hold all our assets in trust to further our BMAT core values as a charitable organisation. Our estate must be used to further the BMAT Values, now and into the future as we are guardians of the estate in the same way as we are guardians of educational standards.

Strategic estate management is what we do to make sure that we manage our estate to achieve our BMAT guiding principles and Core Values. Strategic estate management helps the trust to:

- Make decisions supported by evidence
- Use our resources effectively
- Maximise the estate's value to the trust

To manage the trust estate strategically we must:

- Understand what we need to do with the estate to meet our education goals
- Have secure governance arrangements
- Assign clear responsibilities across the trust for managing the estate
- Make and implement plans; and
- Review and track performance

## Guiding Principles

The significant guiding principles of the MAT are based around autonomy, trust, respect, equity and outstanding relationships.

## BMAT Core Values

### Community

We believe that success is achieved by working in partnership with parents, carers and the wider community. We are committed to working with our partners to ensure the very best outcomes for all our learners, from 3 to 19.

### Relationships

We believe that positive and constructive relationships are at the heart of every successful school. This allows the entire community to be valued and challenged to be their best, raising aspirations for all.

### Education

We are passionate about learning about practice that will improve our pupils' lives and their outcomes for the future.

## 2.0 BMAT Estates Vision

BMAT strives to create safe, exciting and inspiring learning spaces for our pupils, both indoors and outdoors, further enhancing their educational experience. We continuously improve the resilience of our school estates both land and buildings, leading improvement projects and the day to day running of the estate to enable school leaders to focus on creating academic excellence in their settings. We consistently promote innovation in energy efficiency, links to the curriculum to aid learning and are committed to seek new ways in which to build sustainability, thereby reducing our carbon footprint and ultimately creating a better future for our pupils.

## 3. Estate Management

BMAT are guided by the DfEs Good Estate Management for Schools documentation (GEMS) which sets out the fundamentals of best practice [Good estate management for schools - Guidance - GOV.UK \(www.gov.uk\)](http://www.gov.uk).

BMAT have a wide ranging and experienced team of professionals who manage the school estate day to day. The Chief Operating Officer (COO), School Operation Officers (SOO) and School Site teams are appropriately skilled and trained to undertake a wide variety of tasks. External assistance is quality assured and purchased where skills and/or resources are not available within BMAT. Health and Safety is also audited annually by external consultants to ensure compliance in all areas.

The team ensures that there is full compliance with all health and safety regulations continuously being adhered to with regularly monitoring by the COO to ensure ongoing site compliance.

The SOOs coordinate all capital project improvements and the day to day management of the schools in line with our Compliance Monitoring and Premises Management Procedures. Benchmarking is used to measure and monitor the performance of our estate as we strive for continual improvement.

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

Major works to BMAT estates are scheduled during school holidays wherever possible and out of school hours in order to minimise the impact to our pupils and day to day operations.

## 4. Finance

Robust policies and procedures around financial authority, procurement processes and measuring value for money and sustainability ensure careful use of public funds in accordance with Financial Regulations, Anti-Fraud, Corruption & Bribery Policy, Competitive Tendering Policy, Reserves Policy and Whistleblowing Policy. Understanding the performance of our estate and using it to challenge and demonstrate value for money is an important part of accountability.

The major funding sources open to BMAT for building compliance, repairs, maintenance, and improvements are:

### Revenue

- General Annual Grant – schools building repairs and maintenance budgets
- General Annual Grant – health and safety compliance documentation

### Capital

- Devolved Formula Capital annual allocations (approx. £7,000 per school per year) Condition Improvement Grant bids, see table below
- Bids to external sources e.g. Lottery Fund ESFA
- specific grants e.g. BMS extension WCC
- Once BMAT reaches 3,000 pupils the ability to bid for CIF is removed and we will receive an annual allocation of capital funding called School Condition Allocations

BMAT are successful at securing additional funding for the benefit of our communities. The table below summaries the capital funding secured by BMAT since conversion to academy.

Financial year bid	School	Works undertaken	CIF Grant Secured £
2021	WFA	Heating Boiler	£ 213,161
2022	BMS	Roof	£ 148,962
2022	THS	Roof	£ 397,579
2022	THS	Windows	£ 496,372
<b>Total CIF Grants Secured</b>			<b>£ 1,256,074</b>

## 5. Environmental Improvements and Climate Change

Bordesley Multi Academy Trust are committed to reducing the carbon footprint across all of the estate by consideration and analysis of the environmental impact of our activities. By taking an inclusive approach we will ensure involvement of our staff, pupils and communities. Below is a summary of climate change initiatives in progress to improve the estate and reduce our carbon emissions. The Trust, together with Operation and Compliance committees for each school, are committed to maximising improvements whilst balancing the budget. The latest version is reported termly and an example shown at appendix A.

## 6. BMAT Estate

It is critical that our schools are exciting, safe and inspiring environments, not only because they are a physical representation of the Trust, but to provide outstanding learning spaces from which to grow. BMATs SOOs have a shared pride in enabling the best possible environment for all users.

Bordesley Multi Academy Trust currently consists of 4 schools across the Redditch.

All schools are leasehold and the local authorities retain ownership. A summary of the estate is detail in appendix B.

## 7. Proposed Changes in 2023/24

As a learning organisation we are constantly reviewing working practices and considering ways to streamline process. Headteachers and School Operation Officers in each school have a critical role in estates and Health & Safety management. Some responsibility for tasks must be kept site specific but there are elements which can be completed on behalf of all schools reducing administration and duplication of task. All schools utilise facilities management solutions to promote efficient working practices and help to develop changes for the Compliance Monitoring and Premises Management Procedures to ensure that no tasks are missed, processes are streamlined and value for money is maximised.

## Appendix A - Example of Current Climate Change Improvements

	<b>Birchensale</b>	<b>Holyoakes</b>	<b>Trinity</b>	<b>Woodfield</b>
Roof/insulation	2020	2022 - Newbuild	2001	1996
Windows	2020	2022 – Newbuild all double glazed	2018- Majority double glazed	double glazed
Boilers	CIF bid 2023	2022 - Newbuild	2018	CIF Bid -
Boiler use training	No	Yes	Yes	No
Replace Pipework	Partial 2015	2022 - Newbuild	2019	-
Lighting	Mixture of fluorescent and led	LED	Mixture of fluorescent and led	Mixture of fluorescent and led
Recycling – paper	Yes	Yes	Yes	Yes
Recycling – food	Yes	No	No	Yes
Electric charging	No	Quote	No	No
Other	Solar	Solar	Considering solar	Solar

## Appendix B - Summary of Current BMAT Estate

School	Map location	Age	Site area	Building size	Floors	Pupils
<b>Birchensale</b>	<a href="https://maps.app.goo.gl/dEo4PVcLLkbSoLEAA">https://maps.app.goo.gl/dEo4PVcLLkbSoLEAA</a>	Circa 1900	53,728m <sup>2</sup>	2,890m <sup>2</sup>	2	Year 5 to Year 8
<b>Holyokes</b>	<a href="https://maps.app.goo.gl/Rr3h7miuNdgAvFsB8">https://maps.app.goo.gl/Rr3h7miuNdgAvFsB8</a>	2022	22,595 m <sup>2</sup>	2,805m <sup>2</sup>	1	Nursery to Year 4
<b>Trinity</b>	<a href="https://maps.app.goo.gl/BR1TZV5o1EcthbJbA">https://maps.app.goo.gl/BR1TZV5o1EcthbJbA</a>	Circa 1930	68,840 m <sup>2</sup>	Grove -2,800m <sup>2</sup> Main building – 4,724m <sup>2</sup> Tech block – 1,387 m <sup>2</sup> Sixth Form – 700m <sup>2</sup>	3	Year 9 to year 13
<b>Woodfield</b>	<a href="https://maps.app.goo.gl/jEm8ndiS1HkVVPfc9">https://maps.app.goo.gl/jEm8ndiS1HkVVPfc9</a>	Circa 1900	46,347 m <sup>2</sup>	Main building - 3,308m <sup>2</sup> DT – 444m <sup>2</sup> PSU – 219m <sup>2</sup>	2	Year 5 – Year 8