

Asset Management Plan, incorporating the Premises Management Policy and School Condition Allocation Policy

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1	April 2021	Incorporates v2 of the Premises Management Policy
2	March 2023	Cyclical review. Reflects new senior leadership structure and incorporates arrangements for the use of the Trust's School Condition Allocation funds
3	March 2024	Cyclical review. Reflects inclusion of Cumbria Academy for Autism
4	March 2025	Cyclical review. Reflects the inclusion of George Hastwell School
5	March 2026	Cyclical review. Reflects the estate changes relating to the new free schools, the 2026 White Paper; Every Child Achieving and Thriving, Alexandra School expansion, and updates to the SCA Allocation Policy

This policy will be subject to ongoing review and may be amended prior to the scheduled date of the next review in order to reflect changes in legislation, statutory guidance, or best practice (where appropriate).

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1. Estate vision

The Eden Academy Trust (the Trust) estate will provide the best possible learning environment for children and young people. The estate will meet the needs of learners and staff, providing a safe, secure and stimulating environment in which to learn and work. The estate will be maintained and continually monitored, reviewed and improved to meet changing demands.

2. Estate strategy

The Trust estate vision will be implemented by ensuring the alignment of the estate with the Trust's education development plan. The future development of the Trust is discussed and agreed by the Board of Trustees (the Board) annually. The estate strategy is also informed by periodic reviews of condition, suitability and sufficiency.

The programme of capital investment is informed by the outcome of periodic reviews.

2.1. Condition

The Trust's ambition is to undertake condition surveys for each school via industry professionals every 5 to 7 years dependent on available revenue funding. The independent condition surveys identify high priority condition items for investment.

In late 2021 the ESFA changed the eligibility criteria for special schools to access the School Condition Allocation (SCA) funding. On that basis Eden Academy became eligible for receipt of SCA.

Details of the way in which the Trust allocates its SCA funding is set out in Appendix 2.

Smaller capital improvement projects are undertaken from revenue funding when it is available.

Revenue funding is set aside annually for maintenance of all schools. Details of school estate maintenance is contained in the Premises Management Policy document which is attached at Appendix 1.

2.2. Suitability

The suitability of school premises changes with the changing needs of the children and young people we accept in our schools. For example, Alexandra school is likely to accept fewer learners with MLD in the future which may necessitate changes to facilities and equipment to accommodate learners with different needs. In addition the 2026 White Paper, Every Child Achieving and Thriving, is likely to mean that Special Schools will accept only those pupils with the highest need, Where possible pupils will be educated in mainstream settings. Suitability changes are generally incremental and usually paid for from revenue in the absence of DfE capital grant funding.

2.3. Sufficiency

It is the policy of the Trust to increase the supply of school places only at the request of the relevant local authority.

The Trust has developed a new special Free School in the South of the London Borough of Hillingdon with the support of the Council. The school is for primary phase children with SLD and the intention is that the children will move on to Moorcroft school, which provides for children in the secondary phase with SLD.

The Trust has also built an all through school for 180 children and young people on the old Grangewood site which was no longer fit for purpose.

In September 2021, the provision at the former RNIB Sunshine House School transferred into the Trust. In January 2026 Sunshine House was transferred back to the RNIB and children transferred to the new all through school with enhanced facilities to better meet their needs. Other developments to increase SEND places are also taking place or being discussed in conjunction with various local authorities. These are summarised in section 3.1 below.

3. Asset Management Plan (AMP)

3.1. Short to medium-term asset strategy

The Asset Management Strategy is informed by the Trust's education vision and the commitment to work with local authorities to ensure a sufficiency of appropriate special needs places in each area.

3.1.1. Grand Union Village School

The London Borough of Hillingdon requires additional special needs places in the south of the Borough and supported the Trust's bid to the DfE for capital to build a new special Free School in the area. The bid was successful, and the new primary phase special Free School is now occupied.

The design and construction of the new school has been the immediate priority for the Trust. Eden staff worked with DfE appointed designers to ensure that the built environment will meet the needs of the children and young people who are educated there.

3.1.2. Pinn River School

The Grangewood School Building is not fit for purpose and no longer provides an acceptable learning environment. The Trust decided to pursue the demolition and rebuild of the school on the same site in order to provide students with the optimum learning environment. At the same time, LB Hillingdon asked the Trust to increase the number of students the school could accommodate. In consultation with the Council, the Board agreed to pursue the creation of an enlarged all through school on the Grangewood site.

A bid to the DfE has been submitted for the design and construction of the new school. The construction of the all-through school on the Grangewood site was completed in December 2025 and the building occupied in January 2026

3.1.3. Hillingdon satellite site

In late 2021 LB Hillingdon approached the Trust with a view to opening a satellite site to create some additional places before Grand Union Village and Pinn River Schools open. Following detailed discussions with the local authority and The

Elliot Foundation Academy Trust (TEFAT) it was agreed to utilise some currently unused space at Pinkwell School in the south of the borough to provide 36 places. These are spread across the primary and secondary phases. The capital works were completed in September 2022 and ongoing revenue funding is being provided by LB Hillingdon. The satellite operation is led and staffed jointly by Grangewood and Moorcroft Schools and the pupils are on their respective rolls.

A further proposal was put forward to create additional places at the Pinkwell site and this was completed in September 2024 with 44 places now available. The capital works were funded by Hillingdon together with ongoing revenue costs.

It is anticipated that the Primary Phase will close in August 2026 and the Secondary phase will continue.

3.1.4. Free schools project resourcing

The work required to consult with students, families and staff throughout the life of the free schools project and establishing the Hillingdon and Cumbrian satellites has been considerable. Staff time has also been required to prepare bids and work with the DfE and other colleagues to achieve a successful outcome. This work is ongoing and there has been a significant revenue cost. The Board approved the required revenue expenditure in order to secure the best possible learning environment for current and future students in line with our vision whilst initiating discussions with the DfE regarding additional PDG funding resulting from delays in the free schools project which were outside of the Trust's control, or a direct result of DfE decisions and processes.

3.1.5. Alexandra School Expansion

Funding has been agreed with Harrow for the expansion of the Alexandra School site. This will increase place numbers from 80 to 110. Phase 1 of the project was completed for September 2025 and places increased to 100. Phase 2 will be completed in Easter 2026 with places increasing to 110 for September 2026

3.2. Governance

The Asset Management Plan is approved by the Board and reviewed annually. The Asset Management Plan includes the Premises Management Policy which details the processes for the management of school buildings and grounds and the Trust's approach to its use of SCA funding.

A Trustee with experience in education asset management meets regularly with Eden staff to discuss current issues and plan future maintenance and capital investment. The trustee with the asset management portfolio reports directly to the Board on related matters.

The Trust uses the services of industry professionals, when necessary.

3.3. Budget and finance

Each school is allocated an annual maintenance budget and expenditure is prioritised:

- Safety and security of the buildings and grounds

- Highest priority condition items
- Suitability improvements

3.4. Performance management of the estate

The efficiency of the estate is reviewed by monitoring expenditure to identify items which are expensive to maintain. It may be more cost effective to replace an item rather than repair it.

Fuel bills are monitored to provide an indication of thermal efficiency for example.

All available data is reviewed annually by the Chief Operating Officer (COO). The information is used to inform the following year's expenditure.

3.5. Data and data management

Data on utilities consumption, frequency of breakdowns and expenditure on the maintenance and running of the estate is recorded as part of the regular budgetary monitoring process. This is discussed at the fortnightly finance meetings between the Head¹ and the COO.

These are also discussed at the regular premises management meetings attended by the Head, the site manager and the Health and Safety Officer.

3.6. Procurement

Maintenance and construction work undertaken by the Trust is put out to competitive tender in accordance with the Financial Agreement and current legislation. The Trust's Procurement Policy provides further details.

3.7. Emergency planning

The Trust's Business Continuity Plan contains all the arrangements in place in the event of an emergency.

3.8. Meet health and safety and statutory compliance requirements

Details of the Trust's health and safety and statutory compliance regime are contained in the Premises Management Policy. The Trust has appointed an internal resource to monitor performance in this important area.

3.8.1. Health and safety

Responsibility for the health and safety of learners, staff and visitors sit with the Headteacher or Executive Head of school at an operational level.

The policies which inform the Trust's health and safety regime are established and reviewed at Board level.

3.8.2. Statutory compliance

Statutory compliance procedures are set out in the Premises Management Policy which is attached at Appendix 1.

¹ For the purposes of this document, Head refers to Executive Head, Headteacher or Head of School/Setting/Satellite as appropriate unless otherwise specified

Performance is monitored by the COO and reports by exception are made to the member of the Board with responsibility for monitoring asset management.

3.9. Maintenance of the estate

Maintenance of individual schools in the operational responsibility of the Head in consultation with the COO.

The maintenance plan for each school aims to ensure a safe and secure environment which is compliant and cost effective.

3.10. Land and buildings

As mentioned above, the Trust has condition reports provided by industry professionals which inform investment.

These reports will be discussed with Heads and with the Asset Management Committee to ensure capital investment is applied to the highest priority areas.

3.10.1. Tenure and land ownership

The tenure and ownership details for each school are set out below including any covenants or other legal constraints.

School	Tenure/ownership	Legal constraints
Alexandra	Leasehold	
Branthwaite Academy	Leasehold	
Grand Union Village School	Leasehold	School opened in January 2006 but was occupied by Grangewood from September 2023
Hexham Priory	Leasehold	
James Rennie	Leasehold	
Moorcroft	Leasehold	
Pentland Field	Freehold	Secretary of state has an interest and first charge on any proceeds of sale of the building
Pinn River School	Leasehold	School opened in January 2026
Hillingdon satellite (Pinkwell)	Leasehold	
James Rennie satellite (St. Edmunds)	Leasehold	

3.10.2. Acquisitions and disposals

Any acquisitions and disposals must be agreed by the Board. Reports to the Board on acquisitions and disposals include information on condition, legal constraints and future revenue implications.

3.11. Energy and water usage

Energy usage is tendered across the academy as a whole in order to obtain the best price for three-year contracts through negotiation. Wider national contracts are pursued where those are financially beneficial.

Water usage is monitored, and costs are kept to a minimum.

In the current climate of rising energy prices budgets are being adjusted accordingly and any new contracts are entered into for one year rather than three years.

3.12. Planning and implementing estate projects

3.12.1. Planning and prioritisation

The Board approves new condition and development projects. An important part of the approval process is consideration of the revenue implications arising from each decision.

In the case of a significant new development, such as the design and construction of new schools, the Board makes revenue provision for:

- Staff to work on bids
- Manage consultation with the DfE and,
- The involvement of students and families in the design of new or improved facilities.

A condition survey report was commissioned in spring 2022 from an external specialist contractor. The condition plan provides details for each school encompassing all aspects of school premises including, roofs, boilers, external doors and windows and all internal rooms and corridors. The Trust also records condition priorities which are external, mainly around the security of school sites. The plan provides a priority for each item of work and an estimated cost. The condition survey is used to prioritise the maintenance work required at each school. In addition, the condition survey also informs capital expenditure from the School Condition Allocation funding received by the Academy.

New condition Surveys will be commissioned in 2026 using an external contractor. The condition plan will be used to prioritise Capital works for the next 3 years

3.12.2. Project delivery

The Trust employs qualified industry professionals to project manage capital and revenue improvement projects as appropriate. The contracts are tendered in accordance with DfE requirements and are supervised by the Trust's appointed consultants.

Risk assessments are carried out by the school where the work is to be carried out. The work is programmed to ensure that disruptive work is undertaken during school holidays and that there is secure physical separation between students and construction or maintenance work.

Appendix 1: Premises Management Policy

Version Control

<u>Ver.</u>	<u>Date</u>	<u>Comment</u>
1	September 2017	
2	April 2021	Cyclical update based on previous version and current model policy from The Key.
3	March 2023	Cyclical review
4	March 2024	Cyclical review
5	March 2025	Cyclical review
6	March 2026	Cyclical review

1. Context

The Eden Academy Trust (the Trust) recognises its duties for achieving and maintaining standards which meet current legislative requirements, regulations and guidance. This policy sets out the relevant framework, arrangements and procedures.

2. Introduction

The Trust has a responsibility to develop and maintain a Premises Management Policy (PMP). This is an integral part of the schools' improvement plans which ensures all decisions are informed by the requirements of the PMP as well as educational and financial considerations.

This policy reflects the DfE's guidance on good estate management for schools and complies with our funding agreement and articles of association.

3. Aims and objectives

The aims of the Trust's PMP are to ensure that the Trust:

- Manages its buildings and equipment in an efficient, legally compliant way by continuing to maintain and improve all aspects of the physical environment of the site and undertaking regular inspections and tests of the buildings and equipment, taking into account statutory requirements and best practice recommendations;
- Promote the safety and wellbeing of our staff, pupils, parents and visitors through effective maintenance of buildings and equipment in accordance with the Health and Safety at Work etc. Act 1974;
- Help raise standards of educational/therapy/care achievement by maintaining and developing its schools to meet the needs of pupils;

- Reflect the future needs of pupils in conjunction with the Asset Management Plan;
- Align investment in the schools with corporate and strategic partnerships;
- Provide 'Best Value' and maximise value for money;
- Comply with the requirements of The Education (Independent School Standards) Regulations 2014; and
- For those of our schools with an Early Years Foundation Stage (EYFS) setting - comply with the requirements of the statutory framework for the EYFS.

The main objectives of the PMP are to:

- Provide an agreed basis for decisions on spending;
- Help Trustees and staff in developing plans for the school;
- Maximise opportunities to secure funding for school premises;
- Help in the development of capital projects; and
- Provide assurance to all those involved in the process and who have an interest, that capital projects are soundly based and represent good value for money.

The aims and objectives above are reflected in the Asset Management Plan (AMP), and both the AMP and PMP have been developed as complementary documents.

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The PMP endeavours to be a partnership between staff, those charged with governance, parents, pupils and external agencies, where appropriate.

The Trust has identified the priorities from the school and services' improvement plans and other sources as identified in the AMP and put together a prioritisation schedule which covers statutory obligations and educational/therapy/care priorities and aspirations.

The policy reflects Department for Education's guidance on good estate management for schools.

4. Functions

The Trust's PMP has three main functions. These are:

- A. Provision of a sufficient number of school places (sufficiency);
- B. Provision of an appropriate learning/therapy/care environment (suitability); and
- C. The repair, improvement and replacement of school buildings (condition).

4.1. Sufficiency & net capacity assessments

The Trust works with the relevant LAs on the supply of school places, either through the provision of new school places to meet growth or through surplus

place removal. We understand the physical capacity of our school sites and work with the LAs to provide additional places where possible.

4.2. Suitability

As mentioned above, the Trust works with LAs to provide a sufficient number of places. Trustees and staff also ensure that the sites and buildings are fit for their purpose, to provide an appropriate learning/therapy/care environment and meet legislative requirements. Suitability includes flexibility to meet changes in curriculum needs. Issues are addressed through investment in renewals and replacement.

4.3. Condition

The Trust's buildings are properly maintained through regular maintenance, providing a warm, dry and safe environment for the students and staff. Annual condition inspections identify the work required to maintain school buildings at a serviceable state of repair and rectify any breaches in legislation. The inspections are used to identify an annual programme of repairs and maintenance.

To support the main functions of the PMP, data for each building is collected and updated at least every two years.

5. Premises overview

The Trust has commissioned a firm of consultants to carry out a full review and produce a condition survey report of each school in the Academy Trust, which we aim to renew every 5 years.

The surveys provide a prioritised list of works for each school and enable an overarching plan prioritised for the Trust as a whole.

The condition survey reports are reviewed by the Chief Operating Officer (COO), Heads ² and Site Managers to produce a working document used to inform operational decision making in respect of works required.

The condition surveys also inform the annual allocation of the School Condition Allocation funding received from the DfE

6. Managing the plan

In developing the PMP, several issues were considered, including:

- Maintaining statutory school asset data;
- Commissioning premises surveys, including condition, asbestos and Accessibility;
- Agreeing and managing a capital repairs and maintenance programme for the school;

² For the purposes of this document, Head refers to Headteacher or Head of School as appropriate

- Providing a point of contact for the Board on property management matters; and
- Buying project management and consultancy services as required.

The Board (through the appropriate portfolio holder), COO, Heads and Site Managers will ensure this PMP is properly implemented, and that tests and inspections are carried out in accordance with this policy.

The Heads and Site Managers are responsible for ensuring relevant risk assessments are conducted and for reporting to the Board, as required.

The Site Managers are responsible for:

- Inspecting and maintaining the school premises within financial constraints;
- Conducting repairs and maintenance;
- Being the first point of contact for any issues with the premises;
- Conducting and keeping a record of risk assessments and incident logs related to the school premises;
- Liaising with the Head about what actions need to be taken to keep the school premises safe, and
- Advise and supervise contractors on site, including the provision of asbestos information.

Copies of risk assessments and paperwork relating to any checks are kept on site at each school.

This policy will be reviewed by COO every three years. At each review, the policy will be shared with and approved by the Board.

7. Inspection and testing

The Trust's schools maintain accurate records and details of all statutory tests which are undertaken at our premises. These include relevant paperwork and certificates.

All requirements and recommendations highlighted in inspection reports and certificates are reviewed and acted on as necessary.

As part of the records of completed works, we include the dates when the works were undertaken and the details of the individual or company who completed them, along with their qualifications/certifications and/or experience.

The table in Annex A sets out the issues we inspect and the inspection frequency. In most cases the person responsible for checking each issue would be the Site Manager. Where appropriate, a suitably qualified person to carry out inspection, testing or maintenance is engaged.

It covers statutory checks as well as recommended good practice checks from relevant guidance. It is based on the checks and testing sections of the DfE estates guidance.

The Trust buys in health and safety consultancy to monitor inspection and testing.

8. Risk assessments and other checks

In addition to the risk assessments, we are required to have in place we ensure we have additional risk assessments in place, regularly updated, to cover:

- Car parking and vehicle/pedestrian segregation
- Traffic management
- Shared premises
- Vacant buildings
- Lettings

We also make sure further checks are made to confirm the following:

- Correct and up-to-date information is displayed in all notices
- Compliance with the Construction (Design and Management) Regulations 2015 during construction projects
- Contractors have the necessary qualifications to carry out the specified work
- Compliance with the Equality Act 2010 when making changes or alterations to a building or the external environment

9. Links with other policies

This premises management policy is linked to:

- Health and safety policy;
- Risk assessment policy;
- Finance policy and manual.

Annex A: Inspection and testing programme

Issue to inspect	Frequency	Comments
Portable appliance testing (PAT)	Variable, according to risk and how the equipment is constructed. Regular visual inspections where PAT is not required.	We will refer to HSE guidance on maintaining portable electric equipment for suggested intervals and types of testing/inspection.
Fixed electrical installation tests (including lightning conductors)	Variable, according to the number and severity of faults found at last inspection.	Inspection and testing always carried out by a competent person.
Emergency lighting	Monthly flash test. 6-monthly condition test (including 3-hour battery test) by a competent person.	
Lifts	At least every 6 months for passenger lifts and lift accessories, every 12 months for other lifts (e.g., goods lifts) – always by a competent person.	
Gas appliances and fittings	Routinely, in accordance with manufacturer recommendations (or other professional advice if unavailable). Annual safety checks (in line with good practice / required if the premises are used for residential accommodation).	All work carried out by a Gas Safe Registered engineer.
Fuel oil storage	Checks at least weekly, with more detailed annual inspections by qualified inspectors.	

Issue to inspect	Frequency	Comments
Air conditioning systems	Inspections by an energy assessor at regular intervals (not exceeding 5 years). Annual certificated inspection to ensure no refrigerant leakage. Bi-annual checks and an annual maintenance schedule (in line with good practice).	
Pressure systems	No fixed maintenance requirement	Programme takes account of the list on page 44 of the HSE's Safety of Pressure Systems guidance , and an examination of the system is carried out by a competent person by the date set at the previous examination (Ref. pages 35 to 37 of the HSE guidance)
Legionella checks on all water systems	Risk assessment of each site carried out and reviewed regularly by a competent person.	The frequency of monitoring checks varies for evaporative cooling systems, hot and cold-water systems and other risk systems – specific details can be found in guidance for each type from the HSE .
Asbestos	Regular inspections as part of the asbestos register and management plan. Reviews of the asbestos register annually.	Refurbishment and demolition surveys before any refurbishment or demolition work
Equipment used for working at height	Inspected before use, and at suitable intervals appropriate to the environment it's used in and how it's used	Additional inspections are carried out after anything that may affect the safety or stability of equipment, e.g., adverse weather or accidental damage

Issue to inspect	Frequency	Comments
Fire detection and alarm systems	Weekly alarm tests, with a different call point tested each week where applicable. Quarterly and annual inspections and tests. Annual fire risk assessment also includes the maintenance of fire detection and alarm systems	A competent person undertakes quarterly and annual inspections and tests and the annual fire risk assessment
Fire doors	Regular check	Undertaken by a competent person
Firefighting equipment	Most equipment – extinguishers, fire blankets, hose reels, fixed systems (such as sprinkler systems) and fire service facilities (such as dry risers and access for emergency vehicles) inspected annually unless manufacturers' guidelines suggest differently	Undertaken by a competent person where required
Extraction systems	Regular removal and cleaning of grease filters and cleaning of ductwork for kitchen extraction systems. Local exhaust ventilation systems (such as those for working with hazardous substances) examined and tested at least every 14 months.	Local exhaust ventilation systems inspections undertaken by a competent person. More routine checks also set out in system logbooks.

Issue to inspect	Frequency	Comments
Chemical storage	Inventories are kept up to date. Risk assessments for the Control of Substances Hazardous to Health (COSHH) are reviewed on a regular basis, plus whenever it's considered that the original assessment may no longer be valid, or where the circumstances of the work change significantly and may affect employees' exposure to a hazardous substance	In line with HSE guidance on COSHH assessment
Hydrotherapy pools and swimming pools	In addition to inclusion as part of the legionella checks, we follow the operation and maintenance guidance on pages 32 to 43 of the HSE's guide for spa-pool systems .	Swimming pools are subject to risk assessments and included in legionella checks and COSHH assessments.
Playground and gymnasium equipment	Regular inspections – at least annually, and more regularly where any equipment is used more frequently than normal (e.g. where community use increases how often equipment is used). Outdoor fixed play equipment – periodic and annual inspections	Outdoor fixed play equipment inspections undertaken by a competent person
Tree safety	As part of risk assessment responsibilities, periodic visual checks for stability are carried out, with more detailed assessments if suspected structural faults or other risks are found.	

Issue to inspect	Frequency	Comments
Radon	Risk assessments including radon measurements will be carried out in all of our above-ground workplaces in radon-affected areas, and all of our below-ground workplaces. Where measurements show radon levels below 300Bq/m³, radon levels will be remeasured at least every 10 years. If significant changes are made to the buildings or work processes, remeasurement will also be considered. For any sites with radon levels above 300Bq/m³ we will work with a radiation protection adviser to manage reduction and decide on risk assessment and remeasurement frequency.	Radon measurements will last for 3 months, using radon monitors, in line with Public Health England radon guidance for schools.

Appendix 2: School Condition Allocation (SCA) policy

Introduction

1. School condition funding is for capital investment in maintaining and improving the condition of the school estate and includes
 - Direct funding for individual institutions – Devolved Formula Capital (DFC)
 - Funding for those bodies responsible for individual institutions – School Condition Allocations (SCA)
 - Access to funding for academies not eligible for School Condition Allocations via the Condition Improvement Fund (CIF).
2. In order for Academy trusts to be eligible for SCA the following criteria need to be met:
 - The body had 5 or more open schools at the start of September 2021, and
 - Those open schools (or their predecessor schools) had at least 3,000 pupils counted in the spring 2021 census
 - For special and alternative-provision schools (including pupil referral units) the pupil count is multiplied by 4.5 for determining SCA eligibility. This is because these schools tend to have lower pupil numbers for their size and more complex facilities.
3. The advantage of SCA is that Capital Funding is received each year and capital works can be planned. The disadvantage is that the SCA provides a lower level of Capital funding than CIF which was a bid based funding mechanism although if bids were not successful then no Capital Funding would be received under CIF.
4. SCA will be received for the academy as a whole and will be applied to the highest priority areas across the academy based on an independent review and conditions surveys across all schools in the academy.
5. Current ESFA rules state that the MAT must spend the SCA allocation by the end of the next financial year (31st March). Unspent funds can be carried forward to the value of the following years SCA allocation

Scope of works (how SCA is distributed across the estate)

6. Whilst pupil numbers form a determining factor behind the allocation from the ESFA the age and state of repair of each academy will not be directly related to pupil numbers. Capital projects relating to the compliance, safety and condition of the buildings will be the primary criteria for any projects. Following the guidance of the ESFA the categories used for the identified works comprise:

- **Category 1 - Compliance - Health & Safety and Building Compliance;** fire protection, gas and electrical safety, emergency asbestos work, legionella, safeguarding, etc.
- **Category 2 - Condition - Building Condition:** roofing and weather tightness, structural weakness, heating or other pipework failure.
- **Category 3 – Improvement Projects – Projects on the Trust or academies wish list:** this could be reconfiguration to facilitate new ways of teaching, facelifts to improve the learning environment, making better use of external space, or any such projects of benefit to the individual school or wider trust.

Contingency

7. The nature of these items is such that planned maintenance and replacement will be the aim, but there will be occasions when outright failure occurs and emergency work is required. For this reason, an amount of money will be held as a contingency for emergency work that has not been planned for
8. It is anticipated that this will be no more than 20% of the total SCA allocation in any one year. The emergency funds will be retained centrally but will be notionally allocated to priority schemes. Once the following years allocation is released the contingency fund will be reviewed.
9. Unless circumstances are exceptional, IT Equipment will NOT qualify for funding via the SCA funding process.
10. SCA will not be awarded for routine maintenance works, for which revenue should be utilised unless financial circumstances require consideration.

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Assessment and prioritisation of works

11. In the first instance, the baseline information that will be used for assessment of each school will be a School Condition Survey carried out for each school. The surveys will take place every 5 years and identify the priority areas in each school and estimate costs over the five year period.
12. The condition surveys will identify the required work in schools according to a number of tiers. The tiers indicate the level of priority that is applicable to each piece of work and will be determined according to a number of factors such as health and safety, business continuity etc. Discussions with individual schools will also inform prioritisation of funding and works. Should the cost of tier 1 priorities exceed the SCA funding available the projects will be prioritised according to the following criteria:
 - The support of the scheme through additional funding (DFC/Revenue)
 - The value of previous capital projects carried out at the school (schools with lower levels of capital investment in the last 2 years will be prioritised).
 - The reduction in ongoing revenue expenditure that will be generated as a result of the project.

- The contribution towards achieving Eden strategic aims such as the need for improvements in educational outcomes or targeted MAT growth.
13. The use of health and safety and other compliance audits, for example asbestos, five years electrical, fire risk assessment will also be used to identify essential compliance work.
 14. Regular meetings with Heads will also identify areas within the condition survey reports that need prioritisation.

Authorisation of SCA projects

15. SCA spend will be approved through recommendation from the Asset Management Committee
 - a. A programme of works will be developed that will allow individual schools to know when they can expect to have funding for specific projects in categories 1 and 2.
 - b. Funding will also be set aside for emergency projects and if not fully utilised it will go back in to the fund and redistributed in the following year or used to carry out pre-emptive work to reduce the risk of future emergencies.
16. The assessment and prioritisation will determine how much is allocated to the various categories of work.
 - a. Funds available to schools through individual reserve balances will be taken into account.
 - b. The policy will also allow schools to consider their 'wish list' items and develop their plans.
 - c. The Trust recognises that there is a delicate balance between ensuring there is funding available for emergency works to be carried out when required, and utilising capital funds to improve the academies in order to avoid emergency works.
 - d. Funding decisions will be reviewed periodically by Finance Committee to monitor effectiveness of spend, reserves balances, and satisfaction with the policy.
17. It is the role of the Chief Operating Officer to oversee this programme.

Procurement

18. Procurement will be in line with the Eden Academy Financial regulations.

Annex B: Project approval form

To be approved by Finance Committee following recommendation from Asset Management Strategy Group	
Name of School	
Project Title	
Description of works and reference to Condition Survey Report	
Confirm financial regulation limits have been followed	
New Supplier Form required?	Yes ☐ No ☐
Contractor's Name	Net Amount (excluding VAT) <i>Please add comment if you are not taking the lowest quotation and why?</i>
1.	
2.	
3.	
Financial Liabilities (ex. VAT)	
A. Building works *	
B. Professional fees	
C. TOTAL	
Headteacher	
Name	
Signed	
Date	
Business Manager	
Name	
Signed	
Date	
Chief Operating Officer	
Name	
Signed	
Date	