

WHAT GOOD LOOKS LIKE CHECKLIST

1. Condition & Asset Data

You'd expect to see:

- Recent condition surveys for all buildings (within last 3 years or sooner if known issues)
- Compliance records (e.g. fire, asbestos, legionella) up to date and stored accessibly
- FMR-formatted data for SCA/CIF bids
- Known risks prioritised and tracked
- Data reviewed annually and used to shape capital programmes

2. Strategic Alignment

Evidence of:

- Links to curriculum and school/trust improvement plans
- SEND provision reflected in estate layout/access
- Safeguarding needs influencing design and flow
- Forecasting of pupil numbers built into planning
- Estates strategy referenced in educational decision-making

3. Financial Planning

Good looks like:

- Phased, costed plan aligned to funding streams
- Lifecycle model used to predict spend and avoid sudden failures
- CIF/SCA/LA bid calendar built in
- Clear prioritisation based on condition + strategic need
- Contingency considered for urgent works

4. Stakeholder Engagement

You'd see:

- Site and estates staff input captured
- Consultation with SLT, SENDCo, business managers, governors
- Staff and pupil voice considered (especially in large-scale refurb projects)
- Estates team understand strategic goals; leaders understand site constraints
- Ownership of actions assigned

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5. Review & Governance

Looks like:

- Annual formal review (or post-capital project update)
- Presented to SLT and Board (or GB) at least annually
- Built into risk register or assurance framework
- Actions monitored and tracked over time
- Updated based on funding outcomes or organisational change

How to Prioritise If You Scored Low in Multiple Areas:

- ✓ Start where the **risk** is highest — e.g. poor compliance data = urgent
- ✓ Or where there's the **most impact** — e.g. align estates to a major curriculum or growth decision
- ✓ Don't try to fix everything — pick **one priority area** to improve first and build from there

If multiple areas score low, prioritise by:

1. Risk to safety or operations
2. Impact on educational or strategic outcomes
3. Ability to make and monitor good decisions
4. Enablers that strengthen long-term planning

If you've got a few 1s or 2s, don't feel like you need to fix everything at once.

- Start where the risk is highest, usually, condition or compliance
- Then look at what's driving your biggest decisions, if your strategy isn't aligned with your curriculum, that's a slow-burning problem.
- From there, you can build outward and bring in the enablers like engagement and financial phasing.