Orchard Multi-Academy Trust

Asset Management Plan

Reviewed: Spring 2026

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Purpose and Strategic Context

This Asset Management Plan sets out how Orchard MAT will plan, fund, operate, maintain and renew its estate and capital assets to ensure safe, warm, weather-tight schools and value for money, aligned to educational priorities and the Trust strategy. It aligns to DfE's Good Estate Management for Schools (GEMS) and the School Estate Management Standards (SEMS), and satisfies the Academy Trust Handbook (ATH) expectation to manage the estate "strategically and effectively" and keep it "in a safe working condition."

Objectives:
Keep all buildings safe, compliant and fit for purpose.
Move from reactive to planned, risk-based lifecycle management in line with School Estate Management Standards Level 3.
Evidence-based capital planning informed by CDC2 and local surveys.
Integrate sustainability and the Trust's Climate Action Plan (CAP) with asset decisions.

Scope
Assets covered:
Land, buildings, structures, mechanical and electrical systems, fixtures, ICT infrastructure in-building, statutory systems (fire, water, gas, electrics), Trust vehicles above the Trust's capitalisation threshold.

Exclusions:
Teaching and learning consumables; IT end-user devices below capital threshold.

1.Governance, Roles and Decision Rights

Trust Board: Approves Asset Management Plan, Risk Register, and the rolling 5-year Capital & Estates Strategy.

Audit and Risk Committee: Oversight of compliance and programme delivery.

CFO: Accountable for financial governance, capital approvals and fixed asset register.

CEO: Accountable for estate compliance, condition planning, and project delivery to School Estate Management Standards.

Compliance and Health & Safety Officer and School Leaders/Site Teams: Day-to-day H&S checks, statutory logs, defect reporting.

Delegated authority follows the ATH and Trust Scheme of Delegation; any novel/ contentious transactions or land disposals follow DfE approval routes.

2.Compliance & Health and Safety Framework

We will maintain demonstrable compliance across high-risk areas with documented evidence, schedules, and remedial actions:

Fire safety: Fire risk assessments; testing/inspection of alarms, emergency lighting, fire doors; actions tracked to closure.

Asbestos: Management surveys/registers, plans of work, contractor briefings, annual reviews.

Water hygiene (Legionella): Risk assessments, temperature monitoring, flushing regimes, remedial works.

Gas, electrical, lifts, pressure systems, playgrounds: Statutory inspections per manufacturers/HSE best practice; defect rectification within risk-based timescales.

Compliance standards and the maturity journey are benchmarked against SEMS Levels 1–4, targeting Level 3 across all schools.

3.Data, Systems and Information

Fixed Asset Register (FAR): Maintained monthly on Xero by CFO; reconciled to balance sheet; disposals and impairments controlled.

Smart Log: Central repository for condition surveys, O&M manuals, drawings, warranties, compliance certificates and risk assessments

Building Information: Drawings and key asset data stored in open formats; move toward "Level 3 SEMS" digital information to support planning and compliance assurance.

4.Capitalisation, Depreciation and Inventory

Capitalisation threshold: £5,000 per the Trust policy; below-threshold items controlled via inventory but not capitalised. (This separation of FAR vs. inventory is required by Academy Trust Handbook expectations and sector best practice.)

Enhancement vs maintenance: Expenditure that increases capacity, life or performance is capital; like-for-like repairs are revenue.