

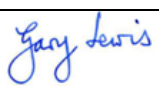


LIGHTHOUSE

SCHOOLS PARTNERSHIP

ESTATES VISION AND MANAGEMENT STRATEGY

Statutory

Policy Approved by the Board of Trustees	
Signed:  Name: Adele Haysom Chair of Board of Trustees	Date: 10 June 2026
Authorised for Issue	
Signed:  Name: Gary Lewis Chief Executive	Date: 10 June 2026

Document History

Version	Author/Owner	Drafted	Comments
1.0	Louise Malik		Original policy
2.0	John Finch	April 2026	Policy review

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This strategy applies to all schools within the Lighthouse Schools Partnership.

This policy remains valid, and in operation, until a new or updated policy is published.

ESTATES VISION AND MANAGEMENT STRATEGY

Statutory

1. Introduction

The Lighthouse Schools Partnership Estate Vision and Management Strategy set the high-level strategic framework for managing our estates portfolio effectively. It guides our future strategic estates decisions to ensure that we provide the best possible learning environments and manage our estate sustainably, efficiently, remaining fit for the future.

This policy has been developed in line with the DfE's estate management standards and guidance.

2. The estate vision

The vision for our school estate is used to provide the strategic direction and culture under which our estate will be managed. It is inextricably linked to our [Strategic Plan](#) and priorities, as detailed below:



Our vision is to provide the best possible learning environments for our students and colleagues. The quality of the learning environment is crucial to achieve our strategic priorities. The needs and demands of delivering high quality education are evolving and changing rapidly. It is important that our approach to estates management remains relevant, innovative and flexible enough to respond to the changing needs and priorities of our schools, the pupils that attend them and the communities they serve. This strategy sets out how we will achieve this.

However, resources are limited and therefore need to be prioritised. The highest priority for investment will always be to ensure that our estate is safe, warm and dry.

We will strive to achieve best value for every project that we undertake.

Our estates vision is also linked to our [carbon reduction plan](#) and as we invest in our estate we will consider all actions that we can take to reduce our carbon footprint and progress towards our aim of carbon neutrality. Our priority for investment will be projects that both reduce carbon outputs and reduce estate running costs.

3. The estate

The Lighthouse Schools Partnership estate is significant. The land and buildings owned/leased by the Trust valued at approximately £100m. Schools owned by the appropriate Diocese are valued in addition to this.

Our 34 schools span a geographical area of North Somerset, Bath and North East Somerset and Bristol. They vary significantly from small rural schools with a planned admission number (PAN) of 10 pupils each year, to large town based secondary schools with a PAN of 336. Some of our estate is relatively new. For example, Yatton Infant school was mostly rebuilt in 2025 following a devastating fire. Some schools are based around building from the Victorian era, but many were built during the period 1950 to 1980 and present some significant condition issues.

The Trust receives an annual School Condition Allocation (SCA) and Devolved Formula Capital (DFC) allocations from the DfE of approximately £2.6m and £320k per annum respectively. In addition, revenue resources are also allocated for routine maintenance and compliance. The routine maintenance and compliance amounts to approximately £2.5m per annum.

DfE condition data identifies an additional weighting to the SCA funding that we receive for about 30% of our schools due to their relatively poor condition.

4. Goals and objectives

The two overarching goals for our estates strategy are to:

- 4.1. Provide the best possible learning environments, and
- 4.2. Ensure that our estate is safe, warm and dry.

Within these two overarching goals there are a number of objectives:

- 4.3. Enabling our estate to be as inclusive as possible,
- 4.4. Support innovation to find the best solutions to meet the educational and wellbeing needs of our students and staff, utilising new technology, within our financial constraints,
- 4.5. Implement sustainability improvements, reducing costs for schools and moving closer towards our carbon neutral goal,
- 4.6. Prioritise highest risk assets for maintenance, renewal, or replacement,
- 4.7. Developing our estate to improve security, behaviour and to support school attendance,
- 4.8. Achieve the best possible value for money as we invest in our estates, utilising lifecycle planning,

- 4.9. It future proofed as far as possible to meet the changing needs of our students, schools, communities and the Trust itself,
- 4.10. Where possible, support options to use our estate for the wider benefit of our communities and partners.

5. Organisational Framework

Responsibility for the management of our estates is demonstrated in the table below:

Body/Post	Responsibilities	Delivered by:
Board of Trustees	The Board of Trustees has strategic, legal, and financial responsibility for the safety, maintenance, and development of our school estate. While they do not manage the premises on a day-to-day basis, they are responsible for ensuring that the Central Team has robust policies, procedures, and resources in place to keep buildings safe, compliant, and suitable for learning	• Following a new/updated strategic plan, agreeing an updated Estates Vision and Management Strategy and Asset Management Plan • Agreeing an updated Estates Vision and Management Strategy and Asset Management Plan every 3 years • Every 5 years, following new condition/M&E surveys, reviewing the estates condition, investment, risk and updating the Asset Management Plan • Reviewing the Trust's carbon emissions per pupil to monitor progress toward carbon reduction aims - every year (December), • Setting capital budgets for the coming financial year and draft capital budgets for the next two years - every year (July), • Agreeing an update to the Asset Management Plan with a specific focus on updates to the plans for the next two years - every year (spring), • Agreeing an update to the self assessment of the Trust against the School Estates Management Standards - every year (spring), • Receiving and challenging compliance & H&S

		performance - three times per year • Receiving and challenging spend to date and forecasted spend for capital budgets - monthly • Approving expenditure/contracts for capital spend as required by the Finance Policy
Chief Executive Officer (CEO) and Chief Financial and Operating Officer (CFOO)	The CEO is tasked with strategic leadership and operational oversight to ensure the school buildings provide a high-quality, sustainable, and safe environment for education. This leadership and oversight is delegated to the CFOO to deliver	• Delivering, reviewing and updating the estates vision and management strategy • Proposing and reviewing progress of the asset management plan (annually) • Monitoring the performance of estates functions and health and safety in schools(3 times per annum). • Authorising plans to spend, in line with the Finance Policy but delegating decision making for spend within the agreed capital programme of up to £100k to the Head of Estates
Head of Estates (with support from the Estates Team)	The Head of Estate (with support from the Estates Team) will deliver the estates vision, strategy and capital programme.	• Supporting the delivery the estates vision and management strategy • Developing and delivering the asset management plan (annually) • Authorising spend of up to £100k within the agreed capital programme • Delivering, monitoring and reporting the performance of estates functions and health and safety • Supporting Headteachers to delivery their estates responsibilities • Supporting and challenging Headteachers to prioritise resources to meet their estates and health and safety needs
Headteachers	Headteachers are responsible for delivering an estate development plan for their school(s) to support the	• Developing and delivering their estates development plan

	delivery of their overall school development plan. Headteachers have day to day responsibility of the health and safety of all users of their school(s)	• Delivering and monitoring the performance of estates functions and health and safety in their school(s) • Prioritising resources (revenue and DFC) to meet their estates and health and safety needs
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6. Producing the Asset Management Plan

The Asset Management Plan is a working document which informs our operational day to day activities in relation to our estate.

It includes data and information about the estate and the details on the maintenance and compliance programmes required to ensure that we achieve our goal of 'Safe, Warm and Dry'.

The Asset Management Plan also includes the 5 year rolling capital programme of planned investment in our estate. The capital programme is mainly funded by the Trust's school condition allocation and needs to be spent in line with the conditions of the grant. School condition funding is for capital investment in maintaining and improving the condition of the school estate. The funding is intended to be prioritised on keeping school buildings safe and in good working order by tackling poor building condition, building compliance, and health and safety issues, and improving environmental sustainability.

The CFOO, supported by the Head of Estates, will produce the Asset Management Plan and the capital programme and propose it to the Board of Trustees for approval. The capital programme will be updated as necessary and reviewed by the Board of Trustees annually and reproduced every five years.

The capital programme will be produced in line with this policy. It will prioritise projects based on the following (in order of priority):

- 6.1. Emergency works. Despite the planned capital programme, there will be occasions when unexpected failures occur 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. It is anticipated that no more than 10% of the total SCA allocation will be held for this purpose in any one year. These issues may be identified as part of routine compliance activity (such as health and safety and other compliance audits, asbestos inspections, fixed wire testing, fire and legionella risk assessments) or reported by schools;
- 6.2. Building and mechanical and electrical (M&E) condition data. This information will be gathered for each school by an external surveyor appointed by the Central Team. The surveys will be undertaken at least every 5 years and the cost of the surveys will be met by the SCA. The surveys will estimate costs for the various works identified and prioritise on a scale from immediate to longer term work required outside of the 5 year planning period. It also enables the cyclical replacement of elements of the estate, such as boilers, in line with their life expectancy; Items identified on the

condition surveys as have bad or poor condition, with a priority rating of 1 or 2 will be prioritised;

CONDITION RATING MATRIX		PRIORITY RATING MATRIX	
Definition	Condition Score	Priority Rating	Definition
Life expired and / or at serious risk of imminent failure	D - Bad	1	Urgent - Prevent immediate closure of premises; and/or address an immediate high risk to the health and safety of occupants; and/or remedy a serious breach of legislation.
Exhibiting major defects and / or not operating as intended	C - Poor	2	Essential - Work required within the short term to prevent serious deterioration of the fabric or services; and/or address a medium risk to the health and safety of occupants; and/or remedy a less serious breach of legislation.
Performing as intended but exhibiting minor deterioration	B - Satisfactory	3	Desirable - Work required within the medium term to prevent deterioration of the fabric or services; and/or address a low risk to the health and safety of occupants; and/or remedy a minor breach of legislation.
Performing as intended and operating efficiently	A - Good	4	Long Term - Work required within the long term that will prevent deterioration of the fabric or forming part of the life cycle as the building, plant and fabric ages.

- 6.3. Carbon reduction and energy efficiency measures such as additional insulation or LED lighting;
- 6.4. The Trust's strategic priorities. This could, for example, include improvements to facilities to improve school attendance or a programme of proactive asbestos removal. The amount of funding for this purpose will be determined annually and will depend on the funding available and the cost of addressing the most serious condition issues in our estate. The funding available for this purpose will not exceed 10% of the total SCA allocation each year;
- 6.5. Schools strategic priorities. There are likely to be eligible projects that could have a huge impact on the outcomes or wellbeing of children and young people, or staff, that are not likely to be identified for funding for a considerable number of years. A small proportion of SCA funding will be set aside for these more developmental projects. The amount of funding for this purpose will be determined annually and will depend on the funding available and the cost of addressing the most serious condition issues in our estate. The funding available for this purpose will not exceed 10% of the total SCA allocation each year. Schools can apply for additional projects on an annual basis;
- 6.6. Contribution to major projects. There are very few opportunities to apply for additional capital funding for major projects such as whole school or block replacements. Funding may be prioritised to create a capital reserve for future major projects within the grant conditions. The amount of funding for this purpose will be determined annually and will depend on the funding available and the cost of addressing the most serious condition issues in our estate. The funding available for this purpose will not exceed 10% of the total SCA allocation each year.

The expectation is that most items identified on the condition surveys will be funded by SCA. However, smaller items, under £5,000, or items that relate to day to day maintenance, will not be funded by SCA but by schools revenue budgets or DFC.

Items prioritised for the first 2 years of the capital programme will be shared with individual schools on an annual basis to aid their planning. Priorities due to be addressed in future years are much more likely to be subject to change.

The funding set aside for emergencies, improvement projects and contributions to major projects, if not fully utilised, will go back into the fund and be either redistributed in the next refresh of the capital programme, or used to carry out pre-

emptive work to reduce the risk of future emergencies.

Permission is required from the appropriate Diocese for change to sites that they own. Achieving this permission could impact on the delivery of the capital programme.