MOSAIC SCHOOLS LEARNING TRUST

ESTATES STRATEGY

All schools in Mosaic Schools Learning Trust are committed to safeguarding and promoting the welfare of children and young people and expect all staff and volunteers to share this commitment.

Staff Responsible:	Head of Estates
Approved By:	Board of Trustees/F&R
Date of Review:	July 2026
Date of Next Review:	July 2027

Version Control

Date	Change
May 2025	New Policy
Jun 2026	New Section 3.1 – Evidence Base and Strategic Decision Making 9 – Planned Maintenance Programme 10.3 - Key Performance Indicators (KPIs) Updates in line with DfE guidance

1. Mosaic Schools Learning Trust's Estates Vision

To develop, maintain and strategically invest in an estate that supports the Trust's vision of achieving excellence for every child, every day. Through proactive asset management, evidence-based investment and sustainable estate planning, the Trust will ensure that its estate remains safe, compliant, financially sustainable and capable of meeting future educational needs.

2. Strategic Objectives

Maintain and improve facilities to create outstanding spaces which support educational, extra-curricular and community needs whilst retaining the uniqueness and individuality of our schools.

Adopt a proactive lifecycle approach to asset management that prioritises renewal before replacement wherever practicable.

Ensure that estate planning supports the delivery of SEND provision, early years education and wider community use of Trust facilities.

3. Commitment

Mosaic Schools Learning Trust is committed to ensuring that its physical estate:

- provides a safe, secure, stimulating learning environment
- is fit for current and future needs
- provides high quality, inclusive learning environments that support pedagogy and meet the needs of all learners.
- supports the Trust's educational aims and objectives
- complies with statutory requirements,
- Is financially efficient and provides value for money
- reduces environmental impact to support sustainability goals
- provides a positive experience for all users of our facilities
- operates in accordance with legal obligations, lease holder arrangements and other statutory guidelines

3.1 Evidence Base and Strategic Decision Making

The Trust adopts an evidence-based approach to estate management. Strategic decisions are informed by a range of supporting documents and data sources including:

- Trust Strategic Plan
- School Development Plans
- Asset Management Plans
- Independent Condition Surveys
- Capital Programme Matrix
- WorkNest Compliance Data
- Environmental Sustainability
- Action Plan

Together these documents provide the evidence base used to prioritise investment and ensure that resources are directed towards areas of greatest educational, operational and strategic need.

4. **Our estates strategy** is a 5-year plan which will assist to:

- identify what is required from our estate and its facilities
- consider how we can achieve our estates needs to meet our educational goals
- identify any potential challenges and barriers
- co-ordinate estates activities to meet the estates vision and best possible outcomes for pupils
- support schools with centralised functions for the management of health and safety, capital funding projects, procurement, and compliance

5. Scope

This strategy applies to all building and outdoor spaces across the Trust's 10 primary schools ensuring alignment with the DfE's Good Estates Management for Schools (GEMS).

6. Current Estate Overview

The estate consists of 10 primary schools located in the London Borough of Bromley and Kent.

The estate features a blend of modern and traditional facilities, offering a variety of grounds and outbuildings. It includes dedicated spaces such as nursery facilities, alternative provision areas, and specialised areas designed to support children with additional needs.

7. Condition of the Estate

Condition surveys of all sites was undertaken by independent education estate consultants to identify the condition of buildings, infrastructure and outdoor spaces.

Condition survey information is reviewed annually and forms the basis of each school's Asset Management Plan. These plans identify lifecycle replacement requirements, compliance risks and capital investment priorities, enabling the Trust to move from reactive maintenance towards planned asset renewal.

8. Asset Management Plans

The asset management plan identifies works based on the current (2025) condition of buildings. The plan identifies the maintenance work which will be required over the following 1-5 years to maintain functional operability, statutory compliance and suitability.

The main priorities for each schools are identified based on legislative considerations, suitability, risk assessment and the resources available. This feeds into a detailed 1-3 year planned maintenance programme for every school.

The Trust adopts a renewal-before-rebuild approach wherever appropriate. Asset Management Plans are used to identify opportunities to extend the life of existing assets through planned investment and refurbishment before replacement is considered.

9. Planned Maintenance Programme

The schools operate a proactive maintenance and lifecycle management approach informed by condition surveys, Asset Management Plans and the Capital Programme Matrix. This approach supports the Trust's commitment to renewal before replacement wherever practicable, reducing the risk of asset failure, improving value for money and ensuring investment is directed towards areas of greatest need.

The Trust maintains:

- A rolling 1-year planned maintenance programme;
- A 3-year capital planning programme; and
- A 5-year strategic investment programme informed by Asset Management Plans and estate condition data.

The schools have a rolling 1-year planned maintenance programme informed by condition surveys and Asset Management Plans which:

- Ensure regular maintenance of essential systems (HVAC, plumbing, roofing).
- Minimise disruption to school operations by scheduling works during periods of school closure and off-peak times.
- Undertake preventative maintenance strategies to extend asset lifespan.
- Optimise the skills and expertise of the Trust's premises management teams.

10. Risk Management and Compliance

The Trust is committed to managing its estate in full compliance with health, safety, and environmental regulations. This commitment is supported through regular risk assessments, audits, and the engagement of a Health and Safety consultant, alongside dedicated compliance monitoring software. Our Estates Strategy reflects our risk appetite and our commitment to providing a safe, legally compliant, sustainable, and operational learning environment for all students and staff. The Trust's risk appetite informs estate planning, capital investment decisions and resource allocation.

10.1 Key Risks, Mitigations, and Strategic Priorities

Priorities are structured into categories based on risk appetite and impact on core operations, as detailed below:

Priority Level	Strategic Focus	Details
1. Very High	Health and Safety	Ensuring a safe environment for all students, staff, and visitors. Full adherence to all health and safety regulations at all times.
2. Very High	Legislative Compliance	Compliance with all legal and regulatory obligations (fire safety, accessibility, safeguarding, environmental standards), beyond health and safety matters.
3. Very High	Continuity of Education (Keeping Schools Open)	Ensuring minimal disruption to children's learning. Estate decisions must prioritise operational continuity, rapid recovery from incidents, and proactive risk management.

4. High	Value for Money	Delivering cost-effective solutions, including investments in energy efficiency, smart building practices, and financially sustainable estates management.
5. High	Asset Protection	Long-term protection of assets through planned preventive maintenance, timely reactive repairs, and life-cycle asset management to prevent unplanned closures.
6. Medium	Sustainability and Green Practices	Integration of sustainability initiatives where practical and economically feasible, incorporated into maintenance, upgrades, and new developments wherever possible.

10.2 Estates Risk Appetite Statement

Risk Area	**Risk Appetite**	**Notes**
Health and Safety	**None**	Full compliance and immediate mitigation expected. No tolerance for compromise.
Legal/Regulatory Compliance	**None**	Full compliance with laws and regulations, proactively monitored and managed.
School Operational Continuity	**Very Low**	Very low tolerance for disruption. High focus on resilience and emergency preparedness.
Financial Efficiency	**Moderate**	Willingness to invest where strong value is demonstrated, balanced against operational needs.
Asset Degradation Risk	**Low**	Tolerate minor degradation only if no immediate health, safety, or operational risk. Proactive maintenance preferred.
Sustainability	**Moderate to High**	Pursue green practices aggressively when aligned with operational and financial feasibility. Innovation encouraged but must not compromise core priorities.

10.3 Key Performance Indicators (KPIs)

To ensure the effective management of the Trust estate and to support continuous improvement, the Trust will monitor performance against a range of estate management indicators. These measures provide assurance to Trustees that the estate remains safe, compliant, financially sustainable and aligned with the Trust's strategic objectives.

Compliance and Health & Safety;

- Maintain a WorkNest SafetyNest score of 350 or above, remaining within the *Proactive* category.
- Achieve 100% completion of statutory compliance inspections and testing within required timescales.
- Maintain 95% or greater compliance documentation completion within WorkNest.
- Complete 95% of audit actions within agreed timescales.
- Maintain zero overdue high-priority compliance actions.

Estate Condition and Asset Management;

- Ensure 100% of schools maintain an up-to-date Asset Management Plan, reviewed annually.
- Maintain a minimum 70:30 ratio of planned maintenance expenditure to reactive maintenance expenditure.
- Reduce the number of significant reactive maintenance incidents year-on-year through proactive lifecycle planning.
- Review condition survey data annually to inform future capital investment priorities.

Capital Programme Delivery;

- Deliver 90% of capital projects within agreed programme timescales.
- Deliver 95% of capital projects within approved budgets.
- Ensure 100% of School Condition Allocation (SCA) funding is allocated in accordance with the Trust's Capital Programme Matrix and strategic priorities.

Sustainability

- Reduce Trust-wide carbon emissions by 20% by 2028, measured against the established baseline.
- Achieve year-on-year reductions in energy consumption where operationally achievable.
- Continue the implementation of energy efficiency measures, including LED lighting upgrades and improved building controls.
- Incorporate sustainability considerations into 100% of major capital projects.

Governance and Reporting

- Provide Trustees with termly estates performance reports.
- Review and update Asset Management Plans annually.
- Review the Estates Strategy annually to ensure continued alignment with Trust priorities, estate condition and DfE guidance.

This approach ensures safe, efficient, and sustainable estates management aligned with the Trust's goals.

Success will be demonstrated through improved estate condition, sustained compliance performance, reduced reactive maintenance, delivery of capital projects and the continued ability of the estate to support educational outcomes across the Trust.

11. Insurance Arrangements

All schools are members of the DfE Risk Protection Arrangement provides an alternative to commercial insurance. Where additional cover is required for something that is not included in the RPA, the Trust will procure additional insurance in line with its procurement and best value procedures.

12. Financial Planning and Capital Funding

12.1 Revenue Funding

Schools allocate a portion of their annual revenue budget specifically for building maintenance, ensuring that facilities remain safe, functional, and conducive to learning. This budget covers routine repairs, preventative maintenance, and necessary upgrades to infrastructure such as heating, plumbing, and electrical systems. Prioritising essential repairs and maintenance to extend the lifespan of buildings, reduce the risk of costly emergency fixes, and create a comfortable environment. The budget is typically reviewed annually to adjust for any emerging needs or changes in school usage.

12.2 Capital Funding

12.2.1 School Condition Allocation (SCA)

The Trust qualifies for School Condition Allocation (SCA) funding, which is invested strategically across the Trust estate to support safe, compliant, sustainable and effective learning environments. The Trust adopts a proactive approach to capital investment, informed by Asset Management Plans, condition surveys, compliance data, school development priorities and the Capital Programme Matrix.

This approach supports the Department for Education's principles of proactive lifecycle planning, data-led capital allocation and renewal before replacement wherever practicable.
Projects are assessed and prioritised using the Trust's Capital Programme Matrix, which evaluates schemes against the Trust's strategic priorities, including:

- Health and Safety
- Statutory Compliance
- Continuity of Education
- Asset Condition and Lifecycle Risk
- Educational Impact
- Sustainability
- Value for Money

This process ensures that investment decisions are transparent, evidence-based and aligned with both Trust and school improvement priorities. The Capital Programme Matrix is reviewed annually to

ensure investment priorities continue to reflect educational need, estate condition, compliance requirements and emerging strategic risks.

The Trust will maintain:

- A rolling 1-year maintenance programme;
- A 3-year capital planning programme; and
- A 5-year strategic investment programme informed by Asset Management Plans and estate condition data.

Wherever possible, the Trust will seek to extend the life of existing assets through planned renewal and refurbishment before replacement is considered, ensuring the most effective use of available funding.

The Trust will also consider opportunities to secure additional funding, grants and external partnerships to support significant estate improvements and sustainability initiatives.

A reserve fund will be maintained to support emergency works and unforeseen estate risks.
The Trust operates a robust procurement strategy aligned with the Department for Education's Good Estate Management for Schools (GEMS) guidance, ensuring all projects achieve value for money and support long-term estate sustainability.

12.2.2 Devolved Formula Capital (DCA)

Individual schools receive DFC funding annually which is spent on capital projects that support the school's improvement priorities. Projects may include:

- Improvements to buildings or other facilities (including ICT)
- Repairs and refurbishments to existing capital

13. Optimisation of Space and Planning

The Trust is committed to ensuring that its estate is utilised effectively to support educational delivery, operational requirements and long-term strategic objectives.
Accommodation requirements will be reviewed regularly to ensure that facilities continue to meet the needs of pupils, staff and the wider community. This will include consideration of:

- Pupil demographics and capacity;
- SEND and specialist provision;
- Early years provision;
- Curriculum requirements;
- Safeguarding and security;
- Community use opportunities.

As part of the annual Asset Management Plan review process, the Trust will assess current and future accommodation requirements and incorporate findings into capital investment planning. Where appropriate, the Trust will seek to repurpose or enhance existing accommodation before considering new build solutions, supporting its commitment to renewal before replacement.

The Trust will review accommodation needs annually to ensure the estate continues to support evolving educational priorities.

14. Sustainability

The Trust is committed to managing its estate in an environmentally responsible and sustainable manner. Through the implementation of its Environmental Sustainability Action Plan, the Trust aims to reduce energy consumption, carbon emissions and environmental impact across all schools. Sustainability considerations will be incorporated into estate planning, asset management and capital investment decisions to ensure that environmental improvements are delivered alongside operational and educational benefits.

The Trust will seek to:

- Improve energy efficiency through planned maintenance and capital investment;
- Reduce carbon emissions across the estate;
- Improve water efficiency and reduce waste;
- Enhance biodiversity and outdoor learning opportunities;
- Explore renewable energy and low-carbon technologies where appropriate and financially viable.

Asset Management Plans and condition surveys will be used to identify opportunities for sustainable improvements as part of planned lifecycle replacement programmes, supporting the Trust's commitment to proactive estate management and renewal before replacement.
Progress against sustainability objectives will be monitored through the Trust's Environmental Sustainability Action Plan and reported to Trustees as part of the annual review of this strategy.

15. Roles and Responsibilities

The Trust Board is responsible for overseeing the strategic direction of the estate and approving major capital investment. The Board receives regular reports on the performance of the estate, project planning and progress and compliance.

The Trust's Central Business and Finance Team, in consultation with school leaders and facilities management staff will coordinate planning and projects across all schools.

Head Teachers, Head of Estates and school-based site staff are responsible for day-to-day management and maintenance at school level.

Associated Documents

1. Trust Strategic Plan
2. School Development Plans
3. Asset Management Plans
4. Independent Condition Surveys
5. Capital Programme Matrix
6. Environmental Sustainability Action Plan
7. WorkNest Compliance Reports
8. Health and Safety Statement
9. Health and Safety Policies
10. Business Continuity and Critical Incident Plans
11. DfE Good Estate Management - https://www.gov.uk/guidance/good-estate-management-for-schools/strategic-estatemanagement
12. 2026 Schools White Paper; Every child achieving and thriving