



Department  
for Education

# **School estate management standards**

**Policies and processes required to  
manage the school estate effectively**

**April 2025**

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## Foreword

We are a mission-led government, dedicated to breaking down the barriers to opportunity and giving every child the best start in life. We can't do that without well-maintained sites, where children and young people can learn safely.

This is why good estates management, delivered by professionals and school leaders, is fundamental to our mission to spread opportunity across the country.

We value your open and honest engagement, co-authoring advice to support all schools to do their work well. It's the kind of collaborative approach that will help us to raise standards across the board, and open-up education opportunities for all.

The School Estate Management Standards are designed to support schools to manage their estates effectively. They help them to prioritise projects within their estate, build on good practice, and observe legal requirements. They were created with support and input from a number of schools and their representative bodies.

The document gives practical advice on the basics of managing a school estate, and how to progress to fully achieving effective practice. It also signposts users to expert advice. I hope you will find this a useful tool to help you achieve your ambitions for your school estate.

Thank you for everything you do to make our schools a place where children can safely enjoy learning and access the opportunities they deserve.

**Stephen Morgan MP**

**Minister for Early Education**

**Department for Education**

## Summary

Keeping school estates safe, well-managed, and operational is complex. Various aspects are important, including funding, the condition of buildings, and effective estate management. These standards address the estate management aspect, which consist of two key elements:

- [Estate management competency framework](#) (published June 2023) setting out the skills and qualifications required of school estate managers; and
- School estate management standards (this document) – estate management practices and processes.

There are four levels of estate management standards:

- Level 1 – baseline
- Level 2 – transitioning
- Level 3 – fully effective
- Level 4 – advanced

Our aim is to support all schools in a practical and non-judgemental way, to understand where to start, how to progress and prioritise, and how to make best use of expert advice. All schools should be at Level 1 as the baseline starting point and progressing to Level 3. Schools may wish to progress to Level 4, if this fits their strategic aims.

### **The standards will be reviewed before May 2026**

If you have any queries about this guidance, or if you would like to provide feedback, email [SchoolEstate.MANAGEMENTSTANDARDS@education.gov.uk](mailto:SchoolEstate.MANAGEMENTSTANDARDS@education.gov.uk). For all other queries, contact us using the [customer help portal](#).

## Who is this publication for?

Those overseeing, managing, and working in estates, property, and infrastructure within schools.

This includes:

- proprietors, school and academy leaders
- governors and academy trustees
- school business professionals
- those with responsibility for the day-to-day running of the school estate
- local authorities
- diocesan authorities and other religious authorities
- trustees of schools, including academy trusts, which means the members of the foundation which established the school - In foundation schools or voluntary schools, the trustees are therefore the members of the foundation that established the school.

For schools and academies with a religious character the trustees will be:

- the Church of England
- the Catholic Church
- other religious bodies

This information is intended for those working in estates, property, and infrastructure roles within schools.

## Estate management standards overview

These estate management standards were developed in collaboration with schools and others representing the sector and are aligned with various advice and guidance. They are an overarching principle, on which schools should build on in managing their estate effectively. They focus primarily on management of the school estate (land and buildings).

The Department for Education (DfE) sets out other important issues such as:

- buildings contents and consumables,
- purchasing,
- technical standards, and
- broader policies

You can find a link to some of these in the 'Further reading' section.

<b>Estate Management Standards</b>	<b>Overview</b>
<b>Level 1 - Baseline</b>	The basic essentials that all schools and their responsible bodies should have in place as they begin their journey to becoming fully effective. Some of these are already set out in legislation.
<b>Level 2 - Transitioning</b>	Building on level 1 - the key transition points in good practice in a school's ongoing journey.
<b>Level 3 - Fully effective</b>	All the components that should be in place for schools and their responsible bodies to manage their estate effectively.
<b>Level 4 - Advanced</b>	Additional activities schools and their responsible bodies could undertake to become advanced practitioners in estate management.

## Level 1 – Baseline

This covers the essentials that schools should have in place as they begin their journey to full effective estate management.

Area	Activities
<b>Strategic estate management</b>	<ul style="list-style-type: none"> <li>• You have policies, governance arrangements and documents in place to help you manage the estate. See <a href="#">The information you need to know about your estate</a>.</li> <li>• You have an estate strategy and asset management plan in place. These will link to the school's educational vision and the estate strategy of the relevant landowner (where appropriate).</li> <li>• The estate strategy outlines how you plan to invest in the estate over the next 3-5 years to meet any longer-term targets.</li> <li>• The asset management plan includes data about the estate, sets out action needed to maintain the estate, actions needed to achieve the estate strategy and aligns to the educational vision.</li> </ul> <p>The above will be reviewed, approved and signed off by the governing body, trustees or landowners.</p> <p>For more detailed guidance see <a href="#">Strategic estate management</a>.</p>
<b>Planning and organising your estate resources</b>	<ul style="list-style-type: none"> <li>• A governing board is in place, and it maintains oversight of the estate. The annual governors' or trustees' skills assessment should include detail of skills and expertise in estates management.</li> <li>• You have a named individual responsible for estate management.</li> <li>• You ensure budget forecasts in respect of estates management are accurate, based on realistic assumptions and reflective of lessons learned from previous years. The budgeting process and prioritisation of funding for estates management considers existing risk assessments.</li> <li>• You ensure regularity, propriety and value for money when procuring goods and services for estate management.</li> <li>• Continuity planning - You have continuity plans in place to cover any emergencies related to the estate.</li> </ul> <p>For more detailed guidance see <a href="#">Planning and organising your estate resources</a>.</p>

Area	Activities
<b>Understanding and managing your land and buildings</b>	<ul style="list-style-type: none"> <li>You understand the condition of all the land and buildings in the estate and the cost and priority of any works needed identified through an up-to-date building condition survey.</li> <li>You hold core data to help you manage the estate. This includes: <ul style="list-style-type: none"> <li>an asset register</li> <li>information relating to tenure</li> <li>accurate information about building areas</li> <li>a statutory compliance register</li> <li>an asbestos management plan</li> <li>sufficiency data</li> <li>information relating to running costs</li> <li>the number of buildings on each site</li> <li>a scaled building layout plan</li> <li>the number of floors in each building</li> <li>energy efficiency data including CO2 emissions and energy cost data</li> </ul> </li> <li>You assess all your land and buildings taking into consideration whether the estate and its facilities are fit for purpose and whether the estate has the right amount of space for the number of school places.</li> <li>You know the terms under which you occupy the land and buildings and understand what approvals you may require for any capital works and, if required, you ensure you have the landowner's permission to carry out any works.</li> <li>You have adequate levels of commercial insurance in place or are a member of DfE's Risk Protection Arrangement (RPA). If you are a member of DfE's RPA, you have assessed whether any additional commercial insurance is required.</li> </ul> <p>For more detailed guidance see <a href="#">Understanding and managing your land and buildings</a>.</p>
<b>Maintaining your estate</b>	<ul style="list-style-type: none"> <li>You maintain the land and buildings to make sure they are safe, warm, weatherproof and provide a suitable learning environment.</li> <li>You adhere to The Health and Safety Executive's (HSE) guidance on <a href="#">safe maintenance</a> of the estate.</li> </ul> <p>For more detailed guidance see <a href="#">Maintaining your estate</a>.</p>



<b>Health and safety</b>	<ul style="list-style-type: none"> <li>• You ensure the safety of pupils, staff and visitors by managing your <a href="#">statutory responsibilities</a> to minimise health and safety issues.</li> <li>• You have a health and safety policy in place that:</li> <li>• clearly defines and designates responsibilities <ul style="list-style-type: none"> <li>○ identifies all property related health and safety issues</li> </ul> </li> <li>• ensures that appropriate action is taken to avoid or minimise risks <ul style="list-style-type: none"> <li>○ monitors risks and issues</li> <li>○ follows the relevant legislation</li> </ul> </li> <li>• You have a risk register in place. Risk assessments have been carried out by appropriately trained staff within the last 12 months in line together with plans documenting control measures and how to reduce and mitigate risk.</li> <li>• All land and buildings within the estate are structurally safe. You have reported and actioned any changes in the land and building's structural condition using appropriate professional advice.</li> <li>• You know your duties as a client under <a href="#">CDM and the Building Regulations</a>.</li> <li>• You have a register of all plant and equipment that requires <a href="#">statutory inspection</a> and have contracts in place with third parties to ensure they are appropriately inspected.</li> <li>• You also have arrangements in place to deal with any maintenance requirements that may be identified. You will have a record of all statutory inspections that take place and hold all relevant certificates.</li> <li>• You undertake the following actions to ensure you are complying with <a href="#">Control of substances hazardous to health (COSHH) regulations</a>: <ul style="list-style-type: none"> <li>○ Undertake a COSHH risk assessment that investigates all potential health hazards that may arise from substances hazardous to health</li> <li>○ Put in place control measures to reduce or eliminate the risk of harm to health</li> <li>○ Ensure that all hazardous substances are kept in a locked storeroom</li> <li>○ Ensure that a log is kept of usage, storage and location of hazardous substances</li> <li>○ Ensure that the relevant staff are aware of any risk assessments and have had suitable training</li> </ul> </li> </ul> <p>For more detailed information see <a href="#">Health and safety</a>.</p>
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Area	Activities
<b>Fire safety</b>	<ul style="list-style-type: none"> <li>• You have a comprehensive up-to-date fire <a href="#">risk assessment</a> in place covering the whole estate which has been carried out by a competent person.</li> <li>• You have procedures in place to reduce the likelihood of a fire. Fire-fighting equipment is in place where required, fire evacuation procedures are clearly displayed, <ul style="list-style-type: none"> <li>○ you are aware of the evacuation drill, including arrangements for any vulnerable adults or children.</li> <li>○ Fire-fighting equipment must be inspected every 12 months or after it has been used.</li> <li>○ Fire exit door should be: <ul style="list-style-type: none"> <li>○ unobstructed</li> <li>○ kept unlocked; and</li> </ul> </li> </ul> </li> <li>• easy to open from the inside</li> <li>• You have a fire alarm system in place that is tested routinely, and these tests are recorded. The fire alarm system should be serviced every 6 months to check for the following: <ul style="list-style-type: none"> <li>• the condition of the alarm</li> <li>• whether the alarm sounds as it should</li> <li>• whether alarms in different parts of the building link back to the main fire panel</li> </ul> </li> </ul> <p>For more detailed guidance see <a href="#">Fire safety</a>.</p>
<b>Asbestos</b>	<ul style="list-style-type: none"> <li>• You have an up-to-date <a href="#">asbestos management survey</a> which has been carried out by a competent surveyor.</li> <li>• You have used the survey report to form an <a href="#">asbestos register</a> - a record of known and presumed asbestos in your premises.</li> <li>• You have an asbestos management plan which sets out the actions and activities required to manage the risk from asbestos. You review both documents annually.</li> </ul> <p>For more detailed guidance see <a href="#">Asbestos</a>.</p>
<b>Legionella</b>	<ul style="list-style-type: none"> <li>• You have an up-to-date legionella risk assessment in place which identifies, determines and controls the risk of exposure of building occupants to legionella. The risk assessment should also identify what controls are in place to reduce, eliminate or control any identified risks.</li> <li>• You ensure inspections are logged and carried out regularly.</li> </ul> <p>For more detailed guidance see <a href="#">Legionella</a>.</p>

Area	Activities
<b>Other</b>	<ul style="list-style-type: none"> <li>• You have a Display Energy Certificate (DSE) and advisory report in place. The DSE is in a prominent place and accessible to all users and the public.</li> <li>• The school perimeter is secure, and access is controlled accordingly.</li> <li>• There is separate, clearly marked access routes for pedestrians and vehicles.</li> <li>• Parking and playground areas are separate.</li> <li>• Trees are routinely inspected.</li> <li>• You have a plan in place to limit the exposure to radon gas (if applicable).</li> </ul>

## Level 2 – Transitioning

This covers the next set of priorities, building on the above. This stage is in addition to the standards listed in stage 1.

Area	Activities
<b>Strategic estate management</b>	<ul style="list-style-type: none"> <li>You have an estate vision and climate action plan in place. The climate action plan will outline plans to encourage action and build climate resilience in the estate and community. The climate action plan and strategic estate documents work together as part of the strategic estate management plan.</li> </ul> <p>For more detailed guidance see <a href="#">Strategic estate management</a>.</p>
<b>Planning and organising your estate resources</b>	<ul style="list-style-type: none"> <li>The board is aware of their role and responsibilities towards the estate and has the necessary skills to fulfil their role in managing the estate.</li> <li>You carry out the necessary due diligence when engaging a contractor.</li> <li>Continuity planning - You have a detailed continuity plan in place to cover any emergencies related to the estate including the relocation of pupils to another site if needed. Your continuity plan will also consider other emergencies including climate change and a breach of cyber security.</li> </ul> <p>For more detailed guidance see <a href="#">Planning and organising your estate resources</a>.</p>
<b>Understanding and managing your land and buildings</b>	<ul style="list-style-type: none"> <li>You assess all your land and buildings to understand how they are being used and whether they are being used effectively.</li> <li>You proactively respond to data collected through the up-to-date condition survey and in the Condition Data Collection programme by using it to inform asset management planning and prioritisation.</li> </ul> <p>For more detailed guidance see <a href="#">Understanding and managing your land and buildings</a>.</p>

Area	Activities
<b>Maintaining your estate</b>	<ul style="list-style-type: none"> <li>• You consider the balance between planned preventative management and reactive management.</li> <li>• You have a plan in place for the overall management and inspection of the estate. This could be embedded into your estate strategy and asset management plan. Estate management and inspection activities will also cover security arrangements you have in place.</li> </ul> <p>For more detailed guidance see <a href="#">Maintaining your estate</a>.</p>
<b>Health and safety</b>	<ul style="list-style-type: none"> <li>• The <a href="#">risk assessment register</a> is reviewed regularly by competent individuals.</li> <li>• All staff, where required, as specified in the <a href="#">Control of Asbestos Regulations 2012</a>, have received <a href="#">asbestos awareness training</a> in accordance with those regulations.</li> </ul> <p>For more detailed information see <a href="#">Health and safety</a>.</p>

## Level 3 – Fully effective

This covers all the things schools should have in place to manage their estate efficiently and effectively. This stage is in addition to the standards listed in stages 1 and 2.

Area	Activities
<b>Strategic estate management</b>	<ul style="list-style-type: none"> <li>You have regular strategic reviews scheduled.</li> </ul> <p>For more detailed guidance see <a href="#">Strategic estate management</a>.</p>
<b>Planning and organising your estate resources</b>	<ul style="list-style-type: none"> <li>Flood/storm - You use data from the Environment Agency to determine the flood risk from rivers, sea and surface water. You protect key assets and carry out essential maintenance and inspections to limit impacts. You also react and respond to media bulletins.</li> <li>Climate adaptation – You have plans in place to respond to events that may occur due to climate change such as overheating.</li> <li>Cyber – You have identified and documented cyber risks and have effective controls in place to prevent cyber-attacks. You have a plan in place to respond to cyber-attacks.</li> </ul> <p>For more detailed guidance see <a href="#">Planning and organising your estate resources</a>.</p>
<b>Understanding and managing your land and buildings</b>	<ul style="list-style-type: none"> <li>You use digital Building Information Modelling (BIM) to support your approach to effective estate management.</li> </ul> <p>For more detailed guidance see <a href="#">Understanding and managing your land and buildings</a>.</p>
<b>Sustainability</b>	<ul style="list-style-type: none"> <li>You take a whole-school approach to combat climate change which includes carbon reduction and nature recovery. There is a nominated sustainability lead.</li> </ul> <p>For more detailed guidance see <a href="#">Sustainability of your estate</a>.</p>
<b>Digital technology</b>	<ul style="list-style-type: none"> <li>You consider digital technology requirements as part of effective estate management.</li> </ul> <p>For more detailed guidance see <a href="#">Digital technology in your estate</a>.</p>
<b>Health and safety</b>	<ul style="list-style-type: none"> <li>Structural stability - you inspect buildings to check for damage.</li> </ul> <p>For more detailed guidance see <a href="#">Health and safety</a>.</p>

## Level 4 - Advanced

This is an opportunity for schools to become sector leaders in estate management. This stage is in addition to the standards listed in stages 1, 2 and 3.

Area	Activities
<b>Strategic estate management</b>	<ul style="list-style-type: none"> <li>The asset management plan and estate vision align with the budget management cycle.</li> </ul> <p>For more detailed guidance see <a href="#">Strategic estate management</a>.</p>
<b>Planning and organising your estate resources</b>	<ul style="list-style-type: none"> <li>You have a dedicated board member to oversee the effective management of the estate.</li> <li>You work closely with the school business professional to ensure the estate budget is represented in the overall budget planning cycle. This should draw on analysis of data, presented through the asset management plan and up-to-date building condition survey.</li> <li>You know the full cost of occupying the estate. You consider the revenue implications of any short-, medium- and long-term investment.</li> <li>You understand the performance of the estate and use it to challenge and demonstrate value for money.</li> </ul> <p>For more detailed guidance see <a href="#">Planning and organising your estate resources</a>.</p>
<b>Sustainability</b>	<ul style="list-style-type: none"> <li>The climate action plan is embedded into the estate vision and strategy. You have a robust plan in place to decarbonise the estate by national targets. You engage with the <a href="#">National Education Nature Park</a>.</li> </ul> <p>For more detailed guidance see <a href="#">Sustainability of your estate</a>.</p>
<b>Asbestos</b>	<ul style="list-style-type: none"> <li>You have updated the <a href="#">asbestos register</a> with photographs and material assessment scores and any new actions resulting from reinspection.</li> <li>You have carried out an emergency response exercise to test procedures in the event of accidental disturbance once staff have been <a href="#">trained</a> and provided with relevant site-specific information.</li> <li>You have subscribed to the free asbestos updates via <a href="#">eBulletin from HSE</a>.</li> </ul> <p>For more detailed guidance see <a href="#">Asbestos</a>.</p>

## Further reading

### Legislation

Schools must follow all the relevant regulation pertaining to their estate. The main legislation covering this is the [Health and Safety at Work etc. Act 1974](#) and its regulations. Under the act schools and their responsible bodies, as an employer, are responsible for the health and safety of their staff, pupils, and any visitors. They should follow the department's '[Health and Safety: responsibilities and duties for schools](#)' and the '[Health and Safety Executive \(HSE\) guidance for Education](#)'. Schools also have a duty to manage asbestos in their schools effectively, complying with the [Control of Asbestos Regulations 2012](#).

Other pieces of guidance and legislation responsible bodies should be aware of include:

- The law on workplace safety (HSE) - [The law on workplace safety - HSE](#)
- The role of school leaders - who does what (HSE) - [The role of school leaders - who does what - HSE](#)
- Occupiers Liability Act (HSWA Section 4) - [Occupiers' Liability Act 1957](#)
- Equality Act 2010: advice for schools - [Equality Act 2010: advice for schools - GOV.UK](#)
- Water Regulations - [The School Premises \(England\) Regulations 2012](#)
- Managing health and safety in construction (HSE) - [Construction \(Design and Management\) Regulations 2015](#)
- [The Building Safety Act - GOV.UK](#)
- If you occupy shared premises - [The Management of Health and Safety at Work Regulations 1999](#)

This isn't an exhaustive list, and schools will need to consider issues specific to them and their geographical location.

### Links to more information and guidance

- [Good estate management for schools](#)
- [Managing asbestos in your school or college](#)
- [Estate management competency framework](#)
- [Managing older school buildings](#)
- [Condition Data Collection \(CDC\)](#)
- [Net capacity assessment](#)
- [The Trust Network](#)
- [Academy trust handbook](#)
- [Maintained schools governance guide](#)
- [Risk protection arrangement](#)
- [School land transactions](#)



- [Sustainability and climate change strategy](#)
- [Help with climate action plans](#)
- [Get help buying for schools](#)
- [Digital technology standards](#)



Department  
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