



Estate Vision & Strategy

Approved by: Trust Board

Last reviewed: July 2026

Next review due: July 2027

ESTATE VISION & STRATEGY

This policy is written and approved at board level, but applies to all employees of schools, settings, and services, hereafter the 'organisations,' within The Claxton Trust.

It has been created using the DfE (Department for Education) Good Estate Management for Schools (GEMS) self-assessment tool and online resources.

Estate Vision

1. Introduction

The vision for our estate is rooted in the core values that underpin our trust:

- inspiration
- collaboration
- inclusion
- resilience

2. Our vision

The agreed vision for our estate is:

- we will fulfil our responsibilities for compliance and protect the safeguarding, health, and safety of everyone who uses our estate
- we will ensure that, primarily, our estate supports the delivery of our curriculum and ensures the best outcomes for learners
- we will make our estate inclusive, and provide equal opportunities and access for all members of our community, including those with protected characteristics
- our estate resources will be shared for the common good, based on collaboration between our schools, setting and services, not competition
- we will be financially disciplined and spending on our estate is prioritised within the financial constraints we work within
- we see all our schools, setting and services as equal partners
- we see our estate as a community asset, and will make it available for the provision of recreation, sporting, or other leisure time activities for our community whenever we can, aiming to make this financially viable, and accessible to all
- we will always consider the long term, ensuring our estate is available for generations to come

Estate Strategy

3. Purpose

The estate strategy describes the estate we currently oversee; our goals and current objectives; and specific issues for consideration.

4. The estate

The Claxton Trust is a multi-academy trust based in Stevenage, comprising of two primary schools.

Camps Hill Primary School is a two-form entry school for ages 2-11, with a preschool provision on site. The estate includes one building constructed in 1957 and two demountable structures built in 1990s but refurbished in 2016.

Fairlands Primary School is a three-form entry school for ages 3-11, with a privately managed preschool on site. The estate includes four separate buildings across two sites which are separated by a public footpath. The upper building was constructed in 1951; the lower building was constructed in 1957; and the two remaining buildings were added in 2012.

5. Goals and objectives

In the next 3 to 5 years:

- we will ensure our existing estate is safe, warm, and dry to deliver education
- we will explore opportunities to grow our estate in line with our growth strategy
- we will ensure all growth opportunities are subject to rigorous due diligence to ensure the long-term viability of our estate

6. Options for consideration

I. Size of school

The trust does not prefer schools to be of a suitable size but is clear that provision needs to be viable over the long term.

In the interests of providing the highest quality of education, we have a preference to work towards buildings that accommodate consistent numbers of forms of entry.

We will collaborate closely with local authorities in the areas in which we operate and beyond, to respond to pressures on pupil places. This includes working to open new schools where there is a proven need for places and expand our existing schools to meet need, with capital support from local authorities and the DfE to do so.

II. Delivery of school curriculum

New building and re-configuration to support the needs of the curriculum is supported on the basis that the curriculum itself is deliverable and financially sustainable over the long term. We will take advice on the DfE recommended school sizes to deliver an acceptable curriculum and acknowledge that at the present time there is no earmarked funding available for expansion or re-configuration to meet curriculum needs alone.

III. Suitability

We acknowledge that having an attractive and appealing estate results in pupils wishing to attend our schools and our staff having a comfortable and functional place in which to work. We will also consider suitability when planning remodelling or expansion of our estate, choosing to make crucial adjustments to improve the attractiveness and appeal of the estate where this is practical and affordable.

IV. Standard of Work

When conducting expansion or refurbishment work our aim is to ensure the work is fit for purpose and has a long lifespan, meeting all building and other regulations. We will appoint project managers to manage medium to large projects where we do not have the level of expertise required within the trust.

V. Insurance

The trust will hold sufficient insurance from a reputable company to protect us against the risk of severe damage to our buildings. At present the Risk Protection Arrangement (RPA) provided by the DfE is considered to meet our needs in this respect.

VI. Compliance

We will conduct the following actions to make sure we are compliant with all legal and other requirements:

- Regular compliance checks in school-by-school staff which are tailored to the needs of the individual school's estate. These are recorded in our estate compliance system
- Regular compliance checks in school are conducted by a competent contractor, where legislation or Policy requires this. These are recorded in our estate compliance system.
- Regular audits of compliance conducted either internally or externally and recorded in our estate compliance system.
- Reporting of compliance to be considered by the Board of Trustees, at local Governing Body and by the head teacher and/or business manager of each school

In the event non-compliance is identified, an action plan is put in place to return our estate to full compliance.

VII. Condition

Funding that the trust receives to tackle condition issues (currently the School Condition Allocation) will be spent by prioritising those condition issues that have the greatest risk to prevent us using our estate for the delivery of education. This will be achieved by targeting those with the worst condition (D or C) and the greatest potential impact.

To prioritise effectively and to allow us to bid for money when the opportunity arises, the trust will commission comprehensive consistent condition surveys across the estate on a 5-year rolling basis. Surveys will be shared with school staff and governors.

Where condition issues exist that are not being tackled using the trust grant, the devolved formula capital allocation to each school must be used where practical to resolve the most serious issues.

In some cases, condition issues may be so severe and funding so limited that the agreed course of action is either not to use the affected building or to strategically manage the condition until an opportunity arises to replace.

VIII. Preventative maintenance

We will rigorously identify, plan, and conduct preventative maintenance (e.g.: servicing, repainting) to ensure our estate assets have the longest possible useful life. This is monitored internally, through a termly health and safety audit and GEMS planning review, and externally through activity such as the Condition Data Collection and local authority estate reviews.

IX. Value for Money

When procuring works to our estate we always use the trust procurement policy to achieve value for money. We will grasp opportunities to conduct work efficiently (e.g.: to do more than one thing when scaffolding is in place) or tackle a long-held aspiration when a grant becomes available. We will also consider not doing works where they have a limited lifespan or do not fit into the longer-term plans for our estate.

We procure collaboratively to achieve economies of scale when buying goods and services required across our estate. This will ensure consistency as well as limiting the cost to individual schools.

X. Training

All our staff will receive appropriate health and safety training related to the estate. Staff with specific responsibilities for managing the trust estate will receive access to targeted appropriate training.

XI. Accessibility

Our estate should be accessible to pupils, staff, and members of the community. We will make reasonable adjustments to our estate to provide for the needs of our pupils and staff as they arise.

We will also consider accessibility when planning remodelling or expansion of our estate, choosing to make crucial adjustments to improve accessibility where this is practical and affordable.

XII. Sustainability

When considering any remodelling or expansion to our estate we will consider whether it is sustainable in terms of maintenance and replacement over time, considering any potential income generation opportunities or revenue cost (e.g.: to heat and clean). A challenging option appraisal process is undertaken to ensure that the balance between capital and revenue spend is maintained.

XIII. Income generation

We aim to be bold when considering opportunities to invest to both fulfil our objective of the provision of leisure facilities and income generation to support the running of the school. We aim to take advantage of opportunities to access grants and therefore to be able to conduct projects which impact beneficially on our community. We always put together a business plan to analyse these opportunities and ensure they are sustainable in the longer term.

XIV. Tenure

We understand the legal basis on which we hold our estate and receive relevant permissions from our ultimate landlord were applicable.

XV. Disposal of our estate

When there is an opportunity to dispose of our estate (either by sale or by leasing a building to an external organisation), we will:

- have a business case for investing the proceeds of the disposal that achieves our trust objectives over the longer term
- ensure all legal and regulatory conditions are complied with, including obtaining permission from the DfE, planning, rates, etc
- consider any safeguarding implications
- ensure any lease is drawn up by a legal professional
- consider and determine whether the organisation or purpose which benefits from the disposal is in line with our ethos and values.

XVI. Energy Efficiency

We aspire to improve energy efficiency across our estate, provided the initiatives bring both environmental and financial benefits to the trust. We are prepared to borrow money (in a compliant manner) to conduct these initiatives. The financial benefits of the initiatives would go to the school where the school bears the capital cost, but to the trust where the school provides the capital. In this way all schools can benefit from the use of trust reserves and the trust estate.

We are aware that energy efficiency is about more than just energy generation (e.g.: solar, wind) but about having efficient boilers, roofing, windows, etc and most importantly of all, encouraging energy efficient behaviours.

The trust central staff will purchase energy (gas & electricity) on behalf of the trust estate to achieve economies of scale.

XVII. Funding and Probity

We will comply with any conditions and reporting requirements imposed on us because of receiving grant funding for estate improvement or expansion.

XVIII. Business Continuity

We will have business continuity plans in place at a trust and individual school level to protect us in the eventuality of not having access to part of our estate.

XIX. Impact of works on our estate

We carefully consider the impact of the process of conducting works on our estate, particularly the impact on the education provision while the works are going on. We always prioritise health and safety, ensuring our pupils and staff are not put at risk by the building works. Works are planned logically to minimise disruption to day-to-day operations.

XX. Collaboration

We make use of our estate for the benefit of all pupils and staff in the trust, willingly stepping in to help when the need arises.

7. Formal review and approval

The vision and strategy are subject to annual review and approval by the board of the trust, in line with our agreed schedule of policy review.