



The Sutton Academy

Estates Strategy Policy

Status	Non-Statutory
Responsible Trustees' Committee	Finance & HR / Full TB
Date last approved by TB	20/06/2023
Responsible Person	Paul Blakemore
To Review Date	June 2024
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The Sutton Academy will become part of 'The Challenge Academy Trust' (TCAT) during the latter stages of the 2023/24 academic year. At this point, the TCAT trust-wide policy will be adopted.

For the period between the lapse of this current policy date and the imminent partnership with TCAT, this policy will remain as valid for The Sutton Academy and all stakeholders.

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1. Introduction

- 1.1. The academy's estate strategy sets out the key principles for developing the academy's estate in line with its academic objectives over the period 2023 to 2028. It reflects on key challenges facing the academy including issues around efficiency and sustainability, and outlines future developments that are underway or in the pipeline. It identifies the Academy's priorities in line with which decisions about maintenance and refurbishment of its estate are being made.
- 1.2. In accordance with the DfE's "Good Estate Management for Schools" there are four core elements to the Estate Management Plan. These are:
 - Estate Vision
 - Estate Strategy
 - Asset management Policy
 - Asset Management Plan
- 1.3. The strategy will remain in place until 2028, subject to discretionary review by the Board of Trustees.

2. Aim

- 2.1. The aim of the Estate Management Plan is to provide facilities that are safe, excellent, inspiring and promote great learning and teaching opportunities that are pivotal in securing the best outcomes for our students

3. Key facts about the academy

- 3.1. Mixed Gender Secondary Academy accommodating 11-18-year olds
- 3.2. Current Number on Roll is 1,419
- 3.3. The Academy is in high demand and due to demographic pressures with local residential growth, pupil numbers are set to increase over the next 3 years in the lower school, similar to 2019 - 2022. There has been an increase in students in the 6th form and this is likely to continue over the next 5 years, due to the larger year groups coming through the academy
- 3.4. The last Ofsted inspection in December 2022 rated the Academy as Good

4. Key facts about the estate

- 4.1. 7 buildings of various ages with the core of the academy contained within a SCOLA building developed in the 1970's. Further buildings have been added including the administration and Technology block, which were built and refurbished as part of a Building Schools for the Future (BSF) Program in 2012. The Land and Buildings (both leasehold and freehold) were valued at £21.2m in 2015.
- 4.2. Buildings provide 91 general classrooms, including 11 science laboratories; specialist facilities for art, Design Technology, Food Technology, Music together with a Library. There is also a Dance Studio, Arts Theatre and Dining Hall & Kitchen. There is currently no provision for PE, which is hosted in the neighbouring Council run Leisure Centre at a cost of £173,564 (April 2022/23).

5. Land & Buildings ownership

- 5.1. The Sutton Academy was originally a St Helens Council secondary school built in 1975, which achieved 'Sports' status
- 5.2. In 2009 the school converted from 'Maintained' to 'Academy' status. A 125 year lease has been drafted and once finalised will be submitted to the Secretary of State for final approval.
- 5.3. BSF only provided a new build for the Administration function and some classrooms. A roof was added between two existing blocks to form the Design Technology wing. A feasibility study was carried out in Spring 2021 to identify areas where additional teaching and social spaces could be constructed within the current site foot print.

6. Estate Strategy priorities

- 6.1. Provide a safe, functional and stimulating environment for our pupils and staff to learn and develop.
- 6.2. Optimise the utilisation of existing teaching spaces for flexibility and shared use.
- 6.3. Meet the increasing demand for lower school places in our local catchment area
- 6.4. Improve the condition and functional suitability of the estate by re-purposing existing buildings.
- 6.5. Ensure a programme of preventative maintenance is planned and implemented
- 6.6. Reduce running costs and carbon emissions across the estate
- 6.7. Secure financial funding to support required refurbishments

7. Challenges

- 7.1. The Education sector is reliant on ESFA funding and as a whole faces significant reduction in both real term revenue and capital funding
- 7.2. Maintaining inefficient buildings
- 7.3. Increase in student numbers due to an increase in the local population

8. Current issues

- 8.1. A, B, C, D, F and canteen blocks are thermally inefficient with many windows single glazed, heat loss due to poor roofing and insulation and 'old-style' heating in many blocks.
- 8.2. A Block has no pupil toilet facilities. There are only two entrance/exits causing bottlenecking for the 24 classrooms in there. There are narrow staircases to the 5 classrooms upstairs. Whilst this block has double glazing, heating is mainly via inefficient convector heaters. A complete rewire was carried out of A block in 2020, which included new LED lighting, new sockets throughout and additional sockets in selected areas
- 8.3. B & C Blocks are singly glazed but have the benefit of a new heating system, which can be controlled via a BMS. The 8 upstairs classrooms in B block are accessed via narrow staircases.
- 8.4. In August 2019 B, C & S block underwent a complete rewire, which included new LED light fittings with dimmer switches and new power sockets
- 8.5. D Block is again single glazed and is heated via convector heaters.

- 8.6. F Block is double glazed but has one very narrow corridor.
- 8.7. 1 Food Tech classroom is too small and needs expanding. Bids are in the region of £20k
- 8.8. Approximately 50% of the estate has the original inefficient light fittings
- 8.9. Traffic restrictions required to separate pedestrians and vehicles and prevent ad hoc parking on the pavement between Main Block, Art Centre, Leisure Centre and the car park, thus reducing the risk of injury. This could also target harden the Academy under the Prevent Strategy.
- 8.10. The perimeter fence at the rear of the Academy is too low and requires an upgrade.
- 8.11. The Leisure Centre could be closed, which would leave the Academy unable to provide PE or hold exams on site, as the two Sports Halls are currently used.
- 8.12. The lifts in A & B blocks are 40 years old, regularly break down, have no diagnostic fault-finding system and need replacing.
- 8.13. Approximately 90% of the original roofs have now been replaced. A successful CIF bid in 2022 allowed to replace the roof on A and C block
- 8.14. The majority carpets in A & B block have now been replaced. C, E & F block need an upgrade to make them more modern. It is roughly £1,500 per classroom.
- 8.15. The window blinds are of poor quality and are prone to the plastic parts malfunctioning. Investment required to replace for a better quality product with a 10-year guarantee
- 8.16. 2 out of 3 stairs have had the floor covering in 2019. The remaining one isn't used regularly, so the condition of it will be monitored.
- 8.17. The floor of the covered walkway is of a poor nature, is very difficult to clean and could be a food source for mice.
- 8.18. Hot water heaters installed in the build are starting to fail. There are approx. 15 on the site.

9. Efficiency & Sustainability

- 9.1. Building condition and functional suitability (fitness for purpose) are two of the most important factors to be considered in determining investment in the Academy's estate. The academy is responsible for the upkeep and general repair of the buildings as well as cyclical property servicing, testing inspection and survey schedules.
- 9.2. Currently, the Academy sets aside an allocation each year for investment in capital expenditure projects.
- 9.3. Capital Expenditure should categorise priorities as follows.
 - Priority 1: Urgent work that will prevent immediate closure of premises and/or address an immediate high risk to the Health & Safety of occupants and or remedy a serious breach of legislation
 - Priority 2: Essential work required within two years that will prevent serious deterioration of the fabric or services and/or address a medium risk to the health & safety of occupants and/or remedy a less serious breach of legislation.
 - Priority 3: Desirable work required within 3 to 5 years that will prevent deterioration of the fabric or services and or address a low risk to the health & safety of occupants and /or remedy a minor
 - breach of legislation

Prioritised Report for TSA

Element of Liability	Priority 1	Priority 2	Priority 3	Total Costs
Electrical services	£500,000 (A&B) Complete	£250,000 (D&E)		£750,000
Mechanical services		£50,000 (Lifts)	£250,000 (A&D Heating)	£300,000
Redecoration		£31,000	£25,000	£56,000
Windows (CIF)	£240,000			£240,000
Roof (D block)			£100,000	£100,000
Canteen			£250,000	£250,000
Expansion - Additional Art classrooms (Phase IV)	£668,235			£668,235

- 9.4. The condition of the academy's internal fixtures and fittings and external areas are the academy's responsibility and are identified in the Academy's Capital plan.
- 9.5. Other areas targeted in the academy were to improve the welfare of our pupils and staff with the IT classrooms and Main Office fitted with air conditioning. The whole site has been fitted with external door access control.
- 9.6 The Academy is committed to minimising the environmental impact of its activities.
- 9.7 The Academy will ensure that any new building or refurbishment is planned, built and occupied to ensure the greatest energy and water efficiency and the lowest carbon emissions.
- 9.8 The Academy will endeavour to purchase products and services that reduce the environmental impact.

10. Approved/Projects Pending Approval

- 10.1. Replacements LED lights in D, E & F blocks – circa £40,000
- 10.2 Refurbishment of Food Technology Classroom to address an increase in pupil numbers (circa £20,000)
- 10.3 Install solar panels - £ 336,225 + £40,000 provision (pending completion of lease and then ESFA approval)
- 10.4 Phase IV expansion Project. Creation of 2 Art classrooms £668,235 (approved in principal pending ESFA & Trustees approval)

11 Key financial information

- 11.3.1 The Academy has currently set a budget of approximately £50,000/ year within the 5-year repair and maintenance programme. The estate budget for 2022-23 is £882,205, which includes a repairs/improvements budget of £39,300.
- 11.4 The 5-year repair and maintenance programme priorities are reassessed annually and subject to the Academy maintaining at least a balanced revenue budget. An updated 5-year Capital plan will be required to capture the current challenges and opportunities facing the Academy.
- 11.5 The six funding streams and arrangements that are available for capital projects are detailed in appendix 1.

12 Future developments and successful CIF bids

12.3 The academy is working in partnership with Lancaster Maloney Martin in submitting CIF bids to improve the existing facilities through refurbishment.

- **CIF bid 2017-18 – Complete**
Roof Refurbishment
- **CIF Bid 2018-19 - Complete**
Rewire of B, C & S blocks
- **CIF Bid 2019-20 - Complete**
Rewire of A block
- **CIF Bid 2020-21 - Complete**
Fire precaution works
- **CIF Bid 2021-22 - Complete**
Roof refurbishment on the remaining sections of the original buildings
- **CIF Bid 2023-24 – Approved in Principle**
Construction of 2 new Art rooms

12.4 Completed expansion projects (funded from reserves)

- 1 new science room built at the rear of a block
- 2 new classrooms built in B block by converting BG15& 16 into 4 rooms

12.5 Capital plan 2023-2026

- New carpet programme
- Painting and decoration
- Refurbishment of toilets in B Block
- Refurbishment of toilets in the Arts theatre
- New stage lighting in the Arts theatre
- Expansion/reconfiguration of Sixth Form
- Expansion of Science

13 Statutory Compliance

- 13.3 All compliance testing and inspections are carried using external contractors and inhouse staff. All records are stored on the TSA IT network
- 13.4 All servicing is booked when they are due and carried out accordingly.
- 13.5 The Estates manager will be responsible for ensuring that estates staff are undertaking appropriate checks and monitoring.

14 Ongoing Maintenance

- 14.3 The Estate Manager manages the site team and ensures that their workload is manageable. The site team manage the site on a day-today basis and will escalate any issues that require funding to the Chief Financial Officer.
- 14.4 The Chief Financial Officer will ensure that sufficient funding is available to manage any statutory compliance as well as any repairs and maintenance required. This funding is agreed at the start of the financial year.
- 14.5 Building maintenance issues a raised by staff using the Parago online system and allocated to the site team. These will be dealt with in order of priority. If the site team are unable to carry out the work, they will escalate to the Estate Manager who will contact a specialist contractor if required.
- 14.6 The site team will complete a programme of works such as decorating or preventative maintenance, this is usually completed during the school holiday.
- 14.7 Due diligence will be undertaken on any contractors employed on site. This includes, DBS checks, risk assessments, method statements, accreditations and financial details. All certificates of completed works should be used on completion of the work.

Appendix 1: Funding streams and arrangements

There are 3 funding streams and arrangements available for capital projects; these are:

- **Devolved Formula Capital (DFC)**

Annually, funding is available from Devolved Formula Capital (DFC) given direct to the academies for use in small-scale capital works. DFC is direct funding for institutions to maintain their buildings and fund small-scale capital projects, primarily ICT replacement plans.

The DFC allocation for 2021-22 is £28,218.

- **Academy Reserves**

The academy's reserves policy provides for capital projects that enhance the educational provision.

- **Condition Improvement Fund (CIF)**

A bid can be submitted for any major condition or health and safety issue. A maximum of 2 bids can be submitted annually. The bidding round for CIF usually open in November and closes in January. The Sutton Academy engage the services of a professional property management company with experience in successful CIF bid submissions to prepare professional submissions and ensure that it fits with the CIF criteria and submit the bid on the Academy's behalf.

Should an emergency arise outside of the bidding period, there is the ability to make an emergency submission to the CIF for any works needed that have Health and Safety implications i.e. there is a significant risk of causing harm.

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