



Department
for Education

Capital Advisers Programme

Pilot revisits and part 1 evaluation

November 2023

Contents

The Capital Advisers Programme (CAP) pilot revisits and part 1	2
Introduction	2
CAP pilot revisits and part 1	2
Aims and objectives	3
Evaluation methodology	4
Findings	7
Key insights from the CAP pilot revisits	7
Key insights from CAP part 1	8
Conclusions	11
CAP pilot revisits	11
CAP part 1	11
Next steps	12
Annex	13
Pre-engagement and post-engagement questions	13
Advisers' assessment results	21

The Capital Advisers Programme (CAP) pilot revisits and part 1

Introduction

The Capital Advisers Programme (CAP) is part of the department's aim to deliver world-class outcomes for children through excellent estate management. A school building is more than just a building. It is a system that supports teaching and learning, helping to build the future of our next generation.

CAP is designed to help academy trusts increase their estate management capability and improve practice by offering bespoke best practice recommendations from experienced capital advisers, in line with the [Good Estate Management for Schools](#) (GEMS) guidance. This will help academy trusts to make more efficient spending decisions, improve building safety, and better manage their accountability and statutory responsibilities for their school estate.

CAP pilot revisits and part 1

The programme was set up in 2021 and delivered the pilot project from March 2021 to July 2021. The pilot evaluated whether, and in what circumstance, an assessment by accredited¹ capital advisers, using the [school resource management advisers](#) (SRMA) programme model, could improve how multi-academy trusts (MATs) strategically manage their estates and make the best use of their [school condition allocations](#) (SCA).

The pilot considered the effectiveness of estate management processes and practices in place across the 20 participating MATs. It explored the need for tailored advice on strategic estate management and capital spending and whether involvement with CAP resulted in MATs improving their processes. As part of this, the pilot also looked at the completeness and effectiveness of estate management processes and practices in place within MATs.

¹ Capital advisers deployed in both the pilot and part 1 hold relevant qualifications or equivalent relevant experience, along with evident involvement in the school education sector for a minimum of 2 years, in addition to significant experience in estate management. Capital advisers deployed needed to hold one of the following qualifications, or be able to evidence equal relevant experience:

- Associate Member of Royal Institution of Chartered Surveyors (RICS) (AssocRICS) or Member of RICS (MRICS)
- Institute of Workplace and Facilities Management (IWFM) Level 6 or above
- Associate Member of the Chartered Institution of Building Services Engineers (CIBSE) (ACIBSE) or Member of CIBSE (MCIBSE)
- Chartered Engineer (CEng)

Following the initial visits, all 20 pilot academy trusts were revisited by a capital adviser from September 2022 to November 2022. The revisits were an opportunity to review and assess behaviour changes as well as identify and assess the impact and benefits of the programme. Indicators from the pilot suggested that a wider rollout of the programme, which promotes best practice in line with GEMS, would be beneficial for academy trusts.

CAP part 1 started in September 2022, with delivery completed in March 2023. Part 1 increased the sample size to 50 academy trusts and included both single-academy trusts (SATs) and MATs with high condition need estates. The programme focused on providing recommendations and advice to improve estate management capability and practice, make best use of capital funding and improve building safety. Academy trusts were chosen through a process similar to the method used in the pilot, with a deliberate emphasis on factors such as condition need, trust maturity, trust size and location. This stratified random selection approach ensures data is captured across all parts of the sector. The increased sample size, combined with the types of academy trusts selected to participate, will help to build an evidence base on trust capability and practice and continuously strengthen the impact and benefit of the CAP offer.

Aims and objectives

How school buildings are maintained and managed has significant safety and cost implications for academy trusts and estate management capability. Estate management practices and related efficiencies can be inconsistent in the sector. CAP aims to assess whether capital advisers could coach and support academy trusts to strengthen their approach to strategic estate management and making best use of their capital funding.

The programme explores the need for bespoke advice and practical steps to implement recommendations based on strategic estate management. CAP aims to support academy trusts participating in the programme to improve their overall estate management capability and practice and achieve better delivery, efficiency, and safety.

The Capital Advisers Programme objectives are to:

- Support academy trusts participating in CAP to improve their estate management capability and practice and achieve tangible delivery and efficiency benefits.
- Build the DfE's understanding of estate management capability and practice in the school sector.
- Build the DfE's understanding of financial and delivery impact of good estate management and CAP advisers' recommendations throughout the programme.

Evaluation methodology

The impact CAP has had on participating academy trusts has been evaluated using a mixed methods approach. For the revisits, impact has been measured by analysing how many of the recommendations have been completed a year later and whether academy trusts still intend to implement uncompleted recommendations based on their post-engagement questionnaire responses. Although there is no fixed time applied to the advice capital advisers provided to academy trusts, this gives an indication of the impact the programme has had on academy trusts to date and not the full impact of the programme.

For part 1, impact has been measured by intended improvements in estate management compliance measured by a pre and post engagement questionnaire and data collected on estimated savings expected as a result of the programme's recommendations across energy, project delivery and the management and operation of their estate. The effect resulting from academy trusts already using GEMS against those that do not, has also been assessed.

The framework for the CAP pilot revisits and part 1 was adopted in line with the initial pilot programme and the GEMS guidance, as well as including tailored focus areas on how academy trusts manage their estate and budgets. As part of the programme, capital advisers gave practical advice, made recommendations, and shared best practice to support academy trusts, based on GEMS and their wider experience, covering the following key sections:

- Section 1 – strategic estate management
- Section 2 – understanding and managing land and buildings
- Section 3 – performance management and sustainability
- Section 4 – managing estate projects
- Section 5 – maintaining your estate

As part of the revisits' process, each of the 20 academy trusts that participated in the pilot were invited to complete a pre-engagement questionnaire issued to the trust prior to the engagement meeting. This captured key information and enabled capital advisers to gain an initial overview of progress made since their individual pilot recommendation report in 2021. The questions can be found in Annex pre-engagement and post-engagement questions. Pre-engagement response options were coded as:

- Yes = 100% (the trust has this in place therefore scoring 100%)
- In-part = 50% (the trust partially has this in place therefore scoring 50%)
- No = 0% (the trust does not have this in place therefore scoring 0%)

Following the pre-engagement questionnaire responses, capital advisers visited each of the 20 academy trusts and held discussions around the 5 key sections of the programme. These meetings offered an opportunity to capture academy trusts' progress since the pilot recommendations, discuss best practices and outline an updated action plan of recommendations, tailored to their specific requirements.

Capital advisers captured qualitative and quantitative data to produce a report for each participating trust about their estate management practices. As part of this, the advisers assessed academy trusts' performance across these 5 sections again using the values "Yes", "In-part", or "No" if the trust was adhering, partially adhering, or not adhering to GEMS good practice, respectively. Where the trust was given an 'in-part' or a 'no' for any sections of the capital adviser report, the trust would be given a set of recommendations to guide and support them to achieve a 'yes' status, leading to better overall estate management.

CAP part 1 followed a similar approach where each of the 50 academy trusts that participated in the programme were invited to complete a pre-engagement questionnaire prior to the engagement meeting to capture how they managed their estate. Following the programme, they were asked corresponding questions to understand whether the recommendations given by capital advisers would be implemented in these areas. The questions can be found in Annex pre-engagement and post-engagement questions.

Capital advisers captured qualitative and quantitative data to produce a tailored report for the 50 participating academy trusts about their estate management practices. Again, all responses and assessments were scored as 100% = "Yes", 50% = "In-part" or 0% = "No" if the trust was adhering to estate management best practice, partially adhering to estate management best practice, or not adhering to estate management best practice, respectively.

The mean of their scored pre-engagement responses was used to identify the current (perceived²) capability and practice of the participating academy trusts, while the mean of their scored post-engagement responses was used to give an indication of the potential improvement capability and practice from participating in CAP part 1.

Scope of the CAP programmes:

- 1) The CAP pilot was launched to 20 MATs who were randomly selected from those who receive SCA, 12 of which were relatively recent SCA recipients and a control group of 8 academy trusts who had been receiving SCA for longer. Consideration was taken to ensure a geographical spread, and that academy trusts of different sizes were all represented. Capital advisers completed return visits to all 20 MATs

² The pre-engagement questionnaire scores were higher than advisers found current estate management capability, which is reflected in the number of recommendations made.

to review and assess any developments that had been made against the original pilot report recommendations.

- 2) CAP part 1 was launched to both MATs and SATs who have high condition need. 50 academy trusts were randomly selected, and consideration was taken to ensure that a geographical spread, a range of trust sizes and trust maturity were all represented.
- 3) Academy trusts that participated in both programmes were characterised using the categories as demonstrated in table 1.

Table 1: Trust sizes

Trust size categories	Number of trusts in the pilot programme	Number of trusts in part 1 programme
Single Academy (1 school in the estate)	0	9
Trusts with 2 – 5 academies	5	16
Trusts with 6 - 20 academies	12	18
Trusts with 21+ academies	3	7

- 4) For the pilot revisits, capital advisers were able to measure some longer-term outcomes by reviewing trust progress in comparison to the original pilot recommendation reports. Capital advisers were then able to offer further support and recommendations based on the progress made since the pilot and in light of current challenges.
- 5) Longer-term outcomes could not be measured within the part 1 timeframe, but post-engagement questions were designed to measure the potential long-term outcome, based on whether academy trusts planned to implement the recommendations or not.

Findings

Key insights from the CAP pilot revisits

During the pilot, most academy trusts were found to only be partially implementing good practice in estate management. Findings from the pre-engagement questionnaires compared to the capital advisers' assessment also indicated that there was a contrast between the trust's perception of their GEMS compliance in comparison to the advisers' assessment. The pilot revisits found that academy trusts have collectively completed 148 out of 385 recommendations, which has enabled a 25-percentage point improvement in aligning with good estate management practices.

In particular, the revisits found that notable improvements were made across the following areas:

- **Uptake of GEMS guidance** – we know from the pilot that academy trusts who use GEMs guidance were in receipt of statistically³ fewer recommendations.
- **Condition surveys** – recommendations to commission condition surveys across their estate were made to over three-quarters of academy trusts in the pilot and at the revisit just under half of MATs remain non-compliant.
- **Asset management plans** – most academy trusts at the pilot stage did not have asset management plans, but by the revisit, over a quarter of these academy trusts had a plan in place.
- **Effective project planning** - this had the highest average number of recommendations at both pilot and revisit stages. However, on average, this had the largest number of improvements since the pilot.
- **Estate maintenance** – since the pilot, academy trusts have made improvements across the maintenance and operation of their estate, particularly targeting better health and safety and compliance within their buildings.

During the revisits, advisers found that some progress had been made across all the recommendations, but most academy trusts (18) had yet to undertake suitability and sufficiency surveys. Despite progress, over half of the 20 academy trusts had outstanding recommendations to develop an asset register and asset management plans, improve estate strategy documentation and communication of their estate strategy and, due to current market conditions, energy and utilities improvement plans remained a recommendation for 11 academy trusts. A more detailed breakdown of the recommendations can be found in Annex advisers' assessment results.

³ As confirmed by a Mann-Whitney U Test with 95% significance level.

The revisit pre-engagement questionnaire scores, whilst still higher than the adviser assessed scores, were much closer. This is an encouraging finding, evidencing the value of the programme in helping academy trusts understand what good practice looks like, how to implement it and what the potential positive impact is on academy trusts. This was expected, given that of the 20 academy trusts who were revisited, 16 (80%) responded that CAP recommendations improved their understanding of condition and compliance investment priorities in their estate, and 18 (90%) suggested that the recommendations have supported better management of health and safety, compliance, and maintenance across their estate.

The savings made because of CAP revisits recommendations have been well-received by participating academy trusts and have supported areas such as condition, compliance, and energy improvements. Of the 20 pilot academy trusts, 14 (70%) indicated that CAP revisits recommendations have helped them obtain better value for money across estate operations and 13 (65%) indicated that this has helped them reduce energy usage and costs because of the programme.

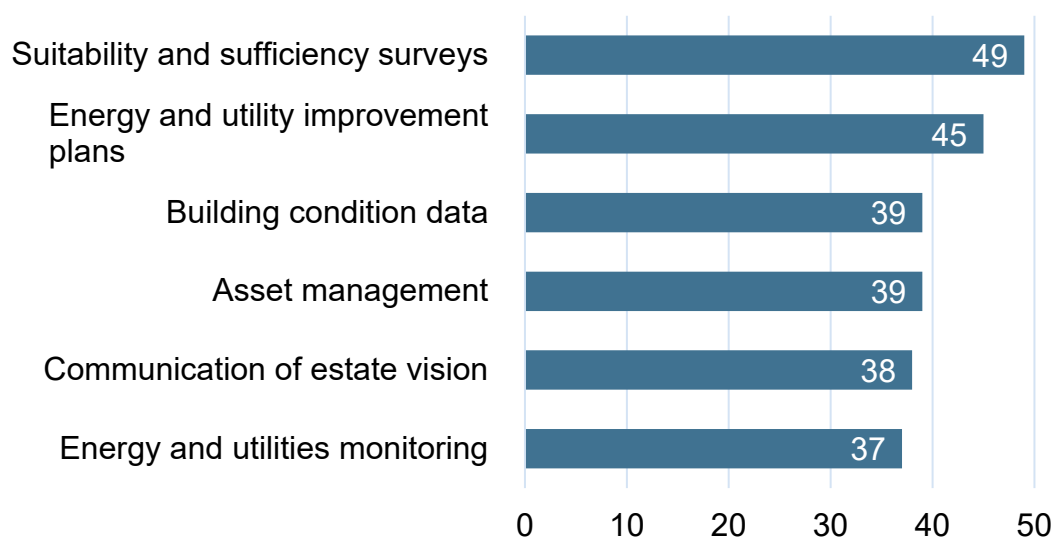
Key insights from CAP part 1

As with the pilot, part 1 found that academy trusts had a high level of GEMs awareness, however it's use was low in comparison. On average, 43 (85%) academy trusts out of the participating 50 academy trusts indicated they were aware of the GEMS guidance, however 22 (44%) academy trusts stated they were actively using GEMS guidance or had similar processes in place. Many academy trusts within the programme were not aware of the support and benefits that GEMS can provide to improve their estate operations.

However, the 22 academy trusts that were using GEMs (or similar), in their own estate management had on average 7 fewer recommendations per trust than the remaining 28 academy trusts, who were found to either not or only partially be using GEMs in their practice, and this is statistically significant. Where GEMS tools, guidance and checklists have been used by academy trusts, more effective estate management practices were being undertaken as found in the pilot and the revisit data.

Across the Capital Advisers Programme, the 5 most common recommendations that have been provided across all 50 academy trusts are demonstrated in Figure 1.

Figure 1: Capital advisers' most common recommendations in CAP part 1



The number and type of recommendations made are consistent with those found during the CAP pilot. Almost all academy trusts stated that they were unaware of the need for suitability and sufficiency surveys or placed them as a low priority in their action plan of improvements. The high number of energy and utility improvement plan recommendations indicates that academy trusts will need to prioritise setting out clear decarbonisation and energy reduction strategies. Academy trusts within the programme confirmed this was a challenge because of limited support, resources, and expertise. Almost 80% of academy trusts had insufficient building condition data and, given the two recommendations are correlated, it also negatively impacts trusts' ability to develop an effective asset management plan, due to the lack of accurate and up to date data that sets out key priorities across the estate.

In the post-engagement survey, each trust was asked to feedback how many recommendations they were willing to implement. Based on their responses, a projection was made to showcase the level of improvement that academy trusts planned to achieve across their estate management practices because of the recommendations.

Pre-engagement, on average academy trusts felt they were operating their estate management in line with good practice in 70% of areas. As with the pre-engagement scores from the pilot, this was much higher than the 843 recommendations made by the advisers, which suggests it is closer to 45%. Based on feedback from all academy trusts, they collectively plan on implementing most of the recommendations between them to help improve their estate management practices, which would increase practices closer towards full compliance.

Most academy trusts (74%) that participated in CAP part 1 estimated that by implementing their recommendations it would help them to obtain better value for money across the delivery of trust projects. 40 academy trusts stated that the recommendations

would help them to reduce their energy usage across their estate and save money, 10 of which provided estimates of savings which on average were around 10% (amounting to over £500,000 savings across the 10 academy trusts).

Medium-sized academy trusts cited larger shares of expected savings, and this aligns with the pilot and revisits programme where medium-sized academy trusts also cited larger expected % savings due to CAP. Projected savings of 10% through improved project delivery (worth approx. £60k) was provided by one trust with another predicting they could now save around 3% (£16k) per year in the operation and maintenance of their estate. In all, a cumulative projection of over £600,000 in annual savings emerged across energy, project delivery and operation and maintenance of the estate based on the feedback from the 12 academy trusts who were able to supply estimates.

Conclusions

CAP pilot revisits

The findings from the pilot revisits suggest that a wider roll out of the programme would add significant benefit to academy trusts in their estate management practices. The revisits data shows that academy trusts are following up on their intended actions, with many recommendations already being put into place, and that estate management compliance and capability is improving as a result of the programme.

Due to the pilot's small sample size, which included 20 MATs, findings are limited, however evidence suggests that CAP enabled MATs to better manage their estate, reducing the risks associated with poor school condition and safety issues which would in turn help to prevent harm to building users, school closures, and significant additional costs to schools.

Following from the completion of the pilot, the revisit phase confirmed that the revisit process should be undertaken with all academy trusts after a minimum of 12 months to enable progress to be reviewed based on completed recommendations. This would also offer an opportunity to identify any challenges that the academy trusts are facing with implementing improvements and therefore provide new or adjusted recommendations to help ensure academy trusts reach their potential in aligning with good practice estate management.

CAP part 1

CAP part 1 has built on the pilot data and provided further insights into the challenges, areas of development, and benefits the recommendations can bring participating academy trusts in improving their estate management practices.

The programme received positive feedback from almost all academy trusts, who have collectively outlined that the recommendations will support them in improving their estate management. The programme has also collected invaluable trust feedback on where more support, guidance and advice can be provided. It also highlighted barriers that are impacting on trust estate management.

From the 50 participating academy trusts, 40 trusts expected to be able to reduce their energy usage and save money as a result of CAP recommendations. While only a small sample (12 trusts) provided estimates of financial savings, these 12 between them estimated savings amounting to £600,000.

From the pilot and part 1, CAP has engaged with 70 academy trusts in total. The evidence gathered suggests that participating in CAP has improved academy trusts' understanding and awareness of GEMs. This is highlighted by the discrepancy between

academy trusts' perceived level of compliance and that found by estate experts at the start of each programme. This discrepancy has been further evidenced by the advisers' recommendations on how academy trusts can better manage their estates and trust estimates on cost savings, based on these recommendations.

These findings indicate that there is benefit in conducting a wider roll out of the programme to enhance estate management practices for more academy trusts. Any future delivery of CAP will continue to grow our numbers and allow us to focus on collecting more data and evidence to quantify the benefits of good estate management, developing capability and practice, and continuing to improve outcomes for academy trusts.

Next steps

The next phase of CAP will expand the programme in this academic year (2023/2024) by deploying capital advisers to a further 70 academy trusts, selected using the same criteria as part 1 based on condition need, geography, challenges, and school characteristics.

The expanded programme will support the ongoing development of the department's learning and enable continuous improvements to CAP to increase its reach and impact in future phases. Based on the pilot revisits' success, follow up visits will be arranged for the 50 academy trusts that participated in part 1 to monitor progress against recommendations and provide further support and guidance. Considering minimum timelines for revisits, this activity will need to be commissioned in CAP part 3.

The Capital Advisers Programme will uphold a strong level of trust and engagement with participating trusts, emphasising the coaching and supportive aspects of CAP. The programme will continue to improve the CAP offer to trusts based on their feedback.

Annex

Pre-engagement and post-engagement questions

Participating academy trusts in both the pilot revisits and part 1 were asked 40 questions prior to engagement with their assigned adviser. At the end of each programme, they were asked 40 corresponding questions to gauge the impact of the advisers' visits. These are the 40 paired questions.

Section 1 – Strategic estate	
Section 1.1 – Estate vision	
Pre-engagement questionnaire	Post-engagement questionnaire
Is your trust aware of the Good Estate Management for Schools (GEMS) organisational self-assessment tool?	Following on from the capital adviser meeting discussions, are the trust now aware of the Good Estate Management for Schools (GEMS) organisation self-assessment tool?
Does your trust use the Good Estate Management for Schools (GEMS) organisational self-assessment tool?	Following on from the capital adviser meeting discussions, are the trust seeking to use the Good Estate Management for Schools (GEMS) organisation self-assessment tool?
Does your trust have an estate vision?	Following on from the capital adviser meeting discussions, are the trust seeking to finalise and implement an estate vision as per recommendations?
Has your trust estate vision been developed, reviewed, and approved by your board/governing body?	Following on from the capital adviser meeting discussions, will the trust be seeking to ensure that the estate vision is developed, reviewed, and approved by your board/governing body?
Does your trust regularly review and update your estate vision alongside your educational vision?	Following on from the capital adviser meeting discussions, will the trust be seeking to update the estate vision alongside the education vision?
Section 1.2 - Estate strategy	
Pre-engagement	Post-engagement

Does your trust have an estate strategy that aligns with your estate vision?	Following on from the capital adviser meeting discussions, will the trust be seeking to finalise and implement an estate strategy that aligns with the trust education vision?
Has your trust estate strategy been reviewed and approved by your board/governing body?	Following on from the capital adviser meeting discussions, will the trust be seeking to ensure that the estate strategy is developed, reviewed approved by your board/governing body?
Is your trust estate strategy reviewed and updated on an annual basis?	Following on from the capital adviser meeting discussions, will the trust be seeking to review and update the estate strategy on an annual basis?
Section 1.3 - Asset management plan	
Pre-engagement	Post-engagement
Does your trust have an asset management plan?	Following on from the capital adviser meeting discussions, will the trust be seeking to update and/ or implement as asset management plan as per recommendations?
Has the trust asset management plan been reviewed and approved by your board/governing body?	Following on from the capital adviser meeting discussions, will the trust be seeking ensure that the asset management plan is developed, reviewed approved by your board/governing body?
Is your trust asset management plan reviewed and updated alongside your estate strategy on an annual basis?	Following on from the capital adviser meeting discussions, will the trust be seeking to review and update the asset management plan alongside the estate strategy on an annual basis?

Does your trust have a prioritised estate maintenance and investment plan that covers all of your school estate by category and priority?	Following on from the capital adviser meeting discussions, will the trust be seeking to update and implement a prioritised estate and maintenance investment plan covering the entire estate?
Section 1.4 - Planning and organising estate resources	
Pre-engagement	Post-engagement
Is your trust aware of the good estate governance guide?	Following on from the capital adviser meeting discussions, is the trust now fully aware of the good estate governance guide?
Does your trust use the good estate governance guide or have similar processes in place to ensure that key areas are complied with?	Following on from the capital adviser meeting discussions, will the trust be seeking to use the good estate governance guide or adopt similar processes to ensure key areas are complied with?
Does your trust have a clear operational, management and senior leadership structure which clearly outlines the roles, responsibilities, and accountabilities across your organisation?	Following on from the capital adviser meeting discussions, does the trust plan to update and implement a clear operational, management and senior leadership structure which clearly outlines the roles, responsibilities, and accountabilities across your organisation?
Does your trust have a 3 to 5-year budget plan for your estate?	Following on from the capital adviser meeting discussions, will the trust be seeking to update and implement a 3 to 5-year budget plan for your estate?
Has your trust implemented clear governance procedures that set out all guidelines that must be adhered to when undertaking any building or maintenance related works?	Following on from the capital adviser meeting discussions, will the trust be seeking to update and implement a set of clear governance procedures that set out all guidelines that must be adhered to when undertaking any building or maintenance related works?

Section 2 - Understanding and managing your land buildings	
Pre-engagement	Post-engagement
Does your trust have a centralised database system where all property, compliance and estate data are accessible to all schools and the wider estate teams?	Following on from the capital adviser meeting discussions, will the trust be seeking to update and implement a centralised database system where all property, compliance and estate data is accessible to all schools and the wider estate teams?
Does your trust have all records of legal interests regarding the estate land and buildings including: <ul style="list-style-type: none"> • the nature of legal ownership, whether freehold or leasehold • other controlling interests such as charitable restrictions • any restrictions that impact on the use of land and buildings • any third-party ownership, etc. 	Following on from the capital adviser meeting discussions, will the trust be seeking to obtain, update and store all records of legal interests, building, compliance, and other information relating to the estate and share this as applicable?
Does your trust have an up to date (within previous 5 years) condition survey for each school?	Following on from the capital adviser meeting discussions, will the trust be seeking to obtain, update and implement up to date building and M&E condition surveys across the estate?
Does your trust have an up to date suitability and sufficiency assessment with a list of any recommendations and requirements for each school?	Following on from the capital adviser meeting discussions, will the trust be seeking to obtain, update and implement up to date suitability and sufficiency assessments across the estate?
Section 3 - Performance management and sustainability	
Pre-engagement	Post-engagement

Does your trust undertake any energy and utilities monitoring across your estate?	Following on from the capital adviser revisit, will your trust be implementing new or existing procedures for monitoring and benchmarking energy and utilities usage across the estate?
Has your trust developed any energy and utilities improvement plans, such as planned decarbonisation projects and energy saving initiatives?	Following on from the capital adviser revisit, will your trust be setting out and implementing any new or existing capital project works or energy saving approaches across the estate?
Section 4 - Managing estate projects	
Section 4.1 - Identifying, planning and prioritising projects	
Pre-engagement	Post-engagement
Is your trust aware of the Good Estates Management for Schools estate projects checklist?	Following on from the capital adviser meeting discussions, is the trust now fully aware of the Good Estates Management for Schools estate projects checklist?
Does your trust use the Good Estates Management for Schools estate project checklist or have similar processes in place to ensure that key areas are complied with?	Following on from the capital adviser meeting discussions, does the trust intend on using the Good Estates Management for Schools estate projects checklist?
Does your trust allocate building projects funding to schools based on your existing estate strategy, asset management plan and condition investment programme needs?	Following on from the capital adviser meeting discussions, will the trust be seeking to allocate all building project funding to schools based on your existing estate strategy, asset management plan and condition investment programme needs?
Does your trust centrally manage all building projects across your schools?	Following on from the capital adviser meeting discussions, will the trust be seeking to centrally manage all building projects across your schools?

Section 4.2 - Effective project planning	
Pre-engagement	Post-engagement
When undertaking building projects, does your trust appoint a professional adviser to support with the development of feasibility, design, and specifications?	Following on from the capital adviser meeting discussions, does the trust intend on ensuring that a professional adviser and/ or competent and experienced person is appointed to support with the development of feasibility, design, and specifications?
When undertaking building projects, does your trust employ the services of a specialist adviser/ consultant to support with Construction Design and Management Regulations 2015?	Following on from the capital adviser meeting discussions, does the trust intend on ensuring that a professional adviser and/ or competent and experienced person is appointed to support with Construction Design and Management Regulations 2015?
Section 4.3 - Tendering and procurement of capital project works	
Pre-engagement	Post-engagement
When undertaking building projects, does your trust undertake any pre-qualification or other assessments to help ensure that only appropriately qualified, competent, and experienced contractors are being invited to tender and deliver works?	Following on from the capital adviser meeting discussions, does the trust intend on ensuring that a pre-qualification process is implemented to help ensure that only appropriately qualified, competent, and experienced contractors are being invited to tender and deliver works?
When undertaking building projects, does your trust implement measures to ensure value for money is being achieved?	Following on from the capital adviser meeting discussions, will the trust seek to ensure that a robust method of achieving value for money is being implemented across the estate?

<p>Has your trust experienced any challenges in the ability to deliver capital building projects due to rising construction and material costs, labour shortages and contractor availability?</p> <p>If Yes/ In-part, what would best describe the implications that construction challenges have had on your trust?</p>	<p>Overall, do you believe that the capital adviser recommendations will enable your trust to:</p> <ul style="list-style-type: none"> • Obtain better value for money across the delivery of trust projects? • Gain a better understanding of key condition, compliance, and investment priorities across your estate?
<p>Section 4.4 - Project delivery</p>	
<p>Pre-engagement</p>	<p>Post-engagement</p>
<p>When undertaking building projects, does your trust implement cost control and contract management measures (such as a dedicated contract administrator/ other competent person who will monitor and manage the project costs with the contractor) to help ensure the project is delivered on time and on budget?</p>	<p>Following on from the capital adviser meeting discussions, does the trust intend on ensuring cost control and contract management measures (such as appointing a dedicated contract administrator etc. are now implemented to help ensure all projects are delivered on time and on budget?</p>
<p>When undertaking building projects, does your trust implement quality control measures (such as a dedicated competent person and process to monitor the quality of the works) to help ensure the scheme is delivered to the correct standards and in line with specified requirements and expectations?</p>	<p>Following on from the capital adviser meeting discussions, will the trust seek to implement quality control measures (such as a dedicated competent person to monitor the quality of the works) across all of their projects that will help ensure the correct standards and in line with specified requirements and expectations?</p>
<p>Section 4.5 - Project handover and review</p>	
<p>Pre-engagement</p>	<p>Post-engagement</p>

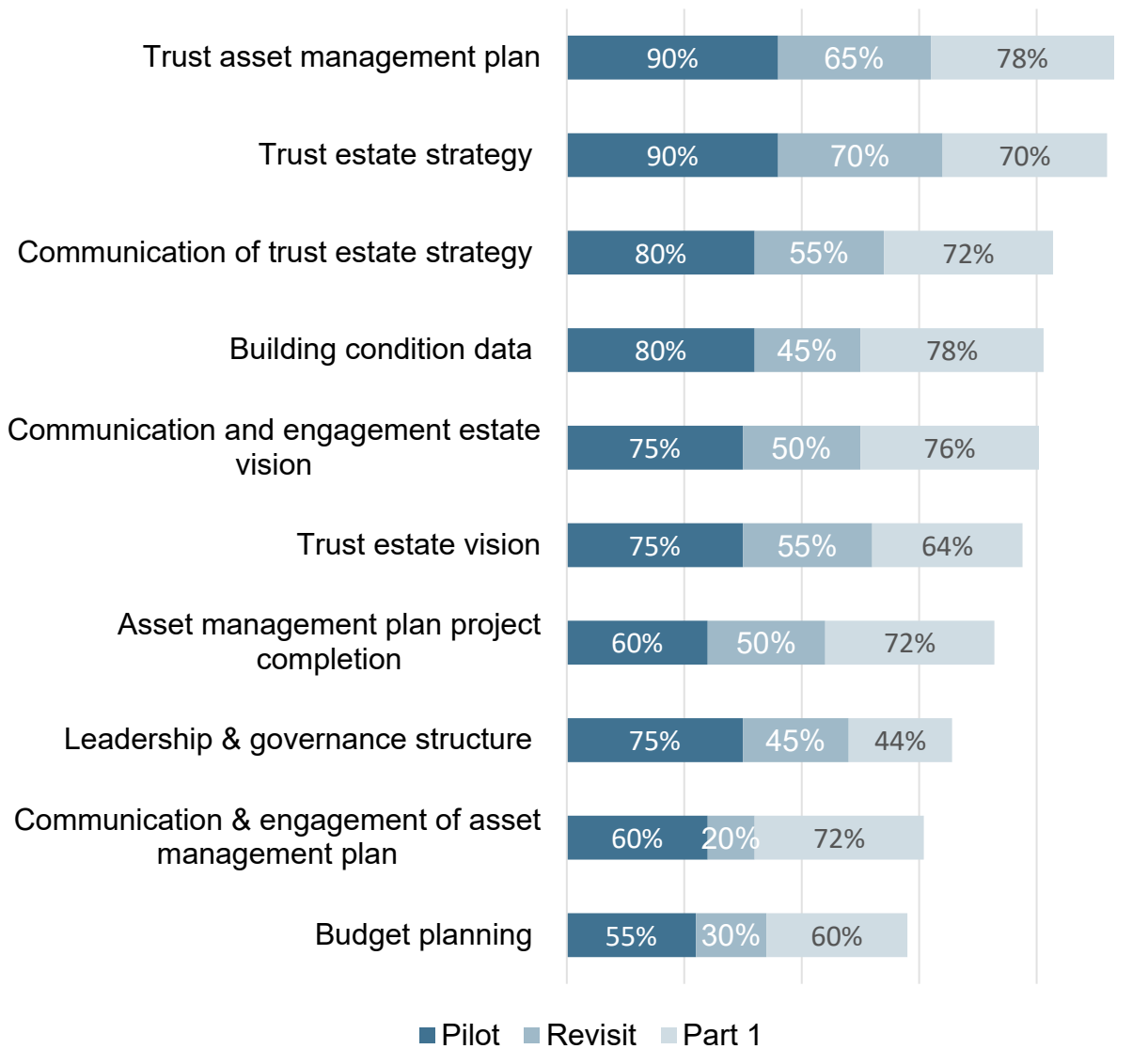
When undertaking building projects, do you carry out a pre-planned handover which involves the project team, estate/ school team, end users (such as teachers who will be working within the space for example) and any facilities management or maintenance providers that will be responsible for operating and managing the area?	Following on from the capital adviser meeting discussion, will the trust be seeking to ensure that a pre-planned handovers are undertaken on each project that involve the project team, estate/ school staff and any facilities management or maintenance providers?
Following on from completion of your building projects, do you undertake any assessments or reviews to capture how well the project went, what did not go well and what changes you would implement in future projects to improve?	Following on from the capital adviser meeting discussion, does the trust intend on implementing assessments and reviews for each project capture how well the project went, what did not go well and what changes you would implement in future projects to improve?
Section 5 - Maintaining your estate	
Pre-engagement	Post-engagement
Following on from completion of your building projects do you review and update your fire safety plan and or other statutory testing/inspection schedules?	Following on from the capital adviser meeting discussion, does the trust intend on ensuring that all fire safety plans and or other statutory testing/inspection schedules are reviewed and updated following on from the completion of all building projects?
Does your trust have a detailed health and safety, facilities management, planned and reactive maintenance and statutory compliance inspection programme in place for each school?	Following on from the capital adviser meeting discussion, does the trust intend on updating and implementing a detailed health and safety, facilities management, planned and reactive maintenance and statutory compliance inspection programme in place for each school?

<p>Does your trust have access to, and implement regular reviews of health and safety, facilities management, planned and reactive maintenance and statutory compliance inspection services for each school?</p>	<p>Following on from the capital adviser meeting discussion, does the trust intend on ensuring that regular reviews of health and safety, facilities management, planned and reactive maintenance and statutory compliance inspection services are undertaken for each school?</p>
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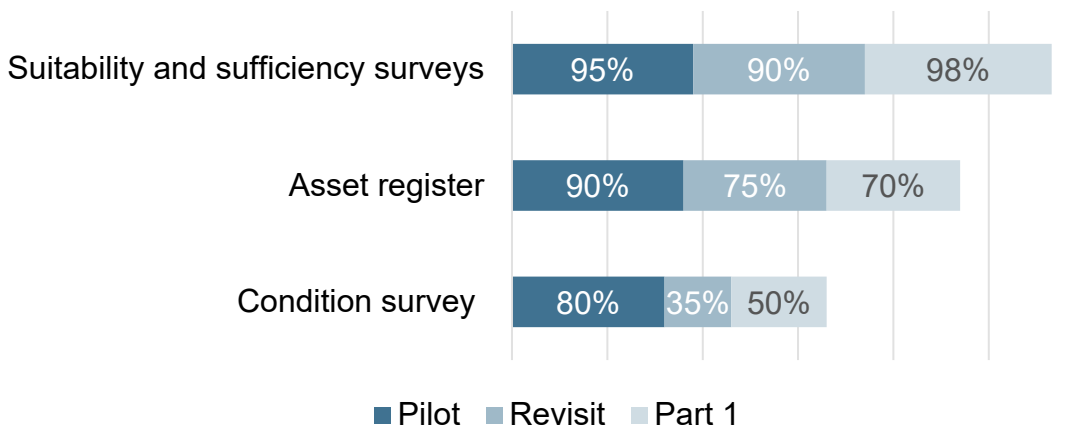
Advisers' assessment results

The practice of participating academy trusts was assessed over 30 areas of estate management. Based on these findings, capital advisers issued recommendations to each trust at pilot, pilot revisit and part 1 stages, categorised under the 5 key sections. The following figures show the percentage of academy trusts that received recommendations from capital advisers in the pilot, pilot revisits and part 1 for each of the 5 key sections.

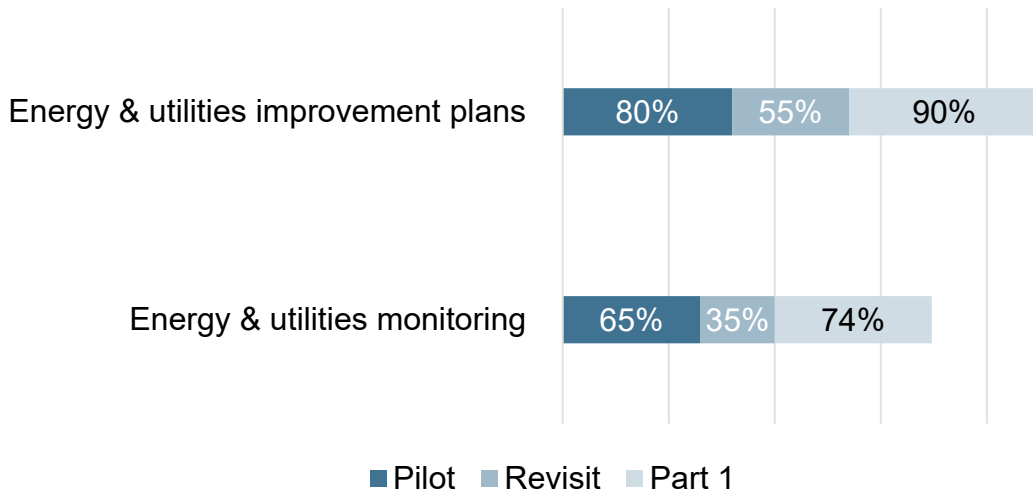
Section 1 - Strategic estates management



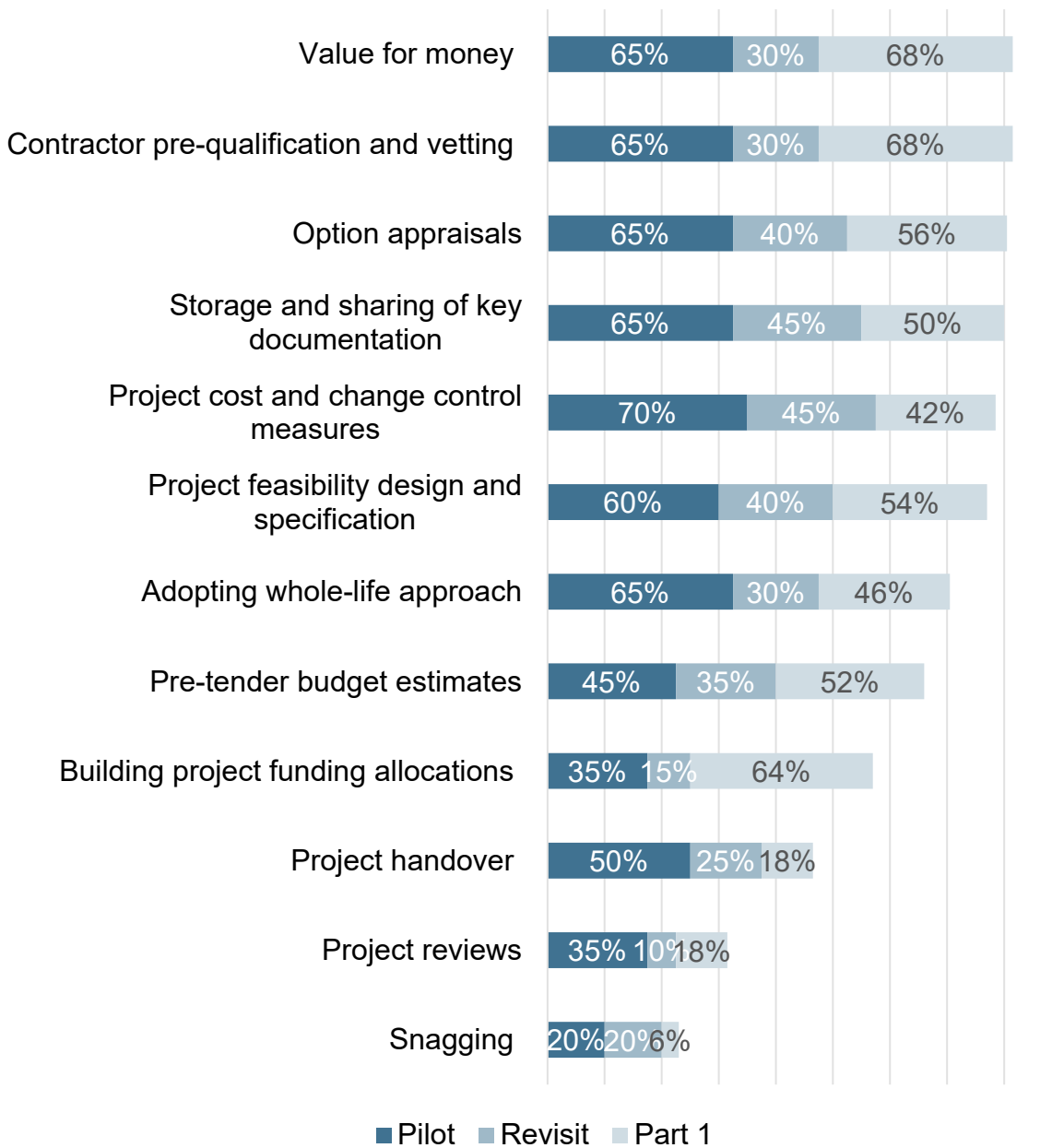
Section 2 - Understanding and managing your land and buildings



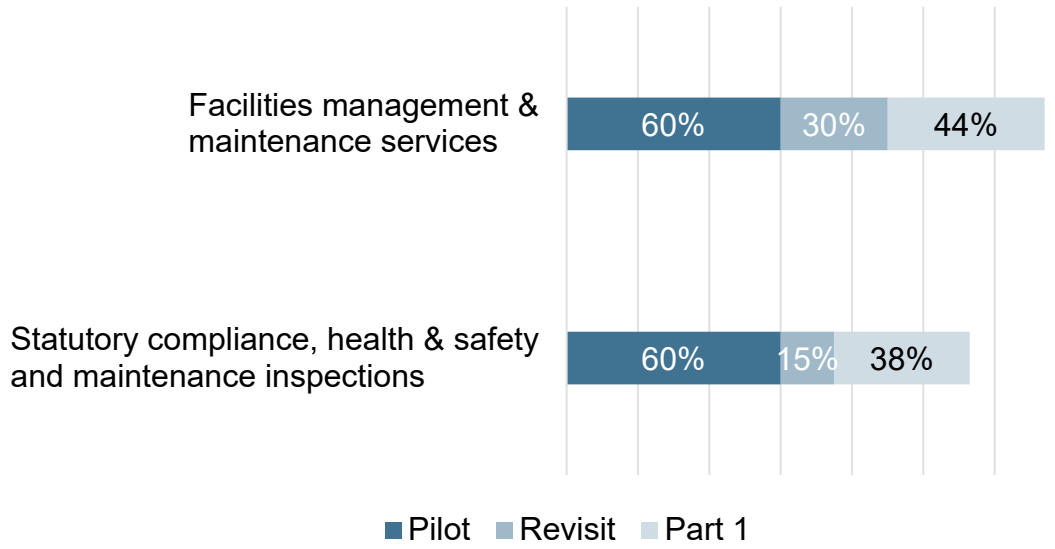
Section 3 - Performance management and sustainability



Section 4 - Managing estates projects



Section 5 - Maintaining your estate





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