

Your DfE-aligned Estate Assessment Results

Northgate Academy Trust · Mike Atherton · 4 September 2026

D

51% overall

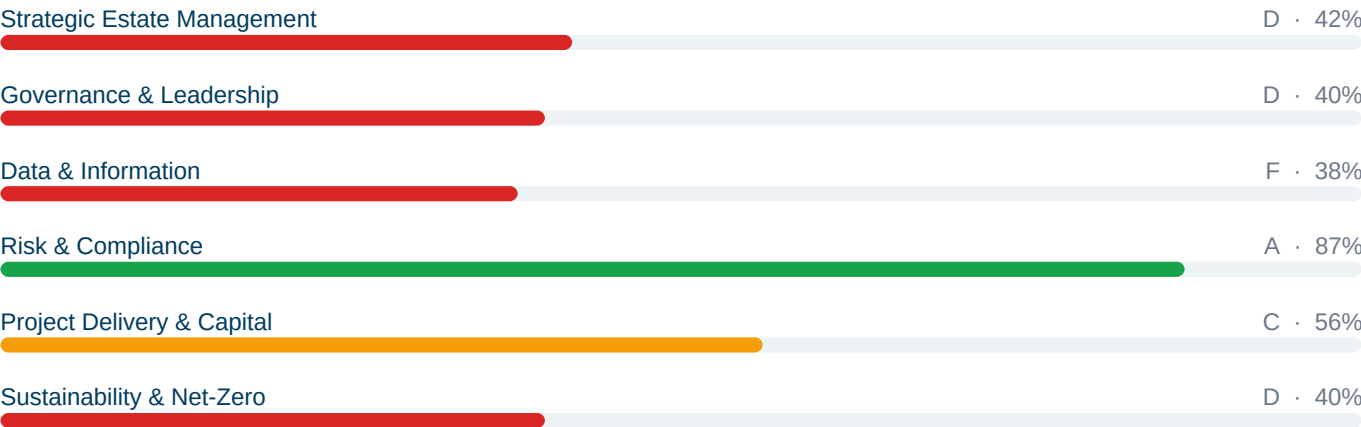
Below Level 1

Your average score is 51%, but Data & Information is sitting at Below Level 1. The DfE's School Estate Management Standards expect every area to reach a level before an organisation can claim it overall, so Data & Information is currently setting the ceiling. Closing that gap is the single biggest unlock to a higher overall rating.

CRITICAL COMPLIANCE FLAGS (1)

- Estate insurance position unclear

Your six pillar scores at a glance



Pillar breakdown

How each pillar scores, with the top priorities to act on first.

Strategic Estate Management

D · 42% · Level 1: Baseline

1. [Project] Develop a documented estate vision

The DfE expects every Responsible Body at SEMS Level 1 to have a clear estate vision setting out how your buildings and grounds support your educational outcomes. Building Spatial Intelligence offers a tool that uses your self-assessment results as the starting point to help you build an estate vision document; book a free consultation to see it in action.

[Book a free consultation >](#)

GEMS: Strategic estate management on GOV.UK >

2. [Project] Develop a current estate strategy

An estate strategy translates your vision into a multi-year investment and maintenance roadmap; the DfE expects this at SEMS Level 1 as the link between educational ambition and the physical estate. Building Spatial Intelligence offers a tool that uses your self-assessment results as the starting point to help you build a strategy document; book a free consultation to see it in action.

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3. [Project] Build a data-led asset management plan

An asset management plan sets out how you'll maintain, invest in and renew your estate over a 3-5 year horizon, and depends on a current asset register, condition survey data and statutory compliance information. Building Spatial Intelligence can help with the data foundation that the AMP is built on; the plan itself is typically authored by your estates lead or an estates consultant.

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4. [Project] Extend your estate strategy's planning horizon to at least 3-5 years

Short-horizon planning leaves you reactive to condition and capacity changes, and undermines credibility with funders; the DfE expects Level 1 organisations to plan investment and renewal over at least a 3-5 year horizon. Engage your finance team to align medium-term financial planning with the estate strategy and re-issue documents with the extended horizon.

GEMS: Strategic estate management on GOV.UK >

5. [Quick win] Strengthen the basis of your estate budget forecasts

The annual return asks whether your estate-related budget forecasts are based on realistic assumptions, reflect lessons learned from previous years, and take existing risk assessments into account. Most forecasts satisfy the first and miss the other two. Work with your finance team to write the prior-year variance review and the risk-assessment inputs into your forecasting cycle.

GEMS: Planning your estate resources on GOV.UK >

6. [Quick win] Establish a formal strategic review cycle

A regular (ideally annual) strategic review of estate performance keeps your vision, strategy and AMP current and demonstrates SEMS Level 3 (Fully Effective) practice. Add a standing review item to your governance calendar with a clear template covering condition, compliance, sufficiency, sustainability and financial performance.

GEMS: Strategic estate management on GOV.UK >

7. [Quick win] Get your estate strategy formally approved

Formal board or trustee approval of the estate strategy is a Level 1 baseline expectation under the DfE's Estate Management Standards and signals that estate decisions have institutional backing. Add the strategy to your next board agenda for ratification and minute the decision. If your strategy is outdated or you need help building one, Building Spatial Intelligence offers a tool that uses your self-assessment as the starting point; book a free consultation to see it in action.

Book a free consultation >

[School Estate Management Standards on GOV.UK >](#)

8. [Quick win] Get your asset management plan formally approved

Formal board or trustee approval of the AMP is a Level 1 baseline expectation under the DfE's Estate Management Standards and unlocks the resource decisions that flow from it. Add the AMP to your next board agenda for ratification and minute the decision.

[School Estate Management Standards on GOV.UK >](#)

9. [Project] Explicitly link your estate strategy to your educational vision

Without a documented thread between estate decisions and educational priorities (curriculum, SEND provision, nursery and post-16 expansion), capital and maintenance choices drift; the DfE expects this alignment at SEMS Level 1. Review your strategy alongside your current school improvement plan or trust development plan and write the explicit connections into the strategy document.

[GEMS: Strategic estate management on GOV.UK >](#)

10. [Project] Link your estate strategy into your budget planning cycle

Without a documented connection between estate priorities and annual or multi-year budgets, you risk under-funding critical compliance and condition work; the DfE explicitly expects this linkage. Embed an estate budget review as a standing item in your finance committee and align the AMP's investment profile with your medium-term financial plan.

[GEMS: Planning your estate resources on GOV.UK >](#)

Governance & Leadership

D · 40% · Level 1: Baseline

1. [Quick win] Establish board-level strategic oversight of the estate

The DfE annual return asks directly whether your governing board has strategic oversight, regularly reviewing estate plans, monitoring risks and performance, making investment decisions and setting direction. Oversight held with support from a committee or estates lead counts fully. Put a standing estates item on the board agenda, agree who prepares it, and minute the decisions that follow.

[GEMS: Planning your estate resources on GOV.UK >](#)

2. [Quick win] Name the individual(s) responsible for day-to-day estate management

The DfE expects every Responsible Body to have a clear day-to-day owner of estate management at operational level, separate from the senior leader who is strategically accountable. Identify the right person (typically a school business professional, estates manager or premises lead), document the responsibility, and ensure they have the time and authority to do the role.

[GEMS: Planning your estate resources on GOV.UK >](#)

3. [Project] Secure estate management expertise for your board

The annual return asks whether your board has property, facilities, construction or maintenance expertise, and where it comes from, internal or external both count. If neither is in place, either recruit a trustee with a built-environment background or retain an adviser on a defined brief, and record the arrangement in your governance documents.

[Estate Management Competency Framework on GOV.UK >](#)

4. [Quick win] Schedule routine board review of estate performance

Boards that review estate performance at least termly are better placed to challenge, prioritise and resource estate work; less frequent review tends to mean estate issues only surface in a crisis. Add a standing "Estate" item to your board agenda with a brief written update covering condition, compliance, capacity and capital programme status.

[School Estate Management Standards on GOV.UK >](#)

5. [Project] Build the professional capability of your estates lead

The annual return asks what qualifications and experience your estates lead holds, RICS, CIOB, IWFM, a facilities or estate management qualification, or NEBOSH. Practical experience alone is recorded but sits lowest. Map your lead against the Estate Management Competency Framework, identify the gap, and fund the training or bring in specialist support to cover it.

[Estate Management Competency Framework on GOV.UK >](#)

6. [Project] Adopt the DfE's Estate Management Competency Framework

The framework defines the skills, qualifications and continuing professional development expected of estate managers at different role levels; applying it gives you a defensible structure for recruitment, performance review and CPD investment. Map the framework against your current estate-related roles, identify gaps, and build the CPD response into your annual cycle.

[Estate Management Competency Framework on GOV.UK >](#)

7. [Project] Make estate-focused training a standing requirement for governors and trustees

Without baseline estate-management training, board members can't credibly hold the executive to account on capital, compliance or condition decisions; mandatory or strongly encouraged training closes this exposure. The National Governance Association and Confederation of School Trusts both offer targeted estate-themed training, and the DfE's Competency Framework gives you a structure to map it against.

[Estate Management Competency Framework on GOV.UK >](#)

[National Governance Association >](#)

[Confederation of School Trusts >](#)

8. [Quick win] Document key estate decisions in board minutes

Routine minuting of estate decisions provides an audit trail for funders, inspectors and successors, and demonstrates the board's role in estate stewardship; SEMS Level 1 expects this. Brief your clerk to capture estate decisions explicitly, including the reasoning, financial envelope, and accountable individual, and review the minute template at the start of each governance cycle.

[School Estate Management Standards on GOV.UK >](#)

9. [Project] Build the information and expertise base for confident estate decisions

Low leadership confidence on estate decisions typically reflects gaps in either the data your team has access to, or the expertise to interpret it. Invest in CPD mapped to the DfE's Competency Framework and audit the estate data flowing to your board; Building Spatial Intelligence can help with the data side, book a free consultation to see how.

[Book a free consultation >](#)

[Estate Management Competency Framework on GOV.UK >](#)

Data & Information

F · 38% · Below Level 1

Capping your overall level. Closing this gap is the unlock to a higher overall rating.

1. [Project] Build a comprehensive digital asset register

A modern asset register captures every site, building and major plant item with location, condition, age, replacement cost and statutory inspection cycles, organised into a structured format that becomes the foundation of every other estate decision. Building Spatial Intelligence can help with this.

[Book a free consultation >](#)

GEMS: Land and buildings on GOV.UK >

2. [Programme] Get a local condition survey into every setting

The annual return asks whether every setting in your organisation has had a local condition survey in the last 5 years, and records the proportion if not. Partial coverage weakens both your asset management plan and any funding bid. Build a rolling survey programme that reaches every site inside a 5-year cycle, prioritising the settings with the oldest or missing data.

[Book a free consultation >](#)

GEMS: Land and buildings on GOV.UK >

3. [Quick win] Use your Condition Data Collection data to set priorities

The annual return no longer asks only whether you have seen your CDC report, it asks whether you use CDC data to plan and prioritise estate work. Request the report via your DfE account, then reflect its priority condition findings explicitly in your maintenance and capital plans so the link is evidenced; Building Spatial Intelligence can help interpret the data.

[Book a free consultation >](#)

DfE Condition Data Collection programme on GOV.UK >

4. [Project] Build a digital statutory compliance register

A compliance register tracks every regulated asset (fire systems, asbestos, legionella, gas, electrical, lifts, pressure systems) with its inspection cycle, last and next inspection dates, responsible person and certification status, all in one accessible record. Building Spatial Intelligence can help structure the register, though a competent inspector is still needed for the actual statutory checks.

[Book a free consultation >](#)

GEMS: Health and safety on GOV.UK >

5. [Project] Build a complete digital tenure and title register

Without complete records of leases, freeholds, easements, rights of way and shared-use agreements, you can't safely make capital decisions, dispose of surplus space or respond to planning challenges. Engage your legal team or a property specialist to compile, verify and digitise these records.

GEMS: Land and buildings on GOV.UK >

6. [Project] Bring digital infrastructure into your estate planning decisions

Digital technology is one of only two areas the annual return assesses at Level 3, and it asks a single question: do your estate planning decisions include digital infrastructure, servers, network switching, data cabling, wifi, broadband, CCTV, access control, telecoms. Add a digital infrastructure section to your estate strategy and require it to be considered in every capital scheme and refurbishment.

[Book a free consultation >](#)

School Estate Management Standards on GOV.UK >

7. [Programme] Move from ad hoc tools to a single source of truth

Spreadsheets and folder-based filing don't scale beyond a single school; a CAFM helpdesk system, a bespoke database, or an estates GIS gives you query-ability, audit trail and reporting that the DfE's data direction increasingly assumes you'll have. Building Spatial Intelligence can help you implement a fully integrated dashboard across your entire estate.

[Learn more about our facility management solutions >](#)

School Estate Management Standards on GOV.UK >

8. [Programme] Bring Building Information Modelling into operational use

The SEMS Level 3 standard expects digital BIM to support estate management; newer schools typically have a BIM model from handover, while older buildings need a retrospective BIM built from a 3D scan. Building Spatial Intelligence can build a retrospective BIM for schools that don't have one, or update an existing model that has fallen out of date.

[Learn more about our BIM services >](#)

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[School Estate Management Standards on GOV.UK >](#)

9. [Project] Get your data ready for funding applications

Without a credible, query-able data position, Responsible Bodies risk dropping down the queue for the Renewal and Retrofit Programme, capital maintenance allocations, and the replacement for the Condition Improvement Fund. Building Spatial Intelligence can help you build that data position.

[Book a free consultation >](#)

[DfE Education Estates Strategy on GOV.UK >](#)

10. [Project] Prepare for the DfE annual return on Estate Management Standards

The annual return requires Responsible Bodies to evidence Level 1 compliance across condition, compliance, planning and skills, and the data demands of this return will scale up over the coming years. Building Spatial Intelligence can help with the data and evidence side.

[Book a free consultation >](#)

[School Estate Management Standards on GOV.UK >](#)

11. [Project] Capture all five building area types

Site Area, GEA, GIA, GIFA and TUFA each serve a different purpose: insurance valuations, capacity assessments, utilisation studies and funding bids all rely on having them correctly measured and held in structured form. Building Spatial Intelligence can help with this.

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[GEMS: Land and buildings on GOV.UK >](#)

12. [Quick win] Capture energy cost, running cost and sufficiency data

The annual return lists energy cost data, estate running cost information and sufficiency data (capacity and pupil numbers) among the information a Responsible Body should hold. These are usually already inside finance and census systems but never brought together against the estate. Pull them into one place alongside your asset register so cost per m² and capacity utilisation become visible.

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[GEMS: Land and buildings on GOV.UK >](#)

13. [Project] Set up structured energy, water and carbon data capture

Tracking utilities at the meter level (ideally half-hourly), combining it with floor-area and degree-day data and reporting on it monthly, is the foundation of both sustainability decisions and accurate utility budgeting. Building Spatial Intelligence can help establish the data structure and reporting.

[Book a free consultation >](#)

[GEMS: Sustainability of your estate on GOV.UK >](#)

14. [Project] Get current, scaled digital floor plans

Current, scaled digital floor plans are the foundation of space utilisation analysis, fire safety planning, accessibility audits and capacity assessments. Building Spatial Intelligence creates floor plans from a full 3D scan that can be uplifted to a 3D BIM model when you're ready.

[Learn more about our CAD plans service >](#)

[GEMS: Land and buildings on GOV.UK >](#)

15. [Programme] Restructure your estate data against the DfE-aligned common dataset

Ad hoc spreadsheets and inconsistent naming conventions are the silent killer of estate decision-making; a standard, DfE-aligned, common dataset across asset, condition, compliance, energy and tenure data unlocks query-ability, reporting and funding-bid readiness. Building Spatial Intelligence can help with this.

[Read our guide to the minimum viable dataset >](#)

[School Estate Management Standards on GOV.UK >](#)

16. [Project] Establish baseline estate data to reach SEMS Level 1

Routinely using estate data to inform decisions requires Level 1 (Baseline) data under the DfE's School Estate Management Standards: condition, compliance, planning and skills foundations that the rest of the framework builds on. Building Spatial Intelligence can help you establish this baseline data.

[Book a free consultation >](#)

[School Estate Management Standards on GOV.UK >](#)

Risk & Compliance**A · 87% · Level 3: Fully Effective****1. [Quick win] Complete asbestos awareness training for relevant staff**

Under the Control of Asbestos Regulations 2012, any staff whose work could disturb asbestos-containing materials (caretakers, maintenance, contractors, design teams) must have asbestos awareness training, refreshed annually. Use a UKATA-approved provider for compliant training delivered either online or face-to-face.

[HSE: Asbestos training on GOV.UK >](#)

2. [Quick win] Confirm your estate insurance position

Schools can use the DfE Risk Protection Arrangement (RPA), commercial insurance, or a combination; each has different scope and exclusions, and 'not sure' leaves you exposed. Review your current arrangement against your asset register and reinstatement values, and confirm with your broker or the RPA helpline that you have appropriate cover.

[DfE: Risk Protection Arrangement on GOV.UK >](#)

3. [Project] Widen what your continuity plans cover

The annual return asks specifically whether your continuity plans cover estate emergencies such as fire or flood, loss of critical utilities, cyber incidents, the impacts of climate change, and relocating pupils to another site. Loss of utilities and pupil relocation are the two most commonly missing. Review your plan against all five and add the scenarios you have not yet written up.

[GEMS: Planning your estate resources on GOV.UK >](#)

Project Delivery & Capital**C · 56% · Level 1: Baseline****1. [Quick win] Formalise contractor due diligence before appointment**

The annual return asks a standalone question on due diligence: confirming before appointment that contractors are competent, insured, financially stable, suitably qualified and able to work safely and lawfully. Build a short pre-appointment checklist covering all five, require it for every contractor engagement, and retain the evidence, it is the record an inspection or insurer will ask for.

[GEMS: Planning your estate resources on GOV.UK >](#)

2. [Project] Develop a phased backlog reduction plan

A material maintenance backlog indicates accumulated deferred work that grows more expensive the longer it sits, and the DfE expects Responsible Bodies to know their backlog accurately and have a credible plan to reduce it. Triage by risk and statutory compliance, sequence the work over a 2-5 year horizon against likely funding streams, and link the plan into your AMP and budget cycle; Building Spatial Intelligence can help quantify the backlog from your condition data.

Book a free consultation >

GEMS: Maintaining your estate on GOV.UK >

3. [Quick win] Close the gaps in your estate procurement practice

The annual return asks what you actually do when procuring: follow documented procedures, assess value for money before award, get competitive quotes or tenders for significant work, and check suppliers and contractors. All four are expected. Document your thresholds, frameworks and evaluation criteria, and reference Crown Commercial Service frameworks where they apply.

GEMS: Planning your estate resources on GOV.UK >

4. [Project] Complete your estate management and inspection plan

The annual return asks what your plan for the overall management and inspection of the estate includes, listing condition checks, checking the estate works as intended, preventative maintenance, risk monitoring, on-site contractor management, site safety checks and security checks. Security and site safety checks are the two most often absent from otherwise solid plans. Audit yours against all seven and add what is missing.

GEMS: Maintaining your estate on GOV.UK >

5. [Project] Build a prioritised maintenance plan from your latest condition data

The DfE expects every Responsible Body at SEMs Level 1 to hold a prioritised maintenance plan that translates condition data into a sequenced work programme, with budgeted costs and clear ownership. Building Spatial Intelligence can help build the data foundation that the plan sits on; the plan itself is typically authored by your estates lead with input from your maintenance contractors.

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GEMS: Maintaining your estate on GOV.UK >

6. [Project] Shift the balance from reactive to planned maintenance

Reactive-heavy maintenance regimes are routinely 1.5 to 2 times more expensive per pound of work than planned regimes, and tend to mean compliance work happens late; the DfE expects Responsible Bodies at Level 2 (Transitioning) to demonstrate this balance. Audit your last 12 months of work orders, map them against your condition data, and shift routine items into a forward-planned schedule.

GEMS: Maintaining your estate on GOV.UK >

7. [Quick win] Adopt a formal option appraisal process for capital decisions

Without a structured option appraisal, capital decisions get made on hunch or politics; the DfE expects Level 1 Responsible Bodies to demonstrate a robust appraisal process that compares options on cost, risk, educational benefit and whole-life implications. Use a structured template that captures these factors and apply it consistently to all capital decisions above your threshold; GEMS guidance includes examples appropriate for school settings.

GEMS: Managing your estate projects on GOV.UK >

8. [Project] Embed whole-life costing in capital decisions

Capital decisions made on capex alone consistently underestimate true cost; the DfE expects Level 4 Responsible Bodies to consider running, maintenance, disposal and revenue costs alongside the initial build. Engage your finance team and estates lead to build a simple whole-life cost template, and apply it to every capital business case above your threshold.

GEMS: Managing your estate projects on GOV.UK >

9. [Quick win] Engage with the DfE's Renewal and Retrofit Programme

The Renewal and Retrofit Programme is the DfE's flagship funding stream for tackling poor condition and improving climate resilience, with significant capital being deployed over the coming years; eligible Responsible Bodies should be actively engaging. Read the latest DfE guidance, identify candidate buildings on your estate, and ensure your data position can support an application; Building Spatial Intelligence can help with the data side.

Book a free consultation >

DfE Education Estates Strategy on GOV.UK >

10. [Quick win] Run post-project reviews on capital work

Without a structured post-project review, the same procurement, design and contractor mistakes recur on every project; the DfE expects Level 4 Responsible Bodies to track project outcomes and demonstrate value for money. Run a brief post-project review 3-6 months after each completion covering budget, schedule, defects, contractor performance and lessons learned, and feed the findings into your next procurement.

GEMS: Managing your estate projects on GOV.UK >

11. [Quick win] Prepare for the forthcoming Condition Improvement Fund replacement

The DfE has signalled a replacement for the Condition Improvement Fund as part of its 10-Year Estates Strategy, with a stronger emphasis on data-backed allocation and condition-led prioritisation; eligible Responsible Bodies should be tracking the consultation now. Read the latest DfE guidance, anticipate what the new application process will need, and ensure your condition and asset data are ready; Building Spatial Intelligence can help with the data side.

Book a free consultation >

DfE Education Estates Strategy on GOV.UK >

Sustainability & Net-Zero**D · 40% · Level 1: Baseline****1. [Project] Develop a climate action plan for your estate**

The DfE expects every state-funded school in England to have a climate action plan in place, covering decarbonisation, climate adaptation, biodiversity and pupil engagement, with completion targeted by 2025. Building Spatial Intelligence can help with the data foundation (energy use, building fabric, asset data); the plan itself is typically led by a sustainability lead or external sustainability consultant.

Book a free consultation >

DfE Sustainability and Climate Change Strategy on GOV.UK >

2. [Quick win] Nominate a sustainability lead

The DfE's Sustainability and Climate Change Strategy expects every education setting to have a nominated sustainability lead by 2025, with the role embedded into your structure (often a senior leader, trustee, or trained school business professional). Define the role in writing, allocate time, and link it into your governance cycle.

DfE Sustainability and Climate Change Strategy on GOV.UK >

3. [Project] Build the data infrastructure for sustainability decisions

Tracking energy use, water use, carbon emissions and waste at a frequency that informs decisions (typically monthly or better) is the foundation of every other sustainability action; without it, you are guessing about progress. Building Spatial Intelligence can help establish the data capture, structuring and reporting that makes sustainability decisions evidence-based.

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GEMS: Sustainability of your estate on GOV.UK >

4. [Quick win] Engage with national sustainability programmes for schools

The DfE and partner organisations support schools through several national programmes, each offering funding, training or expert support; sign up to the ones relevant to your priorities.

- [Sustainability Support Programme](#)
- [National Education Nature Park](#)
- [Climate Ambassadors](#)
- [Great British Energy Solar Partnership \(GBESP\)](#)
- [Let's Go Zero campaign](#)

[DfE Sustainability and Climate Change Strategy on GOV.UK >](#)

5. [Project] Evidence how you prepare for climate impact

The annual return asks three things: plans to respond to overheating, flooding or water scarcity; inspections and essential maintenance carried out to limit climate impact; and use of Environment Agency data to determine flood risk. The Environment Agency check is free and takes minutes per site, run it, record the result, and connect the findings to your maintenance programme.

[GEMS: Sustainability of your estate on GOV.UK >](#)

6. [Project] Cover all four climate goals in your plans

The annual return asks which climate goals your plans include: reducing carbon emissions towards net zero, building climate resilience, improving biodiversity and enhancing nature and wildlife, and embedding climate education and green skills into the curriculum. Biodiversity is the goal most often missing entirely. Review your climate action plan against all four and write in the ones you have not addressed.

[DfE Sustainability and Climate Change Strategy on GOV.UK >](#)

7. [Project] Assess flood risk and put mitigation in place

Flooding from surface water, rivers, sea and rising groundwater is increasingly a concern as UK rainfall patterns shift; the DfE's 10-Year Estates Strategy explicitly calls out flood resilience as a Level 3 expectation. Check each site against the Environment Agency's flood risk maps, commission a site-specific flood risk assessment for any high-risk sites, and document mitigation in your business continuity plan.

[GEMS: Sustainability of your estate on GOV.UK >](#)

[Environment Agency flood risk maps >](#)

8. [Project] Assess overheating risk and identify adaptation measures

Building overheating is a growing risk as UK summers warm, with serious implications for pupil wellbeing and academic performance; the DfE's 10-Year Estates Strategy explicitly calls out climate adaptation. Engage a qualified building services or sustainability engineer to assess each site against industry overheating criteria and identify adaptation measures; Building Spatial Intelligence can deploy multi-sensors across your estate to monitor temperature, CO2, humidity and pressure as live data in your BIM dashboards.

[Learn more about our facility management solutions >](#)

[GEMS: Sustainability of your estate on GOV.UK >](#)

9. [Project] Develop a decarbonisation plan aligned with national net-zero targets

The UK's legal commitment to net-zero by 2050 (and the DfE's interim targets for the education estate) require schools to plan a credible decarbonisation pathway; SEMS Level 4 expects this to be embedded in the estate strategy. Building Spatial Intelligence can help with the data foundation (energy baseline, building fabric, asset condition); the plan itself is typically authored by a sustainability lead or specialist consultant.

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[DfE Sustainability and Climate Change Strategy on GOV.UK >](#)

10. [Project] Pursue solar PV or other on-site renewables

On-site renewable generation reduces operating costs, supports carbon reduction and demonstrates climate leadership; the Great British Energy Solar Partnership (GBESP) and Sustainability Support Programme actively support schools to deploy. Building Spatial Intelligence delivered as a trusted partner across all three GBESP consortia and can help you scope feasible options including Power Purchase Agreements as a no-capex route; book a free consultation.

Book a free consultation >

DfE Sustainability and Climate Change Strategy on GOV.UK >

11. [Quick win] Embed sustainability criteria in your procurement

Routine procurement of estate services, contractors and materials is one of the largest levers you have for carbon reduction, and the Procurement Act 2023 now requires public bodies to consider environmental impact. Update your procurement template to include carbon, water, materials and waste criteria, and weight them appropriately in evaluation.

GEMS: Planning your estate resources on GOV.UK >

12. [Project] Embed sustainability in operations and curriculum

The DfE's Sustainability and Climate Change Strategy expects sustainability to run through both operational practice and the curriculum, plus support green-skills development for pupils. Audit your current curriculum offer for climate, nature and sustainability content, identify gaps, and link operational improvements (energy, waste, nature) into pupil engagement.

DfE Sustainability and Climate Change Strategy on GOV.UK >

DfE annual return readiness

The annual return asks 28 questions. On your answers, 12 can be answered today and 16 cannot be answered until you find something out. Use this as your working draft. The sections below follow the DfE's own structure.

Annual return section	Counts toward	You can answer	Must find out
Strategic estate management	Level 2	2 of 6	4
Planning and organising your estate resources	Level 1	6 of 11	5
Understanding and managing your land and buildings	Level 2	2 of 7	5
Maintaining your estate	Levels 1–2 (max 2)	2 of 2	None
Sustainability	Level 3	0 of 1	1
Digital technology	Level 3	0 of 1	1

Counts toward is the maturity level each section is graded at in the DfE's own results. The return does not assess every area at every level. Planning and organising is the only Level 1 area, the baseline everything else builds on, and carries 11 of the 28 questions. Sustainability and Digital technology are the only Level 3 areas and are one question each, so they are often the cheapest route to a higher level. Level 4 is not assessed by this return at all.

Must find out counts the questions where you answered "not sure" or "don't know". The DfE does not score uncertainty in your favour, so these have to be established before you can file. None means every question in that section is answerable today.

The 16 questions you cannot yet answer

- Strategic estate management: Estate vision
- Strategic estate management: Estate strategy with 3–5 year investment plans
- Strategic estate management: Estate strategy reviewed at least yearly
- Strategic estate management: What the asset management plan includes
- Planning and organising your estate resources: Governing board strategic oversight
- Planning and organising your estate resources: Board estate management expertise
- Planning and organising your estate resources: Named person responsible for the estate
- Planning and organising your estate resources: Qualifications of that person
- Planning and organising your estate resources: Contractor due diligence
- Understanding and managing your land and buildings: CDC data used to plan and prioritise
- Understanding and managing your land and buildings: All settings surveyed in the last 5 years
- Understanding and managing your land and buildings: Information held to manage the estate
- Understanding and managing your land and buildings: Terms under which land and buildings are occupied
- Understanding and managing your land and buildings: RPA membership or commercial insurance
- Sustainability: Nominated sustainability lead
- Digital technology: Digital infrastructure in estate planning decisions

Each is usually a short piece of work. The priorities that follow say where to start.

Your top priorities

Ten specific things to act on first, ranked by the gap between your current answer and what the DfE expects at Level 3 (Fully Effective).

1 critical compliance flag listed earlier.

Non-negotiable. Start there before working through the rest.

Start with your data position

The DfE's data-led funding direction makes these the highest-leverage items. Building Spatial Intelligence can help with each.

1. **[Project] [L1]** Strategic Estate Management
Build a data-led asset management plan
[Book a free consultation >](#)
2. **[Project] [L1]** Data & Information
Build a comprehensive digital asset register
[Book a free consultation >](#)
3. **[Programme] [L1]** Data & Information
Get a local condition survey into every setting
[Book a free consultation >](#)
4. **[Quick win] [L1]** Data & Information
Use your Condition Data Collection data to set priorities
[Book a free consultation >](#)

Then close the other gaps

Ranked by urgency. L1 = baseline (mandatory), L2 = transitioning, L3 = fully effective, L4 = advanced, 10YS = 10-Year Strategy direction.

1. **[Project] [L1]** Strategic Estate Management
Develop a documented estate vision
[Book a free consultation >](#)
2. **[Project] [L1]** Strategic Estate Management
Develop a current estate strategy
[Book a free consultation >](#)
3. **[Quick win] [L1]** Governance & Leadership
Establish board-level strategic oversight of the estate
[GEMS: Planning your estate resources on GOV.UK >](#)
4. **[Quick win] [L1]** Governance & Leadership
Name the individual(s) responsible for day-to-day estate management
[GEMS: Planning your estate resources on GOV.UK >](#)

5.

[Project] [L1]

Secure estate management expertise for your board

Estate Management Competency Framework on GOV.UK >

Governance & Leadership
6.

[Quick win] [L2]

Complete asbestos awareness training for relevant staff

HSE: Asbestos training on GOV.UK >

Risk & Compliance

Alignment with the DfE 10-Year Estates Strategy

The strategy commits the DfE to a more data-led, climate-resilient estate run by capable, professionally-supported Responsible Bodies. Here's where you align with that direction, and where you don't.

ON TRACK (3)

- Named owner accountable for estate data quality
- RAAC position surveyed and documented
- Cyber risks documented, controlled and response-planned

FALLING SHORT (20)

- ! Complete, up-to-date asset register
- ! Energy, water and carbon use tracked across the estate
- ! Estate data held in a structured, DfE-aligned format
- ! Using digital tools or BIM to manage the estate
- ! Data-ready for funding applications
- ! Ready for the DfE's annual estate management return
- ! Digital infrastructure considered in estate planning
- ! Energy, water and carbon data driving estate decisions
- ! Documented estate strategy in place
- ! Asset management plan covering maintenance, investment and renewal
- ! Board holds strategic oversight of the estate
- ! DfE Estate Management Competency Framework applied
- ! Engaged with the Renewal and Retrofit Programme
- ! Prepared for the replacement of the Condition Improvement Fund
- ! Climate action plan in place
- ! Sustainability lead nominated
- ! Flood risk assessed across every site
- ! Overheating risk assessed and adaptation measures identified
- ! Decarbonisation plan aligned with net-zero targets
- ! Solar PV or on-site renewables installed or in procurement

Want to talk this through?

Book a free consultation with our team.

We'll walk through your biggest gaps and the fastest wins.

Book a free consultation >

or call us on 01253 376376