



Discovery Schools Estates Strategy

2021-24

Date of Strategic Review: Summer 2024

1. Introduction & Purpose

The 'Discovery Estate' is arguable one of the most important aspect of the Trust's responsibilities to enable high quality education to be delivered to children. Without a school building, children cannot not attend and receive excellent teaching and learning. Therefore, there is a strategic importance to ensure the school estate is maintained, managed, and developed to its fullest potential for the use of children and their families now and in the long-term future.

This strategy aims to set out the strategic vision, direction and intentions relating to the Discovery estate and how it is used to support the overall achievement of educational goals and needs of the Trust. This document underpins the working of the Operations & Estates teams, guiding day-to-day decision making and management.

This document outlines;

- The vision for Discovery Schools ensuring the estate is managed as a strategic resource, linked to the Trust's Teaching & Learning Strategy 'No Limits!'
- The methodology and procedure taken when considering the improvement of the estate and its facilities to ensure a coordinated and a consistent approach.
- The approach taken to develop long term planning (3 to 5 years or longer) Capital Programme & Plan with clear links to the Trust's Strategic Growth Strategy.
- The management of Planned Preventative Maintenance (PPM) and H&S procedures in schools and how these are managed thorough the Estate Development Plan (EDP) process and audits.
- Risk identification, management and escalation for estate and facilities issues across the estate.

3. Vision for the Discovery Estate

Below is as a set of vision statements which provide clear direction and to help inform decision-making.

'The work of the operations and estate functions is to ensure that the physical estate is safe, maintained and developed to provide the best possible learning environment in our schools, providing all our children the opportunity to fulfil their full potential.'

'The Trust aspires to provide the best possible learning environment, bringing up to standard those schools whose suitability and condition can be improved.'

'Need for capital improvements are considered in conjunction with condition surveys, risk assessment and professional opinion of risk and probability, identifying a balanced priority order of needs across the Trust to inform the development of a dynamic capital programme.'

'To strategically plan the development of the estate to meet current and future education needs of DSAT, the individual character of schools and the communities they serves'

'All procurement of services and improvements are procured using best value principles and explore opportunities to gain economy of scales.'

'An enabled workforce who can appropriately plan & manage school level planned and reactive maintenance in line with our H&S obligations.'

'Aim to provide a school place for children who would like to attend a DSAT school where practically possible.'

'Maximising the use and capacity of the estate to its full potential to provide extended services.'

4. Strategic Actions for Estates

To work towards achieving these vision statements, it is necessary to identify strategic actions to for this life of this strategy.

1. To continue to develop, shape and deliver a comprehensive capital programme based on priority for the Trust.
2. To work closely with colleagues in Keyham Lodge & Millgate Specials Schools as part of the integration into the Trust, understanding existing systems and procedures, looking for opportunities to amalgamate and develop.
3. Using the Estate Development Plan (EDP) system, effectively plan and coordinate property related maintenance and servicing requirements of the school estate.
4. To further strengthen the Trust compliance of H&S related responsibilities, by carrying out regular audits and monitoring of school buildings, processes, and systems.
5. To rollout and coordinate comprehensive H&S training to school staff.
6. To review how planned and reactive maintenance is procured and conducted in our schools.
7. To ensure DSAT facilities & estates management procedures and systems are strong and adaptable for new and existing schools joining the Trust, including the potential implementation of a facilities Management Information System.
8. To maximise the Discovery estate to its full potential to increase DSAT's education offer to families in line with DSAT's Growth plan, such as pre schools and SEND Resource

Hubs.

9. Supporting the development of Discovery's Green Sustainability Strategy, including capital upgrades to schools' sites e.g LED lighting & Solar Panels.

5. Estate Development Plan (EDP)

The EDP is a valuable tool to help inform DSAT's ability to balance its aspiration in wanting to achieve the estate vision statements and the need to meet statutory/educational objectives. It is necessary for the Trust to have a consistent way to plan and manage their school estates and necessary maintenance. The Estate Development Plan (EDP) helps schools to identify, plan and coordinate works which meet the vision/requirements for the Trust. The EDP, in conjunction with other key Facilities documents contained with Teams work as Discovery's version of the traditional school's 'Asset Management Plan'. This includes;

- Condition, maintenance, suitability, sufficiency surveys
- School H&S audit surveys, Building service reports and assessments
- Fire Risk Assessments (FRA)
- Local Asbestos Management Plan (LAMP)

Each school's EDP data and information will be used to inform a master '**Strategic Capital Priority Works List**'. The list will be a live document which will change as areas of priority are address/new areas are identified. Priorities for capital investments will be determined using the risk assessment indicator and Central Team/school judgement of the probability of risk. Priority of works for each school/cluster will be shared with each Cluster Board and the Finance, Audit Committee and or Board accordingly.

It will also detail information from the DSAT's Growth Plan which may require capital investment from either capital funds or Trust reserves. This will provide the Trust with a strategic overview of the long-term view priorities to inform the spending of future capital budgets/investments in priority order, support the commissioning of projects across several schools to gain economy of scale and to ensure priorities are addressed in consistent and transparent manner.

6. Planned and Reactive Maintenance

Maintenance is split in to two components; one, planned maintenance and servicing to ensure legal compliance and two, reactive maintenance when something fails and goes wrong. Currently DSAT use YMD Boon via a Service Level Agreement contract to provide monitoring and planning of maintenance and servicing in schools, whilst the estate function manages any emergency or reactive maintenance using an established network of contractors and suppliers of services.

7. H&S Management for School Estates including training

A key aspect of ensuring schools buildings remain safe and operational is the H&S structure, systems and procedures in place. The development and strengthening of H&S for schools is a core function of the Operations & Estate teams, working in partnership with schools, Leicestershire Traded Services and YMD Boons.

The Estates function provides a strategic report to the FAR committee on assurance and progress of H&S annually, and regular reporting on specific issues via the risk management process.

8. Estate Risk Management

Risk identification and management is a key part to ensure the *'physical estate is safe, maintained and developed to provide the best possible learning environment'*.

Estate & H&S risks concerning the estate are recorded via the 'School Estates Risk Register' which is held as a tab on the Estate Development Plan. Monitoring and escalations of estates risk is conducted by the Operations & Estate teams to ensure necessary risk are promoted to the trust risk register where necessary

9. Funding Streams

School Conditions Allocation (SCA): As of 1 September 2016, DSAT exceeded the thresholds for the CIF. The Trust now receive an annual School Conditions Allocation. This funding is based on pupil numbers. The SCA can be rolled over up to a maximum of one year (i.e. 100% of funding can be retained into year two but would be recouped if not spent at the end of year two). It was previously agreed by the Finance, Risk & Committee to;

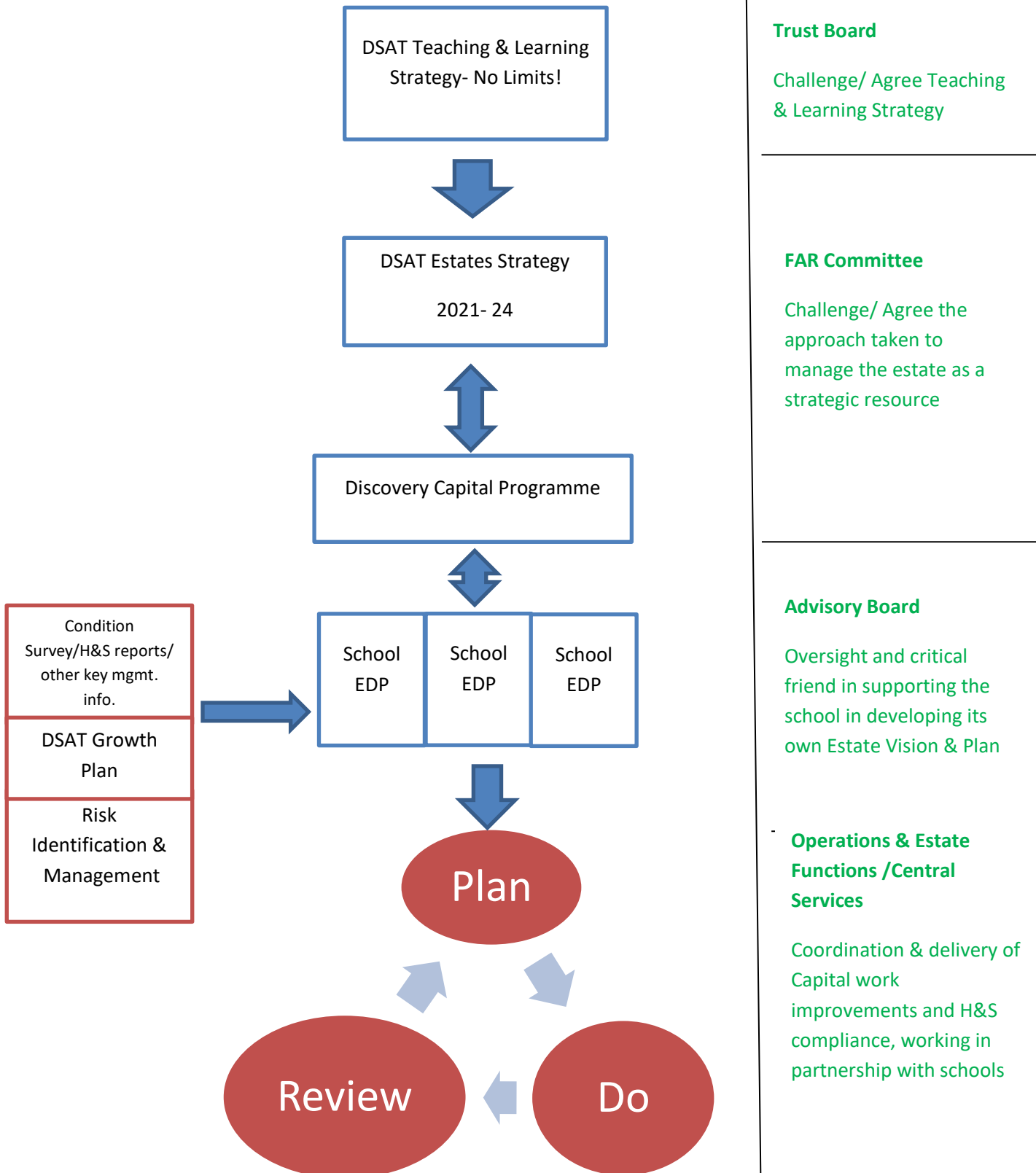
- hold 10% of the total budget as contingency for emergency/reactive works
- hold 10% of the total budget to hold to cover costs for the delivery of the SCA funding

The SCA funding is the cornerstone of the Capital Programme for The Trust which is reported to the Finance, Audit and Risk Committee who provide governance and corporate oversight as per the Trust's Scheme of Delegation.

Devolved Formula Capital (DFC): In addition to the SCA received at a Trust level, each individual school will also receive DFC for estates projects/maintenance/ICT which is managed by the school, with the support of the Central Services Team. The purpose of this funding is to maintain and improve the basic condition of the school buildings, so that all children can learn in a safe and effective environment. The estate team works in partnership with schools using the EDP process to help direct DFC to the biggest area of need.

10. Strategic Estates Overview & Decision Making

This diagram sets out the DSAT estates overview and decision making in line with the Trust's Scheme of Delegation.



11. Dealing with Emergencies

Effective planning and preventative maintenance regimes will minimise the risk of emergency situations affecting school premises. An appropriate approach to undertaking surveys or inspections and regular maintenance should identify issues that need to be addressed, such as structural defects or significantly deteriorating condition before they cause an emergency. Very occasionally, unforeseen circumstances arise that result in severe damage or disruption to school premises. Examples include extreme weather conditions; vandalism, and accidents that are outside of the control of the school. Where such circumstances jeopardise, or prevent the continuation of education, or present a risk to the safety or security of staff and pupils. The Trust will take the following steps in line with the Trust's Business Continuity Plans:

- Take immediate action to ensure the safety and security of pupils and staff.
- Where necessary, make alternative arrangements for education to continue as soon as possible following the incident, and invoke emergency and business recovery plans.
- Seek professional advice as necessary on immediate and longer-term action required to repair the affected area.
- Consider the legislative and procedural requirements if specific hazards are involved e.g. asbestos, Legionella.
- Where the cost of repairs and recovery are significant, the Trust will consider the use of existing capital funds, any reserves, and reimbursement through the ESFA Risk Protection scheme. In exceptional circumstances DSAT could apply to ESFA for emergency funding.

Further Information

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