

Diocese of Bath & Wells

VA School Asset Management Plan Guide

For Governing Bodies in VA schools

Claire Hudson, Education Department

Dear Governors

As you will no doubt be aware, VA school governing bodies have significant responsibility for many things about their school, and this document should help governors be clear about their responsibilities towards their estates, as well as help the staff working for you to deliver your vision in this area.

The government is looking for all VA schools to have an Asset Management Plan for their estate. Although your governing body retains full authority over the process, the diocese is keen to assist you and this document is provided to you as a suggested guide.

While your head's involvement will be crucial, the key people you will need to have on board are your business manager or bursar for budgeting purposes and the person with specific buildings and health and safety responsibility for the site.

The diocese is here to support you through this process, so please do reach out if you need support.

If you would like to read the Bath & Wells Schools Estate Asset Management Plan, please let me know and I will send you a copy.

Yours sincerely



Claire Hudson
School Organisation & Governance Adviser

What should be in an Asset Management Plan?

The contents of an Asset Management Plan are proposed as:

1. A statement from governors on how they will review and report on their estate at governing body meetings.
2. Details relating to the land at the school including land registry numbers, details of leases, etc.
3. The school's prioritised maintenance survey/condition survey
4. The school's compliance survey or a list of which compliance tests are done and when each was last completed.
5. The most recent health and safety/asbestos/fire safety reports. Any other relevant reports.
6. Any available energy and water management reports
7. The school's ambitions for their estate as detailed in their long-term School Improvement Plan
8. The school's strategic plans for their DFC.
9. A Caring for the Environment Statement, including ambitions and plans.
10. A one-page highlight sheet which will bring together the priority issues from each area of the AMP, sorted by the governing body into priority areas with potential sources of funding identified.

Items 1, 7, 8, 9 and 10 require governor action.

The diocese will provide a copy of the Property Information Form that they hold, and copies of land registry documents to cover Item 2.

Items 3-6 should be collected by the person responsible for holding them (and likely to be the person responsible for maintaining the AMP).

Actions

Item 1: How will your school review and report on their estate?

This should be an agenda item for your first meeting discussing the AMP. Governors should discuss:

- What are our responsibilities?
- Are we confident we know what they are?"
- How do we think we should review and report on our estate at governing body meetings this year?

The clerk should note:

- The discussion.

- The decision, including which meetings.
- Actions and delegations. This should include an action to the clerk to add to the relevant agendas for agreed meetings.

The above information should be added to a document, which will also include:

- The paid member of staff who oversees estate matters.
- Which governor(s) are delegated to monitor the oversight of the estate
- The person responsible for maintaining the AMP and the relevant documents within it. It is recommended that this is a paid member of staff.

Item 7: Long term planning

This action should be at a standalone meeting, not a regular FGB meeting. This can be facilitated by a diocesan adviser.

Governors should consider and discuss:

- Any changes likely to impact their school over the next 5-10 years (e.g. new housing estates, falling rolls, transport, rurality, etc.). Will the school grow or get smaller? Are budgets going to necessitate academisation/sharing a head, etc.?
- Taking these views into account, what ambitions do you have? What plans do you need to make? What areas of the school would they like to see improved or changed? It would be worth having copies of the Prioritised Maintenance Survey available so governors can see what work is currently identified as needed at their school.
- Governors might like to ask the head to do this exercise with their staff ahead of the governors' meeting, and share the results with governors after they have discussed the two items; governors should then consider areas of similarity and difference and agree a cohesive list of ambitions for the future.

These discussions should be set out in a document.

Example

A village school in a 1930s building with falling roll due to Ofsted category.

Governors' ambitions for the future:

- To be a Good school delivering excellent education
- To be full – the school of choice for local parents.

To be a Good school delivering excellent education, as well as a school of choice, we have a School Improvement Plan that details how we will be improving teaching and learning.

We recognise that becoming an academy or federating with another school is likely to become necessary due to budgetary considerations and we have set up a working group to explore all options. This is also referenced in our SIP.

To be full and the school of choice for local parents, we feel we need to make the following improvements to our school estate:

- Refurbish currently shabby classrooms, including replacing flooring, blinds, furniture and white board.
- Make the corridors less institutional and more welcoming.
- Extend and improve Forest School.
- Replace the dilapidated toilets
- Improve the Reception outside area and replace the canopy.
- Have a Heat Decarbonisation Plan as we need to replace inefficient radiators (possibly replacing the entire heating system) and want the most environmentally friendly system possible.
- Explore how we can ensure all our energy needs come from renewable sources.

Item 8: Strategic planning for your DFC

Governors should ensure that their DFC is used strategically. You should consider:

- Running repairs
- Decoration
- Carpets, blinds, etc.
- Replacement furniture
- IT refresh, both for children and staff
- Replacement whiteboards
- Emergency works
- Anything identified in Item 7 that is not eligible for School Condition Allowance

Ideally you would plan for a rolling programme of decoration, replacing carpets/blinds/furniture, and planning IT refresh and replacement whiteboards as they come to the end of their life, as well as leaving some contingency funds for emergencies.

Remember, DFC projects must be £2000 or more.

It is recommended that this becomes part of your budget setting process and is monitored in the usual way. This does mean that there is less opportunity for ad hoc purchasing, but in the current funding situation, this is probably useful.

Item 9: A Caring for the Environment Statement.

Church schools should be 'courageous advocates' for climate change according to the SIAMS expectations and considering your estate as part of this work is essential.

Governors should be aware that all VA schools are counted within the Church of England's carbon footprint and are therefore part of our Net Zero commitment. Governors are encouraged to review the Diocese of Bath and Wells Environmental Policy and the commitments the diocese have made as well as the Education Department's Action Plan.

For the purposes of your Asset Management Plan, your Caring for the Environment Statement can just be about your estate, or could be part of a larger piece of work the school does to encompass teaching, learning and behaviours.

A Caring for the Environment Statement should include:

- What has been done so far at their school, including measures that have been taken so far as regards their estate, if known, including LED lights, insulation, energy efficient boiler and solar panels.
- A commitment to be carbon neutral by 2030. To achieve this:
 - Download the school's carbon footprint, which is available online.
 - Engage with the Church of England Schools' Energy Footprint Tool, which is being released shortly.
 - Work with the diocese to create a Heat Decarbonisation Plan for the school.
- A commitment to consider biodiversity when planning how your school grounds will be maintained.
- A consideration of what risks, if any, climate change may bring to your school – are you in an area where flood mitigation might be needed, for example?
- The commitment to good stewardship through ethical and eco-friendly procurement choices.
- A commitment to not using single use plastics (with the exception of essential medical items and PPE) by 2025 and the creation of a policy to reflect this.

Consider using tools like Eco Schools or Let's Go Zero to help you achieve your targets.

Explore partnership links with their local church or other community organisations committed to Net Zero by 2030.

Support is available for this work, via training and our Diocesan Environmental Officer.

Item 10: The one-page highlight sheet.

This will bring together the priority issues from each area of the AMP, sorted by the governing body into priority areas with potential sources of funding identified. This will be updated each year.

Potential funding streams include: School Condition Allowance (SCA), Devolved Formula Capital Grant (DFCG), school budget, Local Authority grants, and fundraising (PTA, charitable grants, etc.).

2021-22 Priorities	Project	Potential funding
Governors' strategic priorities for the estate		
Identified priorities in the Prioritised Maintenance Survey		
Identified priorities in H&S/ Fire, etc., reports (if not in PMS)		
Identified priorities for DFCG		
Environmental priority		