



TRUST ESTATES STRATEGY

Blessed Edward Bamber Catholic Multi Academy Trust

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Hebrews 3:4

For every house is built by someone, but the builder of all things is God

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1. Introduction

Estate Strategy

Blessed Edward Bamber Catholic Multi Academy Trust (BEBCMAT) is committed to ensuring that our estate (land and buildings) is strategically managed to support our overarching educational needs and goals. The Estate Strategy outlines how the Estate Vision will be achieved.

The Estate Vision to support the Blessed Edward Bamber Multi Academy Trust (BEBCMAT) is:

We need fit for purpose, safe secure learning environments across our Trust. Our Trust's estate vision will guarantee we continue to invest in our buildings to ensure they remain, pleasant, safe, accessible spaces in our community where every pupil is cared for and looked after. Pupils and staff are at the heart of our estates vision. BEBCMAT will aspire to create outstanding teaching and learning spaces, both indoors and outside to provide safe and healthy spaces for our pupils and staff now and in the future.

In line with the Diocese of Lancaster protocol on Care for Creation and the principles of Catholic Social Teaching, we are called to live our faith through our actions. As a Trust, we are committed to taking actions that ensure a world where human dignity and the environment flourish.

As a growing Trust we will build sustainability into the development and planning of our estates, ensuring our schools continue to meet the needs of educating the children and young people in our communities. At BEBCMAT, we are committed to fostering a sustainable future and deep sense of responsibility for our community. Inspired by Pope Francis writings in Laudato Si, our estates vision and strategy aspire to minimise our ecological and carbon footprint while maximising the positive impact of our land and buildings. Through strong collaboration with the Diocese of Lancaster, we strive to inspire positive change within our Trust and beyond.

2. The Estate

The Trust estate is growing to achieve the Bishop's vision of 22 schools by 2026.

3. Aims

- BEBCMAT strives to deliver high-quality places to learn and teach in, inside and out;
- We want to ensure each premises within our Trust can deliver our Estates Vision to the highest standard;
- Understanding what changes are needed across the estate and when, while reflecting on assessment of any works required and how these need to be prioritised;
- Bringing a long-term view on capital investment and expenditure across the Trust, reflecting

an assessment of condition and what is needed to make schools safe;

- Improve sustainability and minimise our environmental impact and carbon footprint.

4. Objectives

- To provide a rounded overview of what input our premises need to provide safe and secure environments which support the Education Vision.
- To ensure premise data, information and knowledge informs how we provide capital investment and prioritisation across the Trust.
- To explore energy efficient, sustainability and green credentials across the Trust.

5. Suitability

We acknowledge that having a high-quality estate results in pupils learning in a positive environment, wishing to attend our schools and our staff having a comfortable and functional place in which to work. We will also consider suitability when planning remodelling or expansion of our estate, choosing to make crucial adjustments to improve the positive impact of the estate where this is practical and affordable.

6. Condition

Funding that the Trust receives to tackle condition issues (currently Condition Improvement Fund) will be spent by prioritising those condition issues that have the greatest risk to prevent us using our estate for the delivery of education. This will be achieved by targeting those with the worst condition (D or C) and the greatest potential impact.

Where condition issues exist that are not being tackled using the Trust grant funding, the devolved formula capital (DFC) allocation to each school should be used where practical to resolve the most serious issues, supplemented by school reserves where possible.

In some cases, condition issues may be so severe and funding so limited that the agreed course of action is either not to use the affected area/building or to strategically manage the condition until an opportunity arises to replace.

7. Standard of Work

When carrying out any expansion or refurbishment work our aim is to ensure the work is fit for purpose and has a long lifespan, meeting all building and other regulations. Our current strategy is to appoint building consultants to manage medium to large projects to ensure that quality work is achieved.

8. Value for Money

When procuring works to our estate we always use best value practices in line with the Trust's financial regulations to achieve value for money. We will endeavor to carry out work efficiently (eg: to do more than one thing when scaffolding is in place) or tackle a long-held aspiration when a grant becomes available. This will become achievable once the Trust attracts School Condition Allocation (SCA). We will also consider not doing works where they have a limited lifespan or do not fit into the longer-term plans for our estate.

9. Insurance

The Trust will hold appropriate insurance to protect us against the risk of serious damage to our buildings for our current estate and any significant building projects.

10. Impact of Works on Our Estate

We carefully consider the impact of the process of carrying out works on our estate, particularly the impact on the education provision while the works are going on. We always prioritise health and safety, ensuring our pupils and staff are not put at risk by the building works. Work is planned logically to minimise disruption to day-to-day operations.

11. Sustainability

We will address our climate change responsibilities and look to achieve carbon reduction by consideration and analysis of the environment impact of our activities, and this will be an inclusive approach that will involve our staff, students and Diocese. The key element of our approach to sustainability and carbon reduction will be the ability to undertake projects that will see the Estate Strategy realised.

12. Collaborative Working

We will work closely with the Diocese of Lancaster and our sister Trusts to keep our estates in a 'safe, warm and dry' condition for the benefit of all of our community.

13. Strategic Plan

The following strategic plan is set out in terms of our intent, implementation and impact to deliver in the four key areas of:

- School Investment
- Safe and Secure Buildings
- Schools fit for purpose

- Sustainability

Each school must have an asset management plan, responding to the above estate strategy, but tailored to the circumstances and priorities of the school. The asset management plan determines local priorities and actions.

14. Intent

School Investment: To ensure schools are fully maintained and developed, strategic investment needs to be a priority. Each school must have an asset management plan.

Safe and secure buildings: To ensure that our teaching environment is conducive to effective learning. Pupils and staff need to feel safe and secure in the environment provided, so that every pupil cared for in our schools is looked after and supported.

Schools fit for purpose: To develop our premises to ensure all spaces are accessible, stimulating, environmentally friendly and compliant spaces, fit for future generations.

Sustainability: To minimise our impact on the world around us, inspired by Pope Francis' Laudato Si vision.

15. Implementation

School Investment:

- Explore revenue funding reserves in support of capital investment;
- Devolved Formula Capital (DFC) is prioritised;
- Purchase and use of appropriate software to ensure statutory compliance across the Trust;
- Identify and apply for grant funding opportunities;
- Use condition data collection in support of prioritisation of asset management plan through the Trust SCA Building Committee.

Safe and secure buildings:

- Assess each school premise to ensure they are safe places to educate our pupils;
- Review of safety concerns within each school through both compliance monitoring and H&S audits;
- Support of School Business Managers and Site Mangers to monitor and maintain safe secure premises;
- Review the site security measures in place around evacuation and lockdown practices and procedures;
- Review site boundary security measures and ensure upgrades are implemented where required;
- Disclosure and Barring Service (DBS) checks of all contractors engaged on sites across the

Trust, Trust visitor policy to be followed by all.

Schools fit for purpose:

- Ensure data available across the Trust on condition, fire compartmentalisation, floor plans, key locations identified of service points etc;
- Review all schools' Planned Admission Number (PAN)/Net capacity and suitability assessments are relevant and accurate;
- Ensure cyclical redecoration programmes in place and budgeted through revenue funds, both internal and external;
- Review accessible provisions across the Trust (toilets, level access, lift provision, hearing induction loops etc.);
- Any new building or re-configuration to support the needs of the curriculum is supported on the basis that the curriculum itself is deliverable and financially sustainable over the long term;
- Applications made for future capital grants to support Trust initiatives.

Sustainability:

- Identify and apply for decarbonisation funding opportunities;
- Develop the role of Sustainability champion at school level;
- Challenge and support schools to recycle efficiently;
- Fleet control;
- Energy efficiency.

16. Impact

School Investment:

- 3 – 5-year asset management plan in place;
- Full understanding of funding limitations and shortfalls in prioritising delivery of capital investment across the Trust;
- Full in-year allocation and expenditure of DFC capital funding;
- Fully approved and audited capital expenditure;
- Statutorily compliant buildings across the Trust;
- Health & Safety compliant buildings across the Trust;
- Condition data collection in place to support prioritisation of capital allocation.

Safe and secure buildings:

- Ongoing evaluation of risks, Health & Safety and statutory compliance;
- Trust wide evaluation of evacuation and lockdown practices and prioritisation of any building requirements identified;
- Boundary works identified and capital funding in place to support upgrades over a phased

period;

- School teams feel supported and empowered to ensure their site is safe for teachers and learners;
- Positive evaluation and monitoring through the Audit and Risk Committee (A&R).

Schools fit for purpose:

- Data available across the Trust on condition, fire compartmentalisation, floor plans, key locations identified of service and call points etc;
- Evaluation of all sites available on a school-by-school basis;
- Proper planning in place for cyclical maintenance within revenue budgets.

Sustainability:

- Ensuring any future investments in the schools estates recognise environmental impacts, and identifies opportunities to improve carbon reduction projects;
- Continuing to promote an estate wide ecologically friendly ethos and promoting purchase of fair-trade products;
- Reduce our carbon footprint with effective processes, e.g. for waste management;
- Fleet control across the schools and promoting the use of technology to reduce travel where possible;
- Effective energy management, sustainable and renewable heat/energy.