Department for Education

School estate management annual return questions

The School Estate Management Standards annual return confirms how your responsible body meets the School Estate Management Standards.

To support responsible bodies in preparing to complete the return, this document provides advanced sight of the questions that will be asked.

This document should be read in conjunction with the information at School estate management standards annual return - GOV.UK.

Annual return questions

There are 6 sections in the annual return:

- Strategic estate management (6 questions)
- Planning and organising your estate resources (11 questions)
- Understanding and managing your land and buildings (7 questions)
- Maintaining your estate (2 questions)
- Sustainability (1 question)
- Digital technology (1 question)

The questions in each section relate to the corresponding area of the standards.

Strategic estate management

1. Does your organisation have an estate vision?

An estate vision is a high-level statement that describes the priorities of the estate and how the current and future education needs will be met. For more information, read the guide on strategic estate documents (opens in new tab) .

Answer options:

- Yes
- Not yet, but we are working on a first draft
- No
- I'm not sure

2. Does your organisation have an estate strategy which outlines investment plans for the next 3 to 5 years?

An estate strategy is a 3 to 5 year strategy that identifies what you need to do to achieve the estate vision, with outcomes and timescales. For more information, read the guide on strategic estate documents (opens in new tab) .

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Answer Options:

- Yes
- No, but less than 3 years of investment plans are outlined
- Not yet, but we are working on a first draft
- No
- I'm not sure

3. Does your organisation review the estate strategy at least once a year?

A review involves checking that the current progress, risks and priorities of your organisation are all reflected in the strategy. This review can be informal or a formal process involving trustees or a governing board.

Answer options:

- Yes
- No
- I'm not sure
- We do not have an estate strategy

4. What does your organisation's asset management plan include?

Asset management plans set out and prioritise actions to fulfil the estate strategy. The plan is the foundation for estate-related activities and responsibilities. Your plan might have a different name or be part of a larger strategic document.

Answer options (select all that apply):

- Actions to achieve the estate strategy
- Actions to maintain the estate
- Data about the estate
- None of the above
- I'm not sure; or
- We do not have an asset management plan

5. Does your organisation have a plan for climate action?

Climate action plans set out how your organisation will reduce environmental impact, decarbonise and adapt the estate to be resilient to climate change. Your plan might have a different name or be part of a larger strategic document. For more information, read the Sustainability leadership and climate action plans in education (opens in new tab).

Answer options:

- Yes
- Not yet, but we are working on a first draft
- No
- I'm not sure

6. Which climate goals are included in your organisation's plans?

Answer options (select all that apply):

- Build climate resilience
- Embed climate education and green skills into the curriculum
- Improve biodiversity and enhance nature and wildlife
- Reduce carbon emissions and work towards net zero
- None of the above
- I'm not sure
- We do not have any plans for climate action

Planning and organising your estate resources

1. Does your governing board have strategic oversight of the estate?

Strategic oversight includes regularly reviewing estate plans, monitoring risks and performance, making investment decisions and providing strategic direction.

Answer options:

- Yes, the governing board has strategic oversight
- Yes, the governing board has strategic oversight with support from a committee, estates lead or management team
- No
- I'm not sure
- We do not have a governing board

2. Does your governing board have estate management expertise?

Estate management expertise can include property management, facilities management or construction or building maintenance. Your governing board might get this expertise through external advisers, consultants or professional service providers.

Answer options:

- Yes, within the board
- Yes, through external providers
- No, but there is a nominated estates lead on the board
- No
- I'm not sure

3. Does your organisation have a named person responsible for estate management?

This person is often an estates lead, site manager or are part of a wider team which has estate management as part of its responsibilities.

Answer options:

- Yes, they are responsible only for estate management

- Yes, they lead or are part of a wider team
- No
- I’m not sure

4. What qualifications or experience does the person responsible for estate management have?

Answer options (select all that apply):

- Chartered Institute of Building (MCIOB or FCIOB)
- Facilities or estate management qualification or training
- Health and safety qualification, such as NEBOSH
- Institute of Workplace and Facilities Management (IWFM)
- Royal Institution of Chartered Surveyors (AssocRICS, MRICS or FRICS)
- Other qualification in estate management
- Practical experience in estate management
- None
- I’m not sure
- We do not have someone responsible for estate management

5. Does your organisation have continuity plans?

A continuity plan outlines how the organisation will continue to operate during estate-related emergencies and other long-term disruptions.

Answer options:

- Yes
- Not yet, but we are working on a first draft
- No
- I’m not sure

6. What do your organisation’s continuity plans cover?

Answer options (select all that apply):

- Cyber security incidents and breaches
- Estate-related emergencies, such as fire or flood
- Impacts of climate change
- Loss of critical utilities
- Relocation of pupils to another site if needed
- None of the above
- We do not have continuity plans

7. What does your organisation do to prepare for the impact of climate change?

Answer options (select all that apply):

- Have plans in place to respond to events such as overheating, flooding or water scarcity
- Carry out inspections and essential maintenance to limit the impact of climate change
- Use Environment Agency data to determine flood risk
- None of the above

8. How does your organisation prepare for cyber attacks or cyber security incidents?

A cyber security incident can include malware, phishing, unauthorised access or data breaches.

Answer options (select all that apply)

- Cyber risks are documented and reviewed
- Controls are in place to prevent or reduce the risk of cyber attacks
- There is a plan in place to respond to cyber attacks
- None of the above

9. When employing contractors, does your organisation carry out due diligence?

Due diligence includes confirming that contractors are competent, insured, financially stable, suitably qualified and able to carry out work safely and in line with legal requirements before they are appointed.

Answer options:

- Yes
- No
- I'm not sure

10. What best describes your organisation's estate-related budget forecasts?

Answer options (select all that apply)

- Based on realistic assumptions
- Reflect lessons learned from previous years
- Consider existing risk assessments
- None of the above
- We do not have estate-related budget forecasts

11. What does your organisation do when procuring goods and services for estate management?

Answer options (select all that apply)

- Assess value for money before awarding contracts
- Carry out checks on suppliers and contractors
- Follow documented procurement procedures
- Get competitive quotes or tenders for significant work
- Other
- None of the above
- I’m not sure
- We do not procure goods and services for estate management

Understanding and managing your land and buildings

Does your organisation use Condition data collection (CDC) data to plan and prioritise estate work?

The Condition data collection (CDC) programme collects data on the condition of buildings in every government-funded setting in England.

Answer options:

- Yes, we use CDC data when it is appropriate to do so
- No
- I’m not sure

2. Does your organisation use data from local condition surveys to plan and prioritise estate work?

Local condition surveys are ones that your organisation has commissioned. They do not include surveys from the Condition data collection (CDC) programme.

Answer options:

- Yes
- No
- I’m not sure

3. Have all settings in your organisation had local condition surveys in the last 5 years?

Settings include schools, nurseries and other education environments. If settings have recently joined or left, answer based on the settings currently in your organisation.

Answer options (for multi-setting users)

- Yes, all settings
- No, but more than half of settings
- No, but half or less of settings

- No, zero settings
- I'm not sure

Answer options (for single-setting users)

- Yes
- No
- I'm not sure

4. Which information does your organisation hold to manage the estate?

Answer options (select all that apply):

- Asset register
- Asbestos records (because asbestos does or might exist)
- No asbestos records (because the whole estate was built after the year 2000)
- Building layout plan
- Energy consumption data or CO_2 emissions
- Energy cost data
- Estate running cost information
- Information about building tenure, lease or ownership
- Statutory compliance record
- Sufficiency data, such as capacity and pupil numbers
- None of the above

5. Does your organisation know the terms under which it occupies the land and buildings?

Terms include whether land and buildings are owned or leased, and any conditions attached.

Answer options:

- Yes
- No
- I'm not sure

6. Which digital building management systems does your organisation use?

Digital building management systems are tools used to manage information about buildings, assets and maintenance. They do not include systems used only to control heating, ventilation, lighting or other building services.

Answer options (select all that apply):

- BIM (Building Information Modelling)
- CAFM (Computer-Aided Facility Management)
- Spreadsheets
- Other digital building management system
- We do not use any digital building management systems

7. Is your organisation a member of the DfE Risk Protection Arrangement (RPA) or does it have appropriate commercial insurance?

Having appropriate commercial insurance means that it is appropriate for the organisation's estate and activities. This would typically include cover for buildings, employer and public liability, and any other significant risks.

Answer options (select all that apply):

- Yes, we are a member of RPA
- Yes, we have commercial insurance
- No
- I’m not sure

Maintaining your estate

The wording of the questions is based on the ‘Maintaining your estate’ level descriptions in the School estate management standards. We are asking questions about levels 1 and 2 (there are no level 3 criteria).

1. Does your organisation have systems in place to ensure compliance with all legal health and safety requirements?

Areas for compliance include health and safety law, asbestos regulations, legionella, gas safety, fire safety, statutory inspections and risk assessments. For more information, read the GEMS health and safety guidance (opens in new tab).

Answer options:

- Yes
- Not yet, but we are working on this
- No
- I’m not sure

2. What does your organisation’s plan for the overall management and inspection of the estate include?

This plan might be part of your estate strategy, asset management plan or other strategic document.

Answer options (select all that apply):

- Checking the condition of the estate
- Checking the estate is working as intended
- Management of contractors working on site
- Monitoring and management of estate-related risks
- Preventative repairs and maintenance
- Security checks
- Site safety checks
- None of the above
- or

- We do not have a plan for the overall management and inspection of the estate

Sustainability

The wording of the questions is based on the 'Sustainability' level descriptions in the School estate management standards. We are asking questions about level 3 (there are no level 1 or 2 criteria).

1. Does your organisation have a nominated sustainability lead?

This person is responsible for leading sustainability or climate-related work.

Answer options:

- Yes
- No
- I'm not sure

Digital Technology

The wording of the questions is based on the 'Digital technology' level descriptions in the School estate management standards. We are asking questions about level 3 (there are no level 1 or 2 criteria).

1. Do the estate planning decisions of your organisation include digital infrastructure?

Digital infrastructure may include systems such as servers, network switching, data cabling, wifi, broadband, CCTV, access control or telecoms equipment.

Answer options:

- Yes
- No
- I'm not sure

Results and feedback page

After submitting their return, users can choose to view the levels of standards that their organisation is meeting. The results are based on the answers that they provided. They can also choose to give feedback and leave comments.

Table of results

This table will show the levels (with description text of what each level means) and which areas of the standards are being met at each level.

Result	Area of the standards
Level 1: Baseline The essentials that all organisations should have in place	Planning and organising your estate resources
Level 2: Transitioning Good estate management practices are in place	Strategic estate management Understanding and managing your land and buildings Maintaining your estate (level 2 is the highest possible level for this area of the standards
Level 3: Fully effective All elements needed for effective estate management are in place	Sustainability Digital technology
Level 4: Advanced Advances estate management practices	Not assessed by this annual return

Feedback questions

Users will be asked the following optional questions to with an opportunity to provide written feedback.

Do you agree with the results of your annual return

Answer options:

- Yes
- No

What stops your organisation from meeting the standards

Answer options:

- Challenges associated with the size or complexity of the estate
- Conflicting organisational priorities
- Difficulty accessing specialist advice or contractors
- Lack of available training or professional development for estate staff
- Lack of data or information about the estate
- Lack of estate management expertise
- Limited staff capacity or resources
- Uncertainty about how to meet the standards
- Other [text box to add details]