



Department
for Education

Capital Advisers Programme

Part 2 evaluation

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Government
Social Research

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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 helps academy trusts to make more efficient spending decisions, improve building safety, and better manage their accountability and statutory responsibilities for their school estate.

Pilot

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 accredited capital advisers, using the [school resource management advisers](#) (SRMA) programme model, could improve how 20 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. They explored the need for tailored advice on strategic estate management and capital spending and whether involvement with CAP resulted in trusts improving their processes.

Pilot revisits & part 1

In September 2022, 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 20 pilot academy trusts were also revisited by a capital adviser to review and assess behaviour changes as well as identify and assess the impact and benefits of the programme. The pilot revisits found that academy trusts had completed 148 out of 385 capital adviser recommendations, which enabled a 25-percentage point improvement in aligning with good estate management practices.

Part 2

In January 2023, CAP part 2 was launched to SATs and MATs with high condition need estates. Learning lessons from the pilot and part 1, part 2 scaled up the number of participating trusts to 64 and sought to collect richer data on the expected impacts of the programme on trusts.

Academy trusts were chosen through a process similar to the method used in the pilot and part 1, with deliberate emphasis on factors such as condition need, trust maturity, trust size and location. This selection approach ensured data was captured across all parts of the high need sector. The increased sample size, combined with the types of academy trusts selected to participate, helped build capability across all sizes of trust, whilst providing a much-needed evidence base on trust capability and practice, continuously strengthening the impact and benefit of the CAP and wider DfE offer.

Throughout this report, text within the blue boxes contain insights on the whole CAP programme to date, including the pilot, pilot revisits and part 1 as well as part 2.

Executive summary findings

On average, trusts that were using GEMS to support their estate management practices received fewer CAP recommendations and were generally adopting more effective estate management principles in comparison to trusts that were not using the guidance.

Trusts are only partially implementing good practice in estates management. With implementation of the recommendations, support and advice provided, alignment with good practice is projected to increase from 65% to 90% overall.

CAP is projected to potentially save part 2 trusts over £8.2m across energy (£2.5m), project delivery (£3.6m), and maintenance costs (£2.1m) over the next two years.

As found in earlier rounds of the programme, trusts consistently ranked their own level of good estate management practices higher than what capital advisers found when visiting them. On average trusts perceived themselves as 8 percentage points higher than capital advisers' findings suggested. The largest variance (17 percentage points) was about understanding and managing land and buildings.

SATs and small MATs received the highest number of recommendations. On average, they received 6 more recommendations (20) compared with large MATs that received 14.

84% of trusts (51 out of 64) stated that they have directly experienced detrimental impacts to their estate management operations due to current economic market conditions, particularly in the construction and maintenance sectors which were higher than the Consumer Price Index (CPI inflation). The most common impact was cost increases, which directly influenced wider issues around estate risks and project delays.

94% of trusts (60 out of 64) stated that CAP recommendations will be beneficial in helping them to more effectively identify and manage their key condition and compliance obligations across their estate.

97% of trusts (62 out of 64) stated that they found the support, advice, and recommendations offered by CAP to be beneficial to their organisation.

The findings from CAP part 2 mostly align with those from the pilot and CAP part 1. Over the course of the programme to date, 134 trusts have provided in-depth insights into estate management capability and practices in the school sector.

Aims and objectives

CAP part 2 continues to evaluate whether, and to what extent, an assessment by capital advisers can help improve how trusts strategically manage their estates and make the best use of their capital funding.

Since the 2021 pilot, each phase of CAP has found evidence of variance in estate management capability and practice in schools. There is inconsistency in access to support in this area, and in capability to make the most strategic and effective decisions on how to best use capital condition funding.

CAP explores the need for bespoke advice and practical steps to implement recommendations based on strategic estate management. The programme aims to support participating academy trusts 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

CAP's impact on trusts was assessed by intended improvements in estate management compliance, measured through pre- and post-engagement questionnaires and data on estimated savings expected from recommendations across energy, project delivery, and the management and operation of estates. The effect of academy trusts already using GEMS compared to those that do not was also considered.

The framework for CAP was adopted in line with previous phases of the programme and the Good Estate Management for Schools (GEMS) guidance, with tailored focus on how trusts manage their estates and budgets. Capital advisers provided practical advice, recommendations, and shared best practices to support trusts, based on GEMS and their broader experience. Capital adviser support and recommendations follow the following 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 estate projects
- Section 5 – Maintaining your estate

Each of the 64 trusts that participated in part 2 were invited to complete a pre-engagement questionnaire querying how they manage their estate. The questions can be found in annex 1. The 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 trust and held discussions on the 5 key sections of the programme. The trusts' pre-engagement questionnaire responses were also tested and reviewed by capital advisers during these meetings and revised scores were determined where required¹.

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 considered trusts' performance across these 5 sections again using the values "Yes", "In-

¹ A set of readjusted technical adviser scores were calculated to assess the 'true' level of estate management capability across the sector

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.

Following the issue of the capital adviser report, which includes an action plan of recommendations to the trust, a post-engagement questionnaire was developed to:

- Assess whether the trust would be taking on board and implementing the recommendations provided
- Gain feedback on how they found the programme
- Obtain estimations from trust representatives on savings, efficiencies, and wider benefits from the programme recommendations.

For accuracy purposes and to help provide a direct comparison between the trust’s pre- and post-engagement position, the post-questionnaire directly referenced back to the pre-engagement questions to help project any like for like improvements, where applicable. The post-engagement questions can be found in annex 1.

Scope

64 SATs and MATs with high condition need were invited to participate in CAP part 2 and were given the opportunity to either accept or decline the offer. CAP is not a bid-based programme so there is no application process. The 64 trusts were selected, ensuring a geographical spread, a range of trust sizes, and varying levels of trust maturity were all represented. The participating trust sizes were categorised as demonstrated in Table 1.

Table 1: Trust sizes

Trust size	Number
Large MAT	8
Medium MAT	32
Small MAT	18
Single Academy Trust (SAT)	6
Total	64

Accreditation

Capital advisers deployed in the pilot hold relevant qualifications or equivalent relevant

experience and have demonstrable experience of working within the school or education sector for at least 2 years, as well as notable estate management experience.

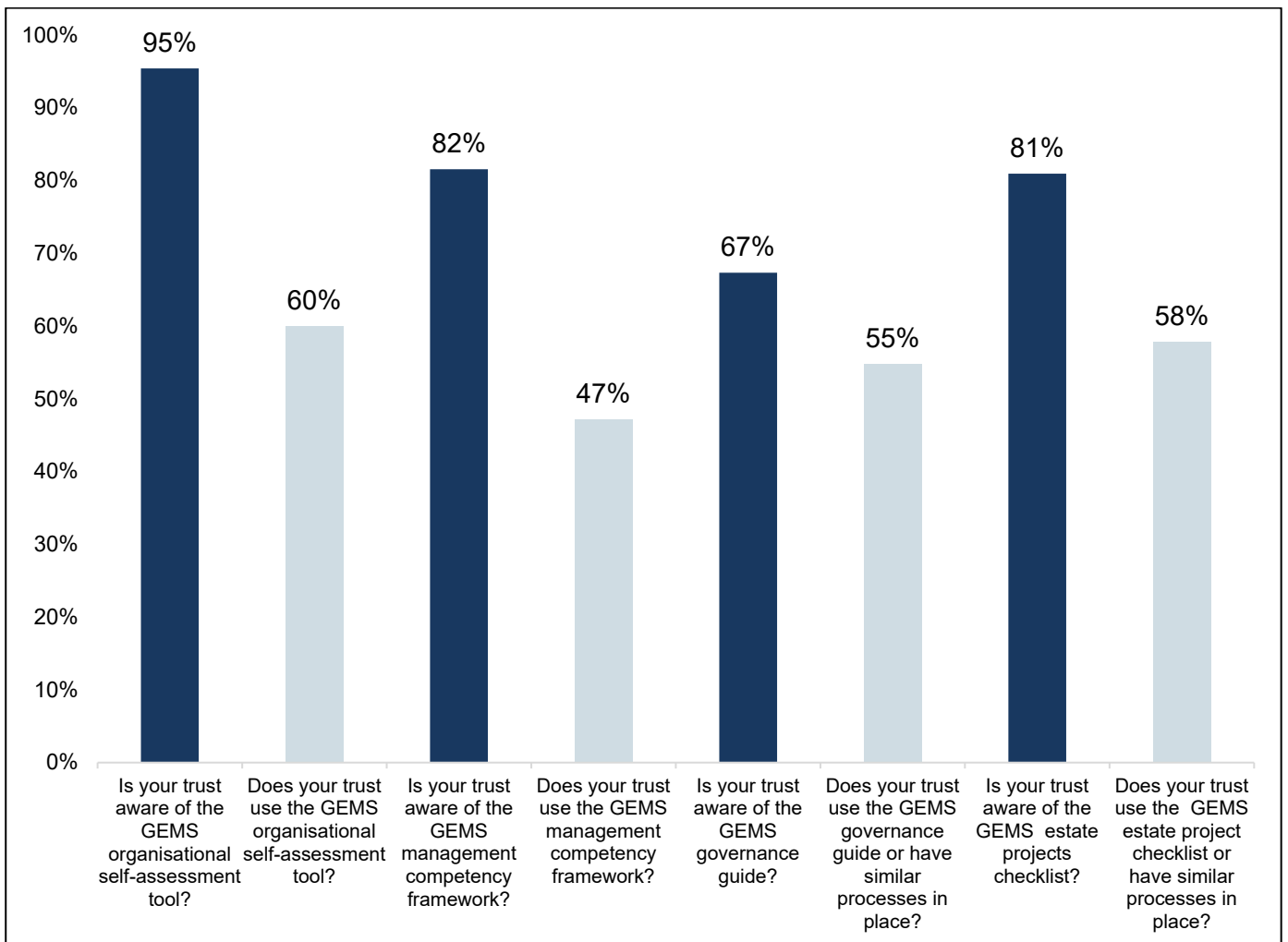
Capital advisers deployed needed to hold one of the following qualifications, or be able to evidence equal relevant experience:

- 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)

Main findings

Similar to the findings from the pilot and part 1, part 2 found that trusts were only partially implementing good practice in estates management. Almost 90% (57) of the trusts in part 2 were aware at some level of the GEMS guide and the majority (84%) either use GEMS or have similar processes in place. However, across all stages of the programme to-date, the number of trusts that fully adopt GEMS remains at around 40%. Similar trends were identified across the other various GEMS tools, guidance and checklists, with the GEMS self-assessment tool being the most known and used. There was also a reasonably high awareness of the [estate management competency framework](#) with encouraging use (or part use) of around 70% since its launch in April 2024.

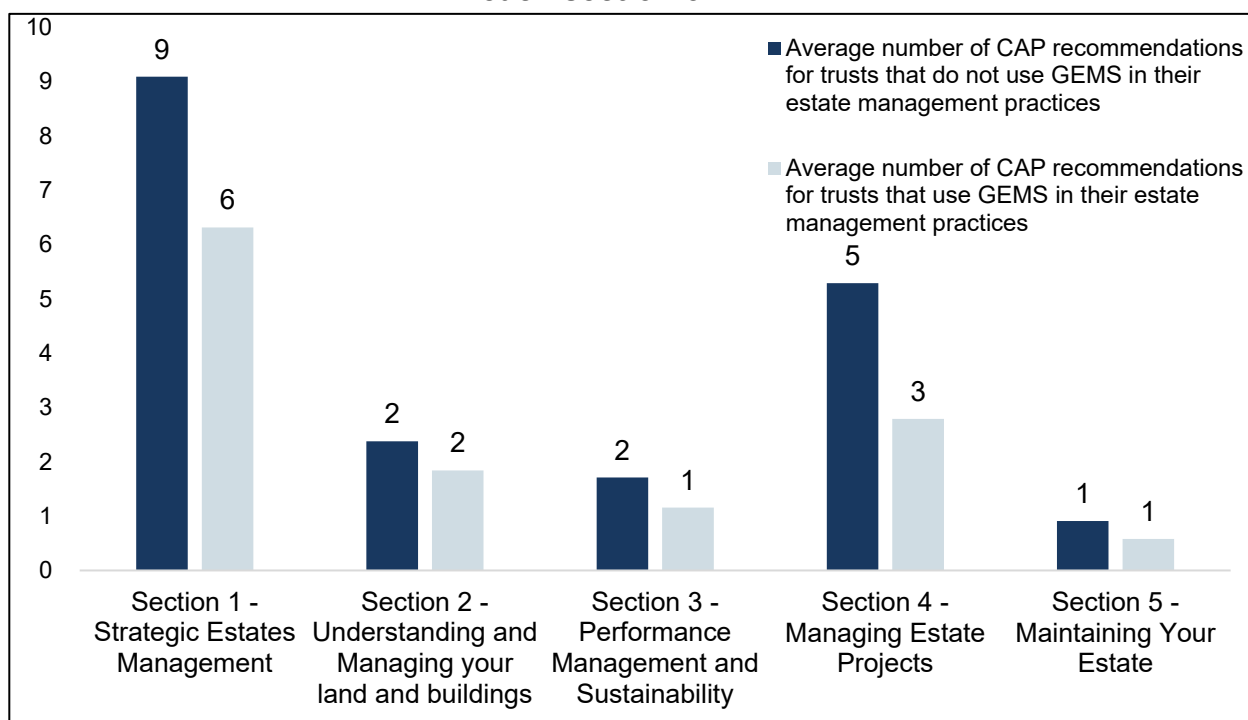
Figure 1: Awareness and use of GEMS guidance and tools across part 2 trusts



Trusts that use GEMS to support their estate management practices received statistically significant fewer capital adviser recommendations in comparison to trusts that did not or did only in part. This has been consistently the case across all 3 stages of the programme. On average, trusts that used GEMS across their estate management practices received 14 recommendations, compared to 20 for those that did not.

Notably, GEMS appears to have had the biggest impact on Strategic Estates Management and Managing Estate Projects, where GEMS users received fewer recommendations (see figure 2 below). Like previous rounds of the programme, none of the 64 trusts that participated in part 2 fully adhered to effective estate management practice in line with GEMS.

Figure 2: Average number of recommendations per GEMS user/non-user across each section of CAP



CAP is projected to help improve participating trusts' good estate management practices by 25 percentage points. With the recommendations, support and advice provided, alignment with good practice is projected to increase from 65% to 90%² overall. All 64 trusts confirmed they would be undertaking some, or all the CAP recommendations. This is projected to enable these trusts to achieve a variety of benefits and improvements,

² Projected increase is calculated by taking the average score of the intention to implement the recommendations.

including cost savings, improved risk management, energy and carbon reduction, resource and efficiency savings and improved capability.

The level of trust awareness and usage of GEMS for participating trusts since the 2021 pilot has generally risen.

The average number of recommendations across the entire programme is 17, with a median of 18 (the recommendations are evenly distributed).

Across all sections of the pre-engagement questionnaire, trusts consistently ranked their own level of good estate management practices higher than what capital advisers found when visiting them. Due to a lack of expertise, many trusts had challenges with identifying good practice across building condition data, strategic documentation and how effective maintenance should be undertaken across the estate.

There were risks associated with trusts believing they had good practices in place but did not. Such risks included inaccurate condition surveys missing key risks across the estate, lack of budget planning potentially leading to inadvisable investments and maintenance plans missing assets across the estate.

This is a trend that was also found in the pilot and part 1. Across all parts of CAP, the largest variance between trusts scores for having good practice in place against capital adviser findings was on estate data: section 2 – understanding and managing your land and buildings.

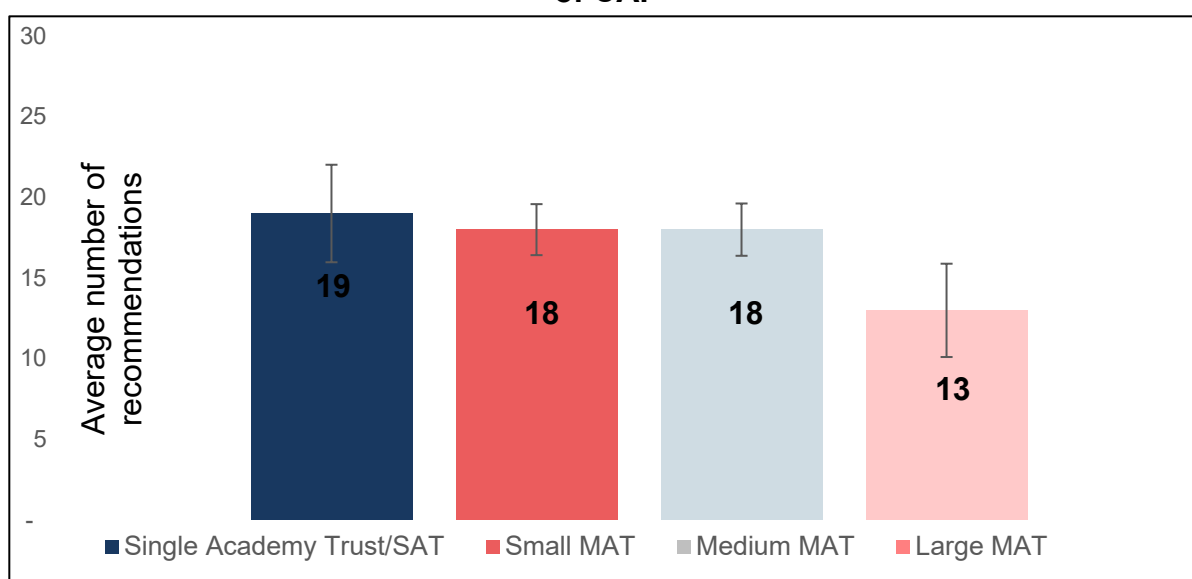
A key reason for this variance was due to trusts' understanding of what good practice looked like across building condition surveys, suitability and sufficiency surveys and asset registers. Advisers found those that did have this documentation were often outdated, lacked data, or were based on Condition Data Collection (CDC).

Single and small trusts received the highest number of recommendations. On average they received 6 more recommendations (20) compared to large MATs, which received 14.

Single academies and small trusts often have limited scale, resulting in smaller budgets and funding compared to medium and large trusts. Given these restricted budgets, smaller trusts often lack sufficient funds to employ a dedicated estates specialist. This led existing trust staff to take on additional duties and responsibilities beyond their roles to fill gaps in estate management.

Similarly, where smaller trusts did not have the necessary estate management capability internally, they were restricted in their ability to buy in the specialist support required. This was highlighted in the number of recommendations for SATs and small MATs across section 1 - strategic estate management and section 4 - managing estate projects. Both sections relied on trusts being able to develop their own internal strategies, policies, and documentation on how decision-making, spending, prioritisation and good estate management practices would be undertaken across the estate.

Figure 3: Average number of CAP recommendations by trust size across all parts of CAP



Across all parts of the programme, SATs received the highest average number of recommendations (19) compared to large MATs (13). SATs were often found to have limited scale, resulting in smaller budgets and funding compared to larger trusts. Traditional school staffing models were more common in SATs, with a premises caretaker or site manager handling estates roles and business/finance manager covering finance and operations.

Staff at small trusts focused their limited available time on achieving 'quick wins' and were often caught up in day-to-day operational management rather than growth and development. Overall, this limited the progress made around implementing good estate management practices.

Despite the current economic climate, inflation and construction market volatility, just under half of trusts (31 out of 64) believed the recommendations would help them obtain better value for money in project delivery. Data from trusts suggested that the recommendations could potentially achieve a combined saving of £3.6 million across the delivery of their projects.

Most trusts, 48 out of 64 (75%), predicted that CAP recommendations would help them obtain better value for money in the maintenance and operation of their estates, with a combined potential saving of £2.1 million. The recommendations focused on supporting trusts to achieve a safe and compliant environment before driving cost savings and innovation. Given the existing pressures on operational budgets, the findings suggest that the recommendations could help trusts achieve cost savings in the maintenance and operation of their estates. Recommendations to integrate centralised digital systems to monitor works and services, standardise service specifications and providers across the estate, and package maintenance works have enabled trusts to focus on future cost reductions.

Over half of all trusts (71 out of 134) said CAP recommendations will help them achieve savings in the delivery of their projects. Despite not all trusts being asked to provide estimates, those that did have suggested over £4m of savings across project delivery over a 2 year period could be achieved³.

115 out of 134 trusts (85%) stated they were experiencing cost and wider issues due to economic market conditions, the recommendations were considered timely to support improved project planning, developing accurate budget estimates and seeking opportunities to reduce costs and disruption.

Feedback indicates that 38 out of 64 trusts (59%) believed that CAP recommendations would help them reduce their energy usage, with an estimated combined potential saving of £2.5 million. CAP recommendations provided trusts with advice and guidance on how to use their buildings more efficiently and effectively, as well as information on wider funding opportunities to support future sustainability and decarbonisation.

Despite the 62 out of 64 trusts that received CAP recommendations on energy improvement plans confirming they will implement them, 38% (24 trusts) stated they don't anticipate achieving any usage or cost reductions. These trusts anticipated higher levels of investment would be required to focus on more efficient infrastructure, training, and broader regimes to drive carbon reduction. Some trusts believed that carbon reduction

³ This data was only routinely collected in part 2, but an estimate was provided by 1 trust in CAP part 1.

infrastructure, such as air source heat pumps, may increase their energy bills due to the reliance on electricity instead of gas.

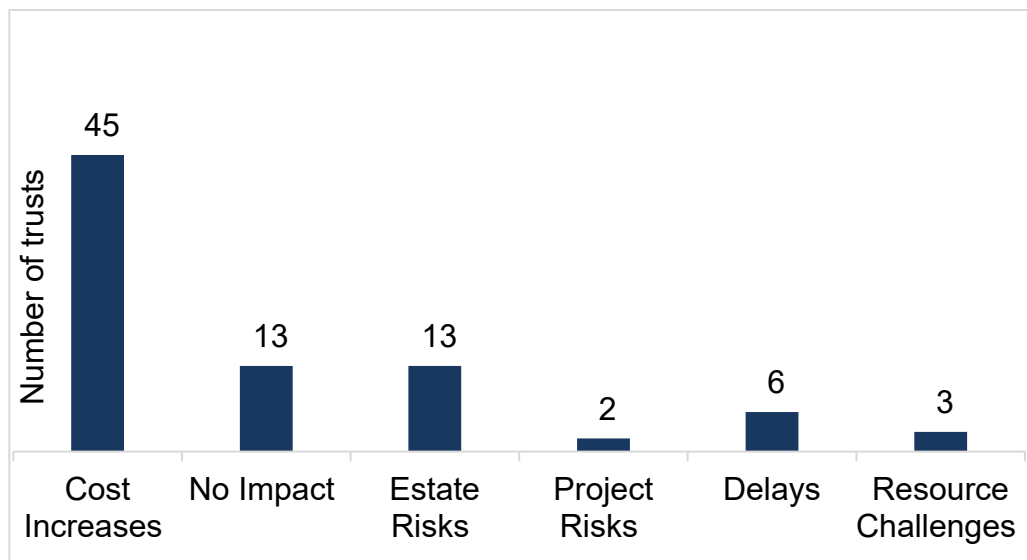
CAP part 2 recommendations could potentially help save over 12,000 tonnes of carbon output based on trusts' estimates on their potential energy reductions. Using trusts' estimated energy savings from CAP recommendations and their overall usage in kW/h and carbon output, over 12,000 tonnes⁴ of carbon could potentially be saved over the next 2 years. These savings would be equivalent to the carbon emissions from 1,000 households planting 10,000 trees to absorb carbon emissions over 50 years, or taking 2,800 cars off the road for one year.

One of the main challenges highlighted by trusts, was the effect of financial and economic market conditions on their estate management practices. 84% of trusts (51 out of 64) stated that they had directly experienced detrimental impacts to their estate management operations due to economic market conditions in the construction and maintenance sectors. The most common impact was cost increases which directly influenced wider issues around estate risks and project delays.

Rising contractor costs and material prices mean trusts are getting fewer projects delivered for more money across their estates. Market conditions, along with limited experience, have led trusts to make some poorly informed decisions on cutbacks to focus on savings. This could potentially result in additional risks across the estate. Trusts were making cutbacks where possible to ease budget pressures and free up funds for other priority areas not relating to estate management. These impacts were also found to cause wider issues for trusts, such as not having sufficient funds to recruit suitable professionals for estate management and difficulty with obtaining competent and qualified contractors.

⁴ This figure is based on feedback from 38 of the 64 (59%) participating trusts on their estimated percentage savings, applying these savings to their current total energy usage across their estate. Display Energy Certificates (DEC) for each eligible building across each trust were analysed to calculate total carbon output with the percentage savings applied. It was also based on allowing 1 year for trusts to implement the recommendations before realising savings the following year.

Figure 4: Trust feedback on the impact that current financial and economic market conditions have had on their estate management practices



86% of trusts (115 out of 134) across the programme stated that current economic market conditions have negatively affected their estate management operations. Trusts outlined that the combination of inflation, energy, construction, and wage rises, and limited contractor capacity have all put pressure on existing budgets and their ability to effectively manage, operate and improve their estate

Trusts in rural areas commonly outlined challenges concerning limited contractor availability, recruitment of staff and high construction and operational costs due to their geographical location. Trusts in rural areas commonly stated they struggled to get 3 quotations from contractors to satisfy value for money and that lead times for materials and project start dates were long due to their remote location. The recruitment of suitably qualified estates professionals and getting access to external specialists was also a major challenge for rural trusts. This was due to their location, with many specialist organisations and resources being located closer to urban areas and reluctant to travel long distances to rurally based trusts. Overall, this added additional pressures and challenges for rurally based trusts to obtain the resource, support, and expertise to be able to drive good estate management practices due to their location.

94% of trusts (60 out of 64) stated that CAP recommendations will be beneficial in helping them to more effectively identify and manage their key condition and compliance obligations across their estate. The recommendations provided were focused around supporting trusts to improve their estate data, effectively prioritise investment needs and adopt longer-term planning of projects. This would help trusts identify their actual key

estate needs, prioritising investment areas across the estate to ensure a 'safe, dry and warm' environment for pupils, staff, and wider building users.

97% of trusts (62 out of 64) stated that they found the support, advice, and recommendations offered by CAP to be beneficial to their organisation. This was reinforced by 94% of trusts (60 out of 64) confirming that they were planning on undertaking actions based on the support, advice and recommendations provided by their capital adviser.

Conclusion

The findings from part 2 closely align with those gathered from the pilot and part 1, further highlighting the challenges faced by trusts and demonstrating the value of CAP to improve trust estate management practices.

The programme received positive feedback from almost all participating trusts, who have collectively agreed that the recommendations will support them in improving their estate management and is estimated to collectively save over £8m over the next 2 years. Trusts tell us that these projected savings can be reinvested back into the school system to support a safe and effective teaching and learning environment.

A key finding across the programme indicates that despite a high level of awareness of GEMS tools, guidance, and checklists, their full use by trusts remains comparatively low. Therefore, trusts were found to not fully understand or appreciate the support and guidance that GEMS could provide in improving their estate management practices.

Regardless of their size and geography, trusts commonly stated they encountered challenges associated with cost increases. Additionally, recruitment, skills, capability and the development of competent and experienced estate professionals were identified as key challenges across the sector.

Based on findings across the pilot and parts 1 and 2, and wider insight across the school sector, CAP support is deemed most beneficial to single academy, small and medium sized trusts. The findings suggest that small and medium trusts that are in the earlier stages in their development and in the CIF to SCA transition would achieve the most benefit from the programme. However, more mature trusts and those of a larger scale were found to still require help, support, and guidance.

Allowing for initial investment costs, CAP could potentially bring over £7.9m⁵ of value creation for participating trusts after 2 years. This suggests that CAP can bring a strong return on investment to trusts with high condition need, in addition to coaching trusts through supporting good estate management practices that focus on risk management, resource efficiencies and capability development.

Next steps

The next phase of CAP will revisit trusts that participated in CAP part 1 during the 2024/25 academic year. All 50 part 1 trusts will be invited to a follow up visit from a

⁵ The initial investment cost of CAP has been calculated based on an average sum of £4,000 per trust, equating to £264,000 for the 64 trusts involved in the programme. Once the investment cost is deducted from trusts' estimated potential savings, this can lead to £7.9m of potential value.

capital adviser to see if they have implemented any of their recommendations and the resulting impact on estate management practices.

The Capital Advisers Programme will build trust and maintain its high level of engagement with participating trusts, emphasising its coaching and supportive principles. The programme will continue to enhance its offer to trusts based on their feedback. Part 3 will be CAP's final phase of delivery. The 3-year research phase of CAP will end in March 2025.

Annex

Pre-engagement and post-engagement questions

Participating trusts were asked 45 questions prior to engagement with their assigned adviser. At the end of each programme, they were asked 45 corresponding questions to gauge the impact of the advisers' visits. These are the paired questions. There were also 5 additional questions asked as part of the post-engagement questionnaire which can be found at page 57.

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
Section 1 – strategic estate management				
SECTION 1.1 - estate vision				
1.1.1	Is your trust aware of the Good Estate Management for Schools (GEMS) organisational self-assessment tool?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser pre-engagement questionnaire we previously asked: Is your trust aware of the Good Estate Management for Schools (GEMS) organisational self-assessment tool? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No 	<ul style="list-style-type: none"> • Yes • In part • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			Following on from the capital adviser meeting discussions, is your trust now aware of the Good Estate Management for Schools (GEMS) organisation self-assessment tool?	
1.1.2	Does your trust use the Good Estate Management for Schools (GEMS) organisational self-assessment tool?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser pre-engagement questionnaire we previously asked: Does your trust use the Good Estate Management for Schools (GEMS) organisational self-assessment tool? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, is your trust seeking to use the Good Estate Management for Schools</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			(GEMS) organisation self-assessment tool?	
1.1.3	Is your trust aware of the Good Estate Management for Schools Estate management competency framework?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser pre-engagement questionnaire we previously asked: Is your trust aware of the Good Estate Management for Schools Estate management competency framework? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, is your trust now aware of the Good Estate Management for School</p>	<ul style="list-style-type: none"> • Yes • In part • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			Estate management competency framework?	
1.1.4	Does your trust use the Good Estate Management for Schools Estate management competency framework?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser pre-engagement questionnaire we previously asked: Does your trust use the Good Estate Management for Schools Estate management competency framework? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, is your trust seeking to use the Good Estate Management for School</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			Estate management competency framework?	
1.1.5	Does your trust have an estate vision?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme post-engagement questionnaire we previously asked: Does your trust have an estate vision? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, is your trust seeking to finalise and implement an estate vision as per recommendations?</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
1.1.6	Has your trust estate vision been developed, reviewed and approved by your board/ governing body?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Has your trust estate vision been developed, reviewed and approved by your board/ governing body? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to ensure that the estate vision is developed, reviewed approved by your board/ governing body?</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
1.1.7	Does your trust regularly review and update your estate vision alongside your educational vision?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust regularly review and update your estate vision alongside your educational vision? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to update the estate vision alongside the education vision?</p>	<ul style="list-style-type: none"> • Yes • Considering • No
SECTION 1.2 - estate strategy				

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
1.2.1	Does your trust have an estate strategy that aligns with your estate vision?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust have an estate strategy that aligns with your estate vision? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to finalise and implement an estate strategy that aligns with the trust education vision?</p>	<ul style="list-style-type: none"> • Yes • Considering • No
1.2.2	Has your trust estate strategy been reviewed and approved by your board/ governing body?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Has your trust estate</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<p>strategy been reviewed and approved by your board/ governing body? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to ensure that the estate strategy is developed, reviewed approved by your board/ governing body?</p>	
1.2.3	Is your trust estate strategy reviewed and updated on an annual basis?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Is your trust estate strategy reviewed and updated on an annual basis? You answered:</p> <ul style="list-style-type: none"> • Yes 	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<ul style="list-style-type: none"> • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to review and update the estate strategy on an annual basis?</p>	
SECTION 1.3 - asset management plan				
1.3.1	Does your trust have an asset management plan?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust have an asset management plan? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			your trust be seeking to update and/ or implement as asset management plan as per recommendations?	
1.3.2	Has the trust asset management plan been reviewed and approved by your board/ governing body?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Has the trust asset management plan been reviewed and approved by your board/ governing body? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking ensure that the asset management plan is</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			developed, reviewed approved by your board/ governing body?	
1.3.3	Is your trust asset management plan reviewed and updated alongside your estate strategy on an annual basis?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Is your trust asset management plan reviewed and updated alongside your estate strategy on an annual basis? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to review and update the asset management plan alongside the estate strategy on an annual basis?</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
1.3.4	Does your trust have a prioritised estate maintenance and investment plan that covers all of your school estate by category and priority?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust have a prioritised estate maintenance and investment plan that covers all of your school estate by category and priority? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to update and implement a prioritised estate and maintenance investment plan covering the entire estate?</p>	<ul style="list-style-type: none"> • Yes • Considering • No
SECTION 1.4 - planning and organising estate resources				

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
1.4.1	Is your trust aware of the good estate governance guide?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Is your trust aware of the good estate governance guide?</p> <p>You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, is your trust now fully aware of the good estate governance guide?</p>	<ul style="list-style-type: none"> • Yes • Considering • No
1.4.2	Does your trust use the good estate governance guide or have similar processes in place to ensure that key areas are complied with?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust use the good estate governance guide or have similar processes in place to</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<p>ensure that key areas are complied with? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to use the good estate governance guide or adopt similar processes to ensure key areas are complied with?</p>	
1.4.3	Does your trust have a clear operational, management and senior leadership structure which clearly outlines the roles, responsibilities, and accountabilities across your organisation?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust have a clear operational, management and senior leadership structure which clearly outlines the roles, responsibilities, and</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<p>accountabilities across your organisation? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, does your 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?</p>	
1.4.4	Does your trust have a 3 to 5-year budget plan for your estate?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust have a 3 to 5-year budget plan for your estate? You answered:</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to update and implement a 3-to-5-year budget plan for your estate?</p>	
1.4.5	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?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: 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? You answered:</p> <ul style="list-style-type: none"> • Yes • In part 	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<ul style="list-style-type: none"> • No <p>Following on from the capital adviser meeting discussions, will your 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?</p>	
SECTION 2 - understanding and managing your land buildings				
2.1	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?	<ul style="list-style-type: none"> • Yes • In part • No 	Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust have a centralised database system where all property, compliance and estate data are accessible to all	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<p>schools and the wider estate teams? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your 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?</p>	
2.2	<p>Does your trust have all records of legal interests regarding the estate land and buildings including:</p> <ul style="list-style-type: none"> • the nature of legal ownership, whether freehold or leasehold 	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked:</p> <p>Does your trust have all records of legal interests regarding the estate land and buildings including:</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
	<ul style="list-style-type: none"> • other controlling interests such as charitable restrictions • any restrictions that impact on the use of land and buildings • any third-party ownership, etc. 		<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. <p>You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your 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?</p>	

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
2.3	Does your trust have an up to date (within previous 5 years) condition survey for each school?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme post-engagement questionnaire we previously asked: Does your trust have an up to date (within previous 5 years) condition survey for each school?</p> <p>You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to obtain, update and implement up to date building and M&E condition surveys across the estate?</p>	<ul style="list-style-type: none"> • Yes • Considering • No
2.4	Does your trust have an up-to-date suitability and sufficiency assessment with a list of any	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust have an</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
	recommendations and requirements for each school?		up-to-date suitability and sufficiency assessment with a list of any recommendations and requirements for each school? You answered: <ul style="list-style-type: none"> • Yes • In part • No Following on from the capital adviser meeting discussions, will your trust be seeking to obtain, update and implement up to date suitability and sufficiency assessments across the estate?	
Section 3 - Performance management and sustainability				
3.1	Does your trust have a Climate Action Plan?	<ul style="list-style-type: none"> • Yes • In part • No 	Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust have a	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<p>Climate Action Plan? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting, will your trust be developing and implementing a Climate Action Plan?</p>	
3.2	Does your trust undertake any energy and utilities monitoring across your estate?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust undertake any energy and utilities monitoring across your estate? You answered:</p> <ul style="list-style-type: none"> • Yes • In part 	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<ul style="list-style-type: none"> • No <p>Following on from the capital adviser meeting, will your trust be implementing new or existing procedures for monitoring and benchmarking energy and utilities usage across the estate?</p>	
3.3	Has your trust developed any energy and utilities improvement plans, such as planned decarbonisation projects and energy saving initiatives?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Has your trust developed any energy and utilities improvement plans, such as planned decarbonisation projects and energy saving initiatives? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No 	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			Following on from the capital adviser meeting, will your trust be setting out and implementing any new or existing capital project works or energy saving approaches across the estate?	
3.4	Does your trust have a Heat Decarbonisation Plan for each school?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust have a Heat Decarbonisation Plan for each school? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting, will your trust be implementing Heat</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			Decarbonisation Plans across each school?	
3.5	<p>Has your trust experienced challenges with rising energy costs?</p> <p>If Yes/ In-part, what has been your estimated annual increases across your trust?</p>	<ul style="list-style-type: none"> • Yes • In part • No <p>If Yes/ In-Part, please enter the percentage impact on cost</p> <ul style="list-style-type: none"> • Up to 5% • 6-10% • 11-15% • 16-20% • 20-30% • More than 30% <p>3.5.1 If Yes/ In-part, what would best</p>	<p>Based on your experience of the Capital Adviser Programme, do you believe the capital adviser programme recommendations will help your trust to reduce energy usage across the estate?</p> <p>If Yes/ In-part, could you provide a percentage or cost estimation that these recommendations may generate (without taking rising energy costs into account)?</p>	<ul style="list-style-type: none"> • Up to 5% • 6-10% • 11-15% • 16-20% • 20-30% • More than 30%

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
		<p>describe the implications that rising energy costs have had on your trust?</p> <ul style="list-style-type: none"> • the trust has had to postpone or delay funding to projects • the trust has had to begin using funding reserves • the trust has had to seek cost reductions elsewhere to support energy cost increases • all of the above 		
SECTION 4 – managing estate projects				
Section 4.1 - identifying, planning and prioritising projects				

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
4.1.1	<p>Is your trust aware of the Good Estates Management for Schools estate projects checklist?</p> <p>This can be found on the following link: https://www.gov.uk/guidance/good-estate-management-for-schools/tools-and-checklists</p>	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Is your trust aware of the Good Estates Management for Schools estate projects checklist?</p> <p>This can be found on the following link: https://www.gov.uk/guidance/good-estate-management-for-schools/tools-and-checklists You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, is your trust now fully aware of the</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			Good Estates Management for Schools estate projects checklist?	
4.1.2	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?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme post-engagement questionnaire we previously asked: 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? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, does</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			your trust intend on using the Good Estates Management for Schools estate projects checklist?	
4.1.3	Does your trust allocate building projects funding to schools based on your existing estate strategy, asset management plan and condition investment programme needs?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust allocate building projects funding to schools based on your existing estate strategy, asset management plan and condition investment programme needs? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to allocate all</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			building project funding to schools based on your existing estate strategy, asset management plan and condition investment programme needs?	
4.1.4	Does your trust centrally manage all building projects across your schools?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust centrally manage all building projects across your schools? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust be seeking to centrally</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			manage all building projects across your schools?	
Section 4.2 - effective project planning				
4.2.1	When undertaking building projects, does your trust appoint a professional adviser to support with the development of feasibility, design and specifications?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: When undertaking building projects, does your trust appoint a professional adviser to support with the development of feasibility, design and specifications? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, does</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			your 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?	
4.2.2	When undertaking building projects, does you trust employ the services of a specialist adviser/ consultant to support with Construction Design and Management Regulations 2015?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: When undertaking building projects, does you trust employ the services of a specialist adviser/ consultant to support with Construction Design and Management Regulations 2015?</p> <p>You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No 	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			Following on from the capital adviser meeting discussions, does your 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				
4.3.1	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?	<ul style="list-style-type: none"> • Yes • In part • No 	Within the capital adviser programme pre-engagement questionnaire we previously asked: 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	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<p>tender and deliver works? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, does your 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?</p>	
4.3.2	When undertaking building projects, does your trust implement measures to ensure value for money is being achieved?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: When undertaking building projects, does your trust implement measures to ensure value for</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<p>money is being achieved? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your trust seek to ensure that a robust method of achieving value for money is being implemented across the estate?</p>	
<p>4.3.3</p> <p>4.3.3.1</p>	<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>4.3.3.</p> <ul style="list-style-type: none"> • Yes • No <p><i>**If they select yes for Q 4.3.3 then the following drop down menu is provided:</i></p> <p>4.3.3.1 options:</p>	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Has your trust experienced any challenges in the ability to deliver capital building projects due to rising construction and material</p>	<p>Obtain better value for money across the delivery of trust projects?</p> <ul style="list-style-type: none"> • Yes • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
	<p>If Yes/ In-part, what would best describe the implications that construction challenges have had on your trust?</p>	<ul style="list-style-type: none"> • the trust has had to postpone or delay funding to projects • the trust has had to begin using funding reserves • the trust has had to seek cost reductions elsewhere to help address construction challenges • all of the above 	<p>costs, labour shortages and contractor availability?</p> <p>You answered:</p> <p><i>**Provide the answer they provided at pre-engagement stage</i></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>If yes, could you provide an estimate of percentage savings the recommendations may help you save across your trust capital investment projects per annum?</p> <ul style="list-style-type: none"> • Up to 5% • 6-10% • 11-15% • 16-20% • 20-30% • More than 30% <p>Gain a better understanding of key condition, compliance and investment priorities across your estate?</p>

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
				<ul style="list-style-type: none"> • Yes • No
Section 4.4 - project delivery				
4.4.1	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?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: 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? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No 	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			Following on from the capital adviser meeting discussions, does your 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?	
4.4.2	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?	<ul style="list-style-type: none"> • Yes • In part • No 	Within the capital adviser programme pre-engagement questionnaire we previously asked: 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	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<p>requirements and expectations? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussions, will your 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>	
Section 4.5 - project handover and review				

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
4.5.1	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?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: 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? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussion, will</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			your 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?	
4.5.2	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?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: 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? You answered:</p> <ul style="list-style-type: none"> • Yes • In part 	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<ul style="list-style-type: none"> • No <p>Following on from the capital adviser meeting discussion, does your 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?</p>	
Section 5 - maintaining your estate				
5.1	Following on from completion of your building projects do you review and update your fire safety plan and or other statutory testing/inspection schedules?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Following on from completion of your building projects do you review and update your fire safety plan and or other</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<p>statutory testing/inspection schedules? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussion, does your 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?</p>	
5.2	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?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: Does your trust have a detailed health and safety, facilities management, planned and reactive maintenance and statutory</p>	<ul style="list-style-type: none"> • Yes • Considering • No

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
			<p>compliance inspection programme in place for each school? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussion, does your 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>	

Section	Pre-engagement question	Pre-engagement response options	Post-engagement questionnaire	Post-engagement response options
5.3	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?	<ul style="list-style-type: none"> • Yes • In part • No 	<p>Within the capital adviser programme pre-engagement questionnaire we previously asked: 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? You answered:</p> <ul style="list-style-type: none"> • Yes • In part • No <p>Following on from the capital adviser meeting discussion, does your 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>	<ul style="list-style-type: none"> • Yes • Considering • No

Post-engagement questions only

Section	Post-engagement question	Post-engagement response options
5.4	<p>Overall, do you believe that the capital adviser recommendations will support your trust to obtain better value for money across the maintenance and operation of your estate?</p> <p>If Yes, what percentage reduction in cost do you estimate that these recommendations may help you save across your trust per annum?</p>	<ul style="list-style-type: none"> • Yes • No • Up to 5% • 6-10% • 11-15% • 16-20% • 20-30% • More than 30%
5.4	<p>Overall, do you believe that the capital adviser recommendations will support your trust to obtain better value for money across the maintenance and operation of your estate?</p> <p>If Yes, what percentage reduction in cost do you estimate that these recommendations may help you save across your trust per annum?</p>	<ul style="list-style-type: none"> • Yes • No • Up to 5% • 6-10% • 11-15% • 16-20%

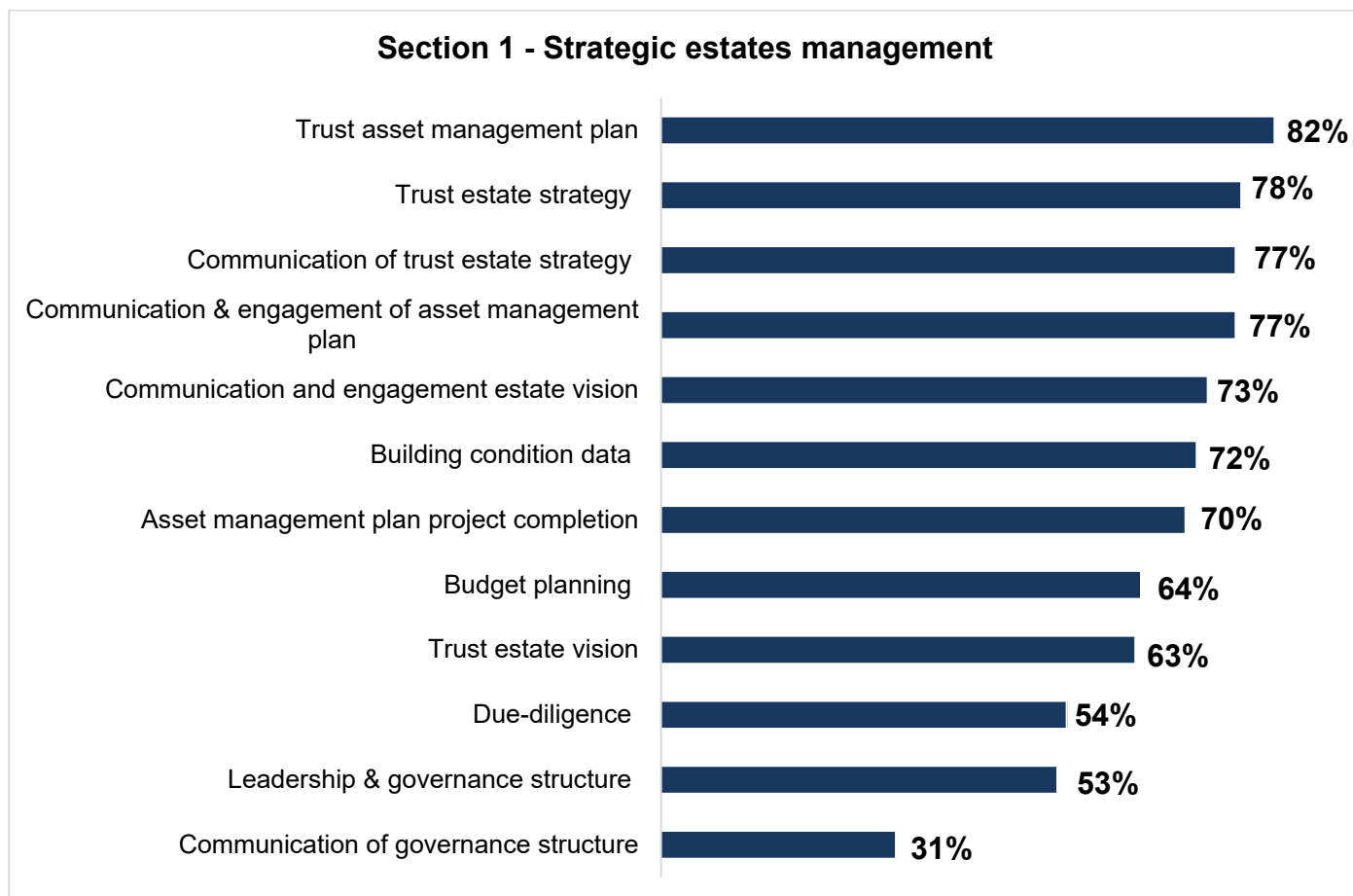
Section	Post-engagement question	Post-engagement response options
		<ul style="list-style-type: none"> • 20-30% • More than 30%
5.5	Overall, do you believe that the capital adviser recommendations will support your trust with the management of health and safety (including building structural safety), compliance and maintenance obligations across your estate?	<ul style="list-style-type: none"> • Yes • In-part • No
Post-engagement question 1	<p>How beneficial has the trust found the Capital Advisers Programme in supporting you to improve your estates management practices across?</p> <ul style="list-style-type: none"> • Section 1 - estate vision, strategy and planning • Section 2 - understanding and managing your land buildings • Section 3 - performance management and sustainability • Section 4 - managing estate projects • Section 5 - maintaining your estate 	<ul style="list-style-type: none"> • No benefit – the process did not align with expectations • Beneficial engagement but no changes planned/required – assurance provided • Beneficial and limited actions planned as a result – assurance provided, and some actions planned • Very beneficial and actions planned as a result <p>Please provide any specific impacts if applicable [free text box next to each of the above]</p>
Post-engagement question 2	Based on your experience of the Capital Advisers Programme, at what point would a capital adviser bring the most value to you in your growth journey as a trust?	<ul style="list-style-type: none"> • Upon academising • Before moving from the Condition Improvement Fund (CIF) to School Condition Allocation (SCA)

Section	Post-engagement question	Post-engagement response options
		<ul style="list-style-type: none"> • Just after moving from the Condition Improvement Fund (CIF) to School Condition Allocation (SCA) • 2-3 years after moving from the Condition Improvement Fund (CIF) to School Condition Allocation (SCA) • Once a long-established large MAT
Post-engagement question 3	The following questions are concerned with your relationship with, and the performance of, the capital adviser who visited.	<p>The amount of time you worked with the adviser was:</p> <ul style="list-style-type: none"> • Too long • Long enough • Not long enough <p>If not 'Long enough' - How long would you have liked? [free text box]</p>
Post-engagement question 4	The capital adviser:	<ul style="list-style-type: none"> • was able to effectively use evidence to inform discussions. • built an effective relationship with the estate manager and relevant senior leaders. • struck the correct balance between constructive challenge and support.

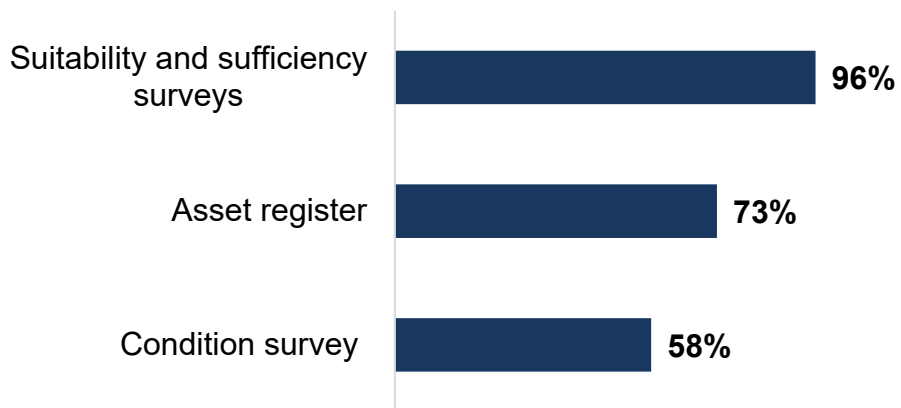
Section	Post-engagement question	Post-engagement response options
		<ul style="list-style-type: none"> • demonstrated an understanding of the unique context and challenges facing your organisation. • any other comments [text box]
Post-engagement question 5	Please provide feedback on the aspects of the Capital Advisers Programme, that you feel could be improved upon to benefit any future programmes.	[Free text box]

Advisers' assessment results

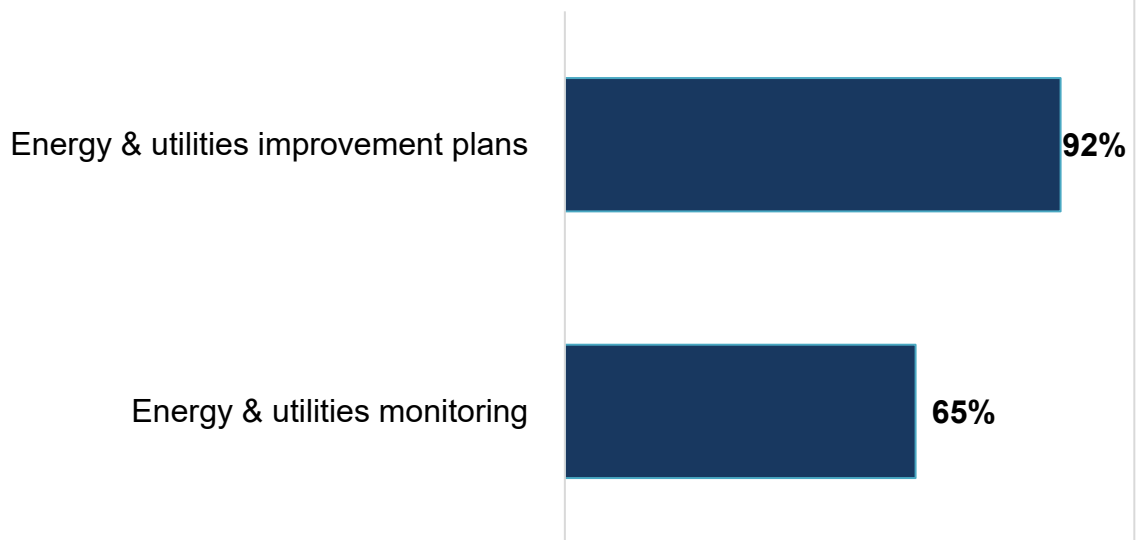
The practice of participating academy trusts was assessed over 31 areas of estate management. Based on these findings, capital advisers issued recommendations to each trust as categorised under the 5 key sections. The following figures show the percentage of academy trusts that received recommendations from capital advisers for each of the 5 key sections over the entire CAP programme to date (134 trusts).



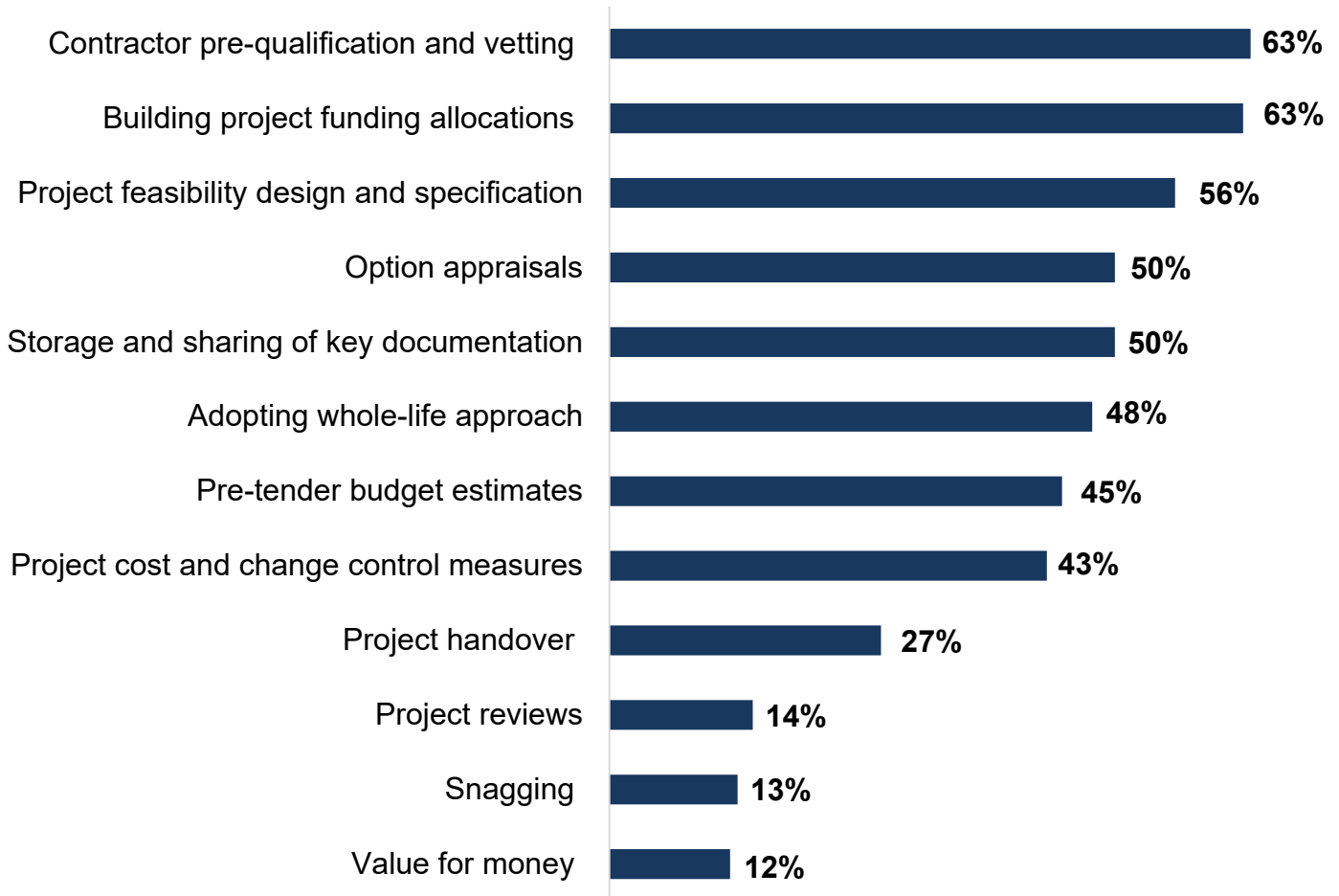
Section 2 - Understanding and managing your land and buildings



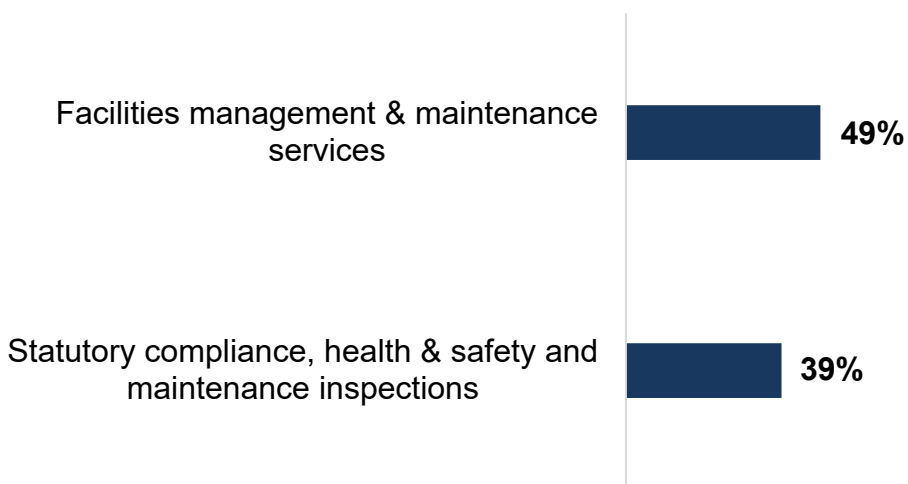
Section 3 - Performance management and sustainability



Section 4 - Managing estates projects



Section 5 - Maintaining your estate



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