



Jo Marchant MA, MBA, FISBL

- **Author and Estates Professional**
- **20 years' experience of managing estates**
- **Previously Head of Estates for a multi-academy trust**
- **Currently Estates Professional for an alternative provision**
- **Co-ordinator for The Trust Network**





The Trust Network

Supporting schools to implement good estates management

- Easy and **free** to join
- Free access to **events, news** and **support**
- Nationally recognised group for **School Estates Management**

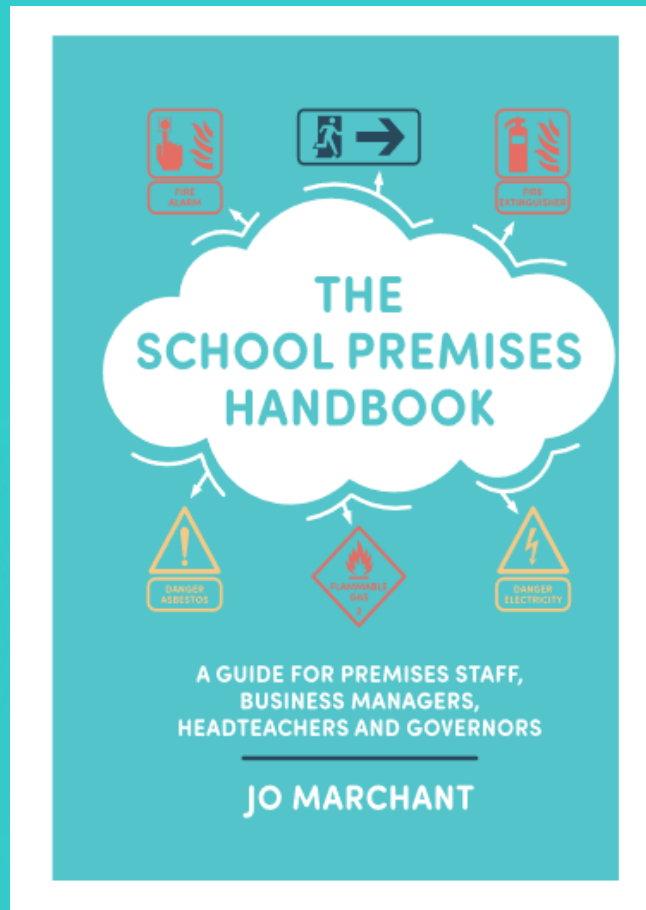
More Information:

Web: www.thetrustnetwork.org.uk

Tel: 0121 262 4725

Email: info@thetrustnetwork.org.uk





Available to buy at:

https://www.amazon.co.uk/School-Premises-Handbook-headteachers-governors/dp/1398388793/ref=sr_1_1?crid=2Z56I2D29CKGK&keywords=jo+marchant&qid=1696836718&sprifix=jo+marchant%2Caps%2C83&sr=8-1

<https://www.waterstones.com/book/the-school-premises-handbook-a-guide-for-premises-staff-business-managers-headteachers-and-governors/jo-marchant/9781398388796>

THE PROFESSIONALISATION OF SCHOOL PREMISES STAFF – 3 KEY EVENTS



1



2

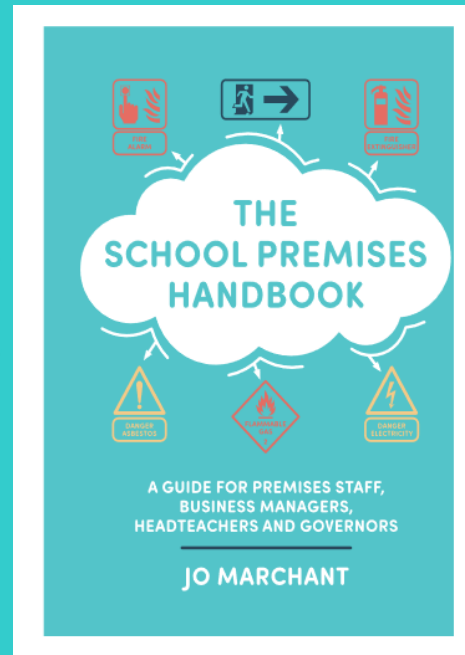
Department
for Education

Estate management competency framework

Functions, skills, and knowledge required to effectively manage
the school estate

June 2023

3



THE PROFESSIONALISATION OF SBMs – AS AT 2018



Professionalization Criteria	Progress of School Business Management
“Entry qualifications and formal on-going professional learning once appointed”	The DfE refuses to mandate that SBMs should have a minimum qualification in order to practice and there is no mandate for continuing professional development either.
“Self-regulation of professional practice through, for example, codes of ethics”	ISBL demands that its Fellows sign its code of ethics and their Fellowship can be rescinded if this is breached. However, only 150 out of 11,368 SBMs are Fellows.
“Professional associations that pertain exclusively to the occupation and advise and advocate for it”	ISBL is school business management's dedicated professional association.
“Recognised skills, proficiencies and work standards”	ISBL's Professional Standards has 4 tiers of practitioner level and states the skills, proficiencies and standards expected for each tier. However, it has yet to be widely accepted within the sector.
“Level of eminence and esteem in which the occupation is held by the public at large”	The SBM role is mostly unknown outside of the education sector.

Comparison of school business management with Wilensky's professionalization criteria (1964)

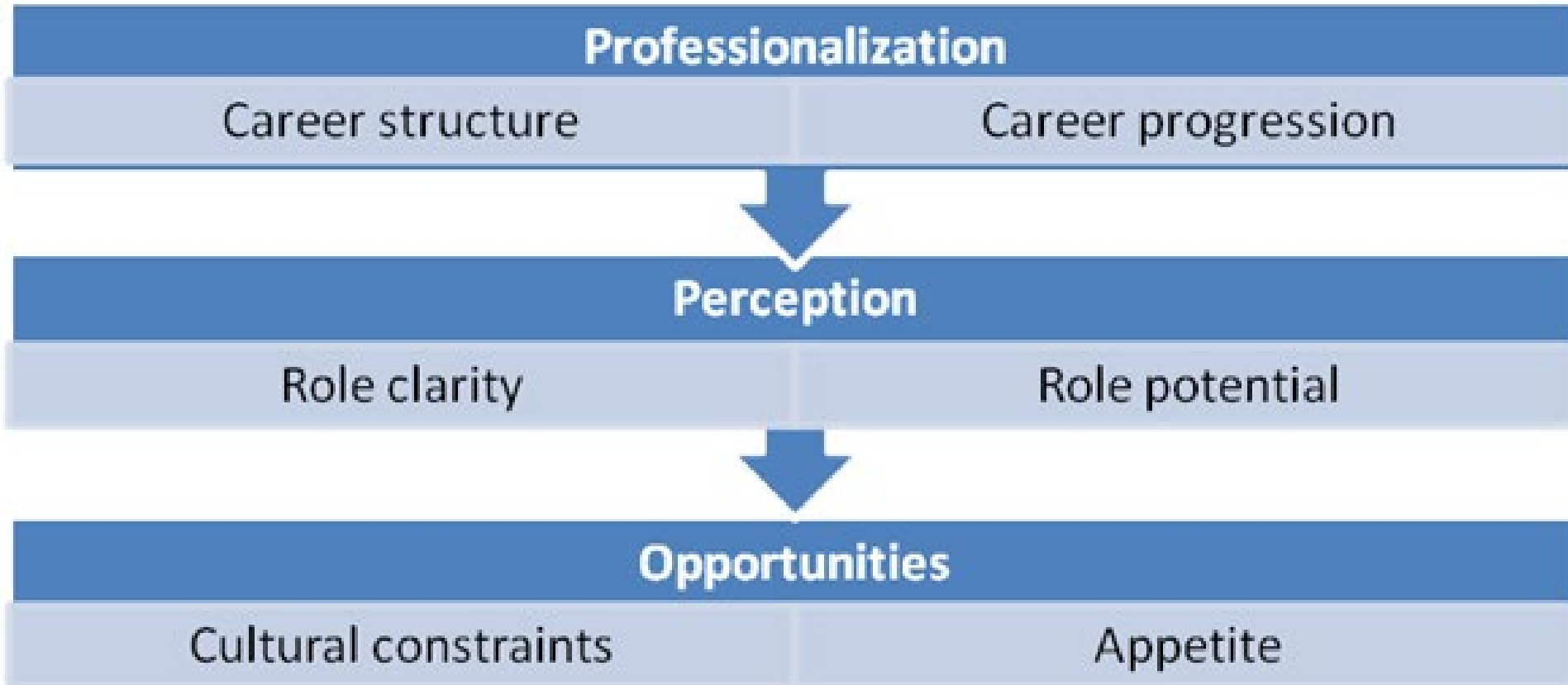
THE PROFESSIONALISATION OF PREMISES STAFF



Professionalization Criteria	Progress of School Premises Staff
“Entry qualifications and formal on-going professional learning once appointed”	There are no mandated qualifications for school premises staff and no mandate for continuing professional development either.
“Self-regulation of professional practice through, for example, codes of ethics”	There is no code of ethics for school premises staff, but we are all bound by the Nolan Principles.
“Professional associations that pertain exclusively to the occupation and advise and advocate for it”	There is the Institute of Workplace & Facilities Management but that is not an organisation that most school premises staff will have heard of.
“Recognised skills, proficiencies and work standards”	The DfE’s Estate Management Competency Framework was launched in June 2023.
“Level of eminence and esteem in which the occupation is held by the public at large”	The depth and breadth of the role of premises staff is little understood both in schools and outside of education.

Comparison of school premises staff with Wilensky’s professionalization criteria (1964)

WHY IS PROFESSIONALISATION IMPORTANT?



1. Strategic estate management
2. Planning and organisation your estate resources
3. Understanding and managing your land and buildings
4. Performance management and sustainability
5. Health and safety compliance
6. Maintaining your estate
7. Managing your estate projects

https://assets.publishing.service.gov.uk/media/647f4060b32b9e0012a962e8/Estate_management_competency_framework.pdf

ESTATE MANAGEMENT COMPETENCY FRAMEWORK (2)



Strategic approach to the way the estate is managed

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Undertakes relevant activities identified in the estate strategy and asset management plan	Supervises the delivery of activities identified in the estate strategy and asset management plan	Helps to develop the estate vision, strategy and asset management plan to support the organisation's needs and requirements	Sets out the estate vision, strategy and asset management plan to support organisation's needs and requirements
Identifies and escalates concerns about areas for improvement on the estate	Identifies areas for improvement on the estate	Manages the programming and delivery of activities identified in the asset management plan	Ensures the strategic and operational management of the estate supports the organisation's educational priorities
Undertakes training as required	Identifies and addresses training needs of operative staff	Manages the allocation and procurement of resources to undertake all estates related activities	Coordinates and manages reviews of the estate strategic documentation to ensure they meet organisational and educational requirements, deliver value for money, and effectively prioritise expenditure

Competency Level 1: Operative	Competency Level 2: Supervisor	Competency Level 3: Manager	Competency Level 4: Strategic
Premises assistant	Premises manager	Premises manager	Premises director
Caretaker	Office manager	Business manager	Head teacher

BENCHMARKING SKILLS & KNOWLEDGE



Strategic approach to the way the estate is managed

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Undertakes relevant activities identified in the estate strategy and asset management plan	Supervises the delivery of activities identified in the estate strategy and asset management plan	Helps to develop the estate vision, strategy and asset management plan to support the organisation's needs and requirements	Sets out the estate vision, strategy and asset management plan to support organisation's needs and requirements
Identifies and escalates concerns about areas for improvement on the estate	Identifies areas for improvement on the estate	Manages the programming and delivery of activities identified in the asset management plan	Ensures the strategic and operational management of the estate supports the organisation's educational priorities
Undertakes training as required	Identifies and addresses training needs of operative staff	Manages the allocation and procurement of resources to undertake all estates related activities	Coordinates and manages reviews of the estate strategic documentation to ensure they meet organisational and educational requirements, deliver value for money, and effectively prioritise expenditure



TRAINING COURSES FOR PREMISES STAFF



Introduction to School
Estate Management



Introduction to Managing
School Building
Compliance



IOSH Accredited Health
and Safety Training for
SBPs

HOW THE BUILT ENVIRONMENT IMPACTS TEACHING & LEARNING



“Differences in the physical characteristics of classrooms explain 16% of the variation in learning progress over a year” with “light, temperature and air quality most influential, accounting for half the learning impact”.

“Clever classrooms” University of Salford (2015)

HOW THE BUILT ENVIRONMENT IMPACTS TEACHING & LEARNING



**What have you done
today to make you feel
proud?**

ANY QUESTIONS OR COMMENTS?

