Public Report
Cabinet

Committee Name and Date of Committee Meeting
Cabinet – 16 November 2026

Report Title
Maintained Schools Long-Term Maintenance Plan (LTMP)

Is this a Key Decision and has it been included on the Forward Plan?
No, but it has been included on the Forward Plan

Executive Director Approving Submission of the Report
Judith Badger, Executive Director of Corporate Services

Report Author(s)
Kevin Miller Head of Facilities Management & Compliance
kevin.miller@rotherham.gov.uk

Ward(s) Affected
Borough-Wide

Report Summary

This report provides an update on the maintained schools condition survey programme and the development of the Long-Term Maintenance Plan (LTMP). It seeks Cabinet's agreement to the principles for assessing the survey findings and prioritising future investment, taking account of building condition, statutory compliance, operational risk, available funding and delivery capacity. This will include engagement between Property and Facilities Services and Children and Young People's Services to ensure that priorities reflect school place sufficiency, future educational demand and planned academy conversions.

The 2026/27 Capital Programme totals £1,679,613, comprising £728,079 of Department for Education School Condition Allocation funding and £951,534 carried forward from previous years. It addresses priority building condition and compliance works. The LTMP will establish a consistent evidence base for prioritising future maintenance and lifecycle replacement across the 17 settings identified in this report.

Initial modelling indicates a potential investment requirement exceeding £20 million, subject to completion and validation of surveys. This is an indicative estimate, not an approved budget or a commitment to spend within 2027–2030. The final programme will reflect assessed risk, educational need, available funding and delivery capacity.

No additional funding approval is sought through this report. A further report following the surveys will set out the quantified backlog, investment priorities, funding options and proposed delivery programme. The LTMP will be refreshed annually, with progress and the forward programme reported to Cabinet.

Recommendations

That Cabinet:

1. Note the commencement of the maintained schools stock condition and asset verification survey programme, funded through existing capital budgets.

2. Note the emerging evidence that condition, compliance and lifecycle investment requirements may exceed available Department for Education School Condition Allocation funding, subject to completion and validation of the surveys.

3. Agree the proposed principles for assessing the condition survey findings and prioritising future investment, including joint working with Children and Young People's Services on school place sufficiency, future educational demand and planned academy conversions.

4. Agree to receive a further report following completion of the stock condition surveys setting out the quantified maintenance backlog, prioritised investment requirements, proposed programme of works and associated funding requirements.

List of Appendices Included
Appendix1: Current Schools Capital Programme 2026-27 Summary
Appendix 2: Equality Analysis Screening Assessment - Maintained Schools LTMP
Appendix 3: Carbon Impact Assessment - Maintained Schools LTMP

Background Papers
None

Consideration by any other Council Committee, Scrutiny or Advisory Panel
Improving Lives Select Commission 03 November 2026

Council Approval Required
No

Exempt from the Press and Public
No

Maintained Schools Long-Term Maintenance Plan (LTMP)

1. Background

1.1 The Council retains responsibility as asset owner for the strategic management, long-term condition and capital investment requirements of maintained school buildings across the borough. These assets support the delivery of education services and play a vital role in ensuring staff, children and young people have access to safe, compliant and suitable learning environments. Whilst schools are responsible for the day-to-day operation and occupation of their premises, the Council has a responsibility to protect the long-term integrity, functionality and sustainability of the maintained school estate through appropriate asset management and capital investment.

1.2 Maintained schools receive devolved revenue budgets and are responsible for funding and managing routine repairs, planned preventative maintenance, statutory servicing, inspections and the day-to-day upkeep of their buildings. This includes ensuring that their buildings' systems are appropriately maintained, serviced and operated in accordance with statutory and operational requirements.

1.3 Capital investment within maintained schools is funded principally through the DfE School Condition Allocation (SCA). This funding is intended to support priority capital major works that ensure school buildings remain safe, warm and dry and that major building infrastructure continues to operate effectively. Typical projects include roof replacements, heating and boiler renewals, fire safety systems, electrical infrastructure, structural repairs and significant building fabric improvements which are beyond the scope of normal school revenue budgets.

1.4 The Council's role is therefore to ensure that major building components and infrastructure are maintained, renewed and replaced through planned capital investment, whilst schools continue to manage routine maintenance through their devolved revenue budgets.

1.5 For 2026/27, the Council has received £728,079 in DfE School Condition Allocation funding together with £951,534 of carried-forward funding from previous years, providing a total programme allocation of £1,679,613.

1.6 The annual programme for 2026/27 continues to deliver works identified through the DfE surveys and, although limited in detail, they bring some focus to carrying out safeguarding, statutory compliance and minor structural defects, ensuring that available funding is deployed where it delivers the greatest benefit.

1.7 The maintained education estate currently comprises 17 settings: 13 maintained schools, 3 maintained nursery schools and 1 Pupil Referral Unit. The current 2026/27 Capital Programme does not provide works at every setting. Appendix 1 records the individual schemes currently planned or being delivered and should not be read as a list of 17 separate schools

or settings, because some sites have more than one scheme, and settings with no current scheme do not appear. The LTMP will consider the condition, compliance, lifecycle and investment requirements of all 17 settings.

1.8 The LTMP covers the settings/schools for which the Council manages the School Condition Allocation. Voluntary-aided schools have separate capital funding arrangements through their responsible bodies and are not included in this programme. Their governing bodies generally hold responsibility for capital expenditure on school buildings, with the Council retaining responsibility for playing fields.

1.9 Regularly updated condition surveys will support maintenance planning, lifecycle replacement and capital investment decisions across the maintained school estate.

1.10 Whilst condition information is available from Department for Education surveys and other historic records, the information currently available does not provide the level of detail required to fully understand the condition, compliance, lifecycle and capital investment requirements of the maintained school estate. In particular, it does not consistently identify the actions, priorities, timescales and investment requirements necessary to maintain school buildings in a planned and sustainable manner over the medium to long term.

1.11 After two failed attempts due to market conditions and availability of suitably qualified surveyors, a contract is now in place to carry out stock validation and condition surveys across the estate with focus being placed on maintained schools over the coming months. The stock condition and asset verification programme will therefore provide a more comprehensive evidence base to support future investment planning, prioritisation and the development of the LTMP.

2. Key Issues

2.1 Development of a Long-Term Maintenance Plan

2.1.1 The Council currently invests available DfE School Condition Allocation funding in priority capital works across maintained schools. The 2026/27 programme of £1.679m has been developed from the condition information currently available, including DfE survey findings, known building failures and defects, statutory compliance requirements, project development work and issues reported through engagement with schools.

2.1.2 Whilst this investment continues to address the highest-priority risks, the work undertaken to date indicates that the scale of future investment required across the maintained school estate may exceed the level of funding currently available through annual DfE allocations.

2.1.3 The LTMP will build on existing project and survey information to provide a consistent, estate-wide basis for prioritising investment and planning future works.

2.1.4 Development and implementation of the LTMP will be undertaken jointly by Property and Facilities Services and Children and Young People's Services (CYPS).

2.1.5 Building condition, statutory compliance and lifecycle replacement requirements will form the basis for investment planning and future prioritisation, while ensuring an approach linked to pupil place planning, educational sufficiency requirements, future demand, operational considerations and wider strategic education priorities.

2.1.6 The LTMP will be maintained as a live plan and refreshed annually to reflect changes in asset condition, compliance risk, pupil place planning, educational need, funding availability and delivery progress.

2.1.7 An annual update will be presented to Cabinet setting out delivery against the current programme and the proposed forward programme. The update will identify works completed, current priorities, emerging requirements, anticipated outcomes, available funding and any further decisions required from Cabinet.

2.2 Emerging Asset and Infrastructure Pressures

2.2.1 There is increasing evidence that many elements of the maintained school estate are approaching or have exceeded their expected operational life.

2.2.2 The heating replacement scheme at Broom Valley Primary School illustrates the substantial investment that can be required when ageing infrastructure needs renewal. Detailed design and market testing have identified the complexity of the replacement works and the effect of construction cost pressures.

2.2.3 Whilst Broom Valley remains a priority project, it also highlights a wider challenge facing the maintained school estate. Similar pressures are anticipated across roofing systems, heating infrastructure, mechanical and electrical installations, fire safety systems and key building fabric elements as more detailed condition information becomes available.

2.2.4 Without planned investment, the Council faces increasing risks associated with:

- Failure of ageing building infrastructure.
- Growing maintenance backlogs.
- Escalating reactive repair costs.
- Increased health and safety and compliance risks.
- Disruption to educational delivery.
- Reduced resilience of school buildings.

2.2.5 The Council's current programme enables critical risks to be managed but does not provide sufficient capacity to systematically address all emerging condition and lifecycle replacement requirements across the portfolio.

2.3 Condition Survey Programme and Evidence Base

2.3.1 To establish an accurate understanding of future investment requirements, Facilities Management has commissioned a comprehensive programme of stock condition and asset verification surveys across the maintained school estate. Survey mobilisation is complete, and inspections commenced in August 2026. Upon completion (Q1 2027), the programme will provide the first comprehensive assessment of:

- Building condition and deterioration trends.
- Statutory compliance requirements.
- Maintenance and renewal liabilities.
- Lifecycle replacement needs.
- Future capital investment priorities.
- Risks to operational continuity and educational provision.

2.3.2 The survey programme is a critical component of the LTMP and will enable future investment decisions to be based upon assessed risk, asset condition and compliance priorities rather than reacting to failures when they occur.

2.3.3 Completion of the survey programme will enable the Council to assess and prioritise requirements consistently across the maintained estate. The findings will be considered alongside CYPS pupil place planning, statutory compliance, operational risk, educational need, affordability and deliverability.

2.3.4 This will enable the Council to establish a clear programme of works setting out the proposed sequence of investment, anticipated outcomes, funding requirement and delivery timescales. Although the LTMP is expected to cover a medium-term planning period, its final duration and delivery profile will be determined following completion of the surveys and consideration of the resources available.

2.4 Sufficiency of Current Funding and Future Investment Requirements

2.4.1 The Council currently relies primarily on annual DfE School Condition Allocation funding to deliver capital investment within maintained schools.

2.4.2 A significant proportion of annual funding is increasingly being directed toward responding to failures in ageing infrastructure, leaving limited capacity to address wider deterioration or progressively reduce backlog maintenance. Consequently, investment is heavily focused on managing the highest-risk priorities rather than providing a sustainable long-term solution.

2.4.3 Early review, existing asset intelligence and preliminary investment modelling indicate a potential investment requirement in excess of £20

million. This estimate assumes that the condition and investment needs identified through future surveys are broadly consistent with those found at schools assessed to date, particularly where there has been limited investment over a prolonged period. The modelling draws on known condition and compliance pressures, anticipated lifecycle replacement of major building components and infrastructure, and current project cost evidence. It is intended to provide an initial indication of the potential scale of the challenge pending completion of the comprehensive survey programme.

2.4.4 The period 2027 to 2030 is an initial medium-term planning horizon and does not represent a requirement to spend the full estimated amount within four years. The programme may need to be phased over a longer period, depending on the completed survey evidence, the urgency and sequencing of identified works, affordability, funding availability and the Council's capacity to deliver. The £20 million estimate is not a definitive funding requirement and will be refined through the condition survey programme and subsequent prioritisation process.

2.4.5 The LTMP will identify:

- The minimum investment required to ensure all maintained schools remain safe, warm, dry, compliant and operational.
- The optimum level of investment required to reduce backlog maintenance and improve long-term asset sustainability.
- A realistic and affordable delivery programme based upon risk, priority and available resources.

2.4.6 A further report will be presented once all surveys are completed and will include:

- The findings of the condition survey programme.
- The quantified maintenance backlog.
- Prioritised condition and compliance risks.
- Recommended investment priorities.
- The proposed Long-Term Maintenance Plan, using 2027–2030 as an initial planning horizon, with its final duration and phasing subject to survey findings, priorities, available funding and delivery capacity.
- An annual prioritised plan
- The capital funding requirement necessary to support the strategy.

2.4.7 Funding options and programme phasing will be assessed following completion of the surveys. Any funding proposal will be subject to separate consideration through the Council’s budget and approval arrangements.

2.5 Delivery Capacity and Market Readiness

2.5.1 Alongside the development of the LTMP, Property and Facilities Services is reviewing the Council's capacity to successfully plan, procure and deliver a larger capital investment programme across the maintained school estate.

2.5.2 Understanding the level of investment required is only part of the challenge. The Council must also ensure that it has sufficient project management, technical, procurement and contractor resources and capacity to deliver future programmes effectively.

2.5.3 Delivering capital works within schools is particularly complex and requires careful planning around school calendars, examinations, safeguarding requirements and operational activities. Major projects are typically undertaken during school holiday periods wherever possible to minimise disruption to pupils and educational delivery.

2.5.4 Facilities Management and Building Design Services are therefore reviewing:

- Programme and project management capacity.
- Technical design and surveying resources.
- Procurement and contract management arrangements.
- Access to suitably qualified contractors and specialist suppliers.
- Framework and commissioning arrangements.
- Capacity to deliver multiple projects simultaneously.
- Workforce planning and succession arrangements.

The delivery review will assess whether eligible project management, design and technical costs can be met through the capital programme, subject to Finance confirming the applicable accounting treatment and funding conditions. Any costs that cannot be capitalised will be identified separately and considered through the budget process. No additional staffing or revenue commitment is proposed through this report.

2.6 Academy Conversion and Landlord Responsibilities

2.6.1 The Council remains the responsible body and landlord for maintained schools until the date that any individual school formally converts to academy status. During this period, the Council retains responsibility for the strategic management of the asset and for ensuring that major building infrastructure, capital investment and statutory landlord obligations are appropriately discharged.

2.6.2 Maintained Schools themselves remain responsible for managing their devolved revenue budgets, including routine repairs, maintenance, servicing, inspections and day-to-day building management. The Council's role is to manage wider capital investment requirements associated with the integrity, sustainability and long-term operation of maintained school buildings, including major lifecycle replacement and renewal of infrastructure such as roofs, heating systems, fire safety systems, electrical infrastructure and structural elements.

2.6.3 On academy conversion, responsibility for the operation, maintenance and capital planning of school premises transfers in accordance with the agreed conversion documents and any lease. Any continuing Council obligations

will be determined by those agreements and the applicable legal requirements.

2.6.4 While a school remains maintained, investment priorities will be assessed consistently against condition, statutory compliance, safety, educational need and available resources. Any conversion arrangements will be considered with CYPS, Legal Services and the relevant trust to clarify responsibility for planned or ongoing works and support continuity of education.

3. Options considered and recommended proposal

3.1 Option 1: Continue with reactive and DfE survey approach

3.1.1 This option would continue the existing approach, prioritising projects within annual DfE allocations.

3.1.2 Whilst this would allow delivery of some priority schemes, it would not address increasing backlog maintenance requirements or provide a long-term solution to emerging condition liabilities.

3.1.3 The current DfE surveys provide useful condition information but do not assess all aspects of the works that may be required within school buildings. Their scope and level of detail do not consistently capture the full range of condition, compliance, mechanical and electrical, lifecycle replacement and operational requirements. Continuing to rely on this information alone would therefore not provide a complete evidence base for assessing liabilities or prioritising future investment across the maintained school estate.

3.2 Option 2: Agree the principles for assessing survey findings and prioritising investment through the Maintained Schools Long-Term Maintenance Plan

3.2.1 This option would establish the principles for assessing the condition survey findings and prioritising future investment, taking account of asset condition, statutory compliance, operational risk, affordability and deliverability. Property and Facilities Services would work jointly with Children and Young People's Services to ensure that priorities reflect school place sufficiency, future educational demand and planned academy conversions.

3.2.2 The LTMP would provide the evidence base for longer-term financial planning, reduce reliance on reactive intervention and establish a clearer programme of works linked to defined outcomes and delivery timescales.

3.2.3 The associated funding requirement will be developed through the Council's budget and capital programme processes and will be subject to separate approval.

3.2.4 The strategy would support:

- Long-term financial planning.
- Better value for money.
- Reduced reactive maintenance in the longer term.
- Improved compliance.
- Improved resilience and sustainability of educational assets.

This is the recommended option.

4. Consultation on proposal

4.1 Maintained schools will be informed of the proposed approach through the Local Authority Maintained Schools (LAMS) forum. Engagement with individual schools will inform survey findings, priorities and the planning of proposed works. Approval of specific investment proposals will be considered through the subsequent LTMP report and relevant budget decisions.

4.2 Internal consultation will take place with CYPS and Finance as outlined in the report in order to prioritise works accordingly.

5. Timetable

5.1

Milestones	Target Date
Survey mobilisation and scheduling completed	August 2026
Pilot survey validations and quality checks	Autumn 2026
2027 DfE-funded Projects Plan & Schedule (BAU)	Winter 2026/27
Completion of all Maintained School Surveys	Q1 2027/28
Completion of prioritised Long-Term Maintenance Plan	Spring 2027
Presentation of Capital investment needs and strategy	May 2027
Delivery of phased programme of capital works	2027–2030: initial planning horizon only. Subject to survey findings, priorities, available funding, delivery capacity and subsequent approvals.

6. Financial and Procurement Advice and Implications

6.1 The Council's maintained school capital programme is funded through the Department for Education (DfE) School Condition Allocation (SCA). For 2026/27, available resources total £1.680m, comprising £728,079 of SCA funding and £951,534 of unspent allocation carried forward from previous years.

6.2 Whilst annual SCA funding allocations support the delivery of priority condition, compliance and health and safety works, emerging evidence indicates that future investment requirements across the maintained

school estate are likely to exceed the level of annual DfE capital funding allocations. This increases the risk of a growing maintenance backlog and limits the Council's ability to address wider lifecycle replacement requirements.

6.3 No additional capital funding approval is being sought through this report. A programme of condition and asset surveys is underway to establish the scale of future condition works and investment needs across the maintained school estate.

6.4 Following completion of this work, the findings and proposed LTMP will be considered through the Council's budget and internal governance processes. A further report will then be presented to Cabinet setting out the quantified maintenance backlog, proposed programme of works, delivery timescales and associated funding requirements.

7. Legal Advice and Implications

7.1 The recommended proposals are in accordance with the conditions of use of the current Department for Education fund.

7.2 Furthermore, the proposals meet the Local Authority's fundamental statutory duties and obligations under s542 Education Act 1996, the Education (School Premises) Regulations 1999 and s22 School Standards and Framework Act 1998.

8. Human Resources Advice and Implications

8.1 There are no Human Resources implications arising from the recommendations set out in the report.

9. Implications for Children and Young People and Vulnerable Adults

9.1 The programme directly supports safe, healthy and effective learning environments for children and young people attending maintained schools.

9.2 Investment in school buildings reduces the risk of service disruption arising from building failures and supports continuity of education provision.

9.3 Alignment of the LTMP with CYPS pupil place planning will ensure that proposed investment takes account of future educational demand, sufficiency requirements and any planned changes to provision. This will support investment in the appropriate settings at the appropriate time.

10. Equalities and Human Rights Advice and Implications

10.1 No direct equality or human rights implications have been identified at this stage. This report seeks approval for the development and delivery of the LTMP and the supporting evidence base rather than approval of specific investment proposals.

10.2 The Equality Impact Assessment will be reviewed and updated as part of the annual refresh of the LTMP and will inform future reports presented to Cabinet.

10.3 The LTMP will support the provision of safe, warm, dry, compliant and accessible learning environments across the maintained school estate.

10.4 As the LTMP is developed and refreshed, a full Equality Impact Assessment will be undertaken to assess the potential implications of proposed investment priorities, programme delivery and funding decisions. This will ensure that future investment proposals appropriately consider the needs of children and young people, protected groups, accessibility requirements and wider equality impacts.

10.5 The Equality Impact Assessment will be reviewed and updated as part of the annual refresh of the LTMP and will inform future reports presented to Cabinet.

11. Implications for CO2 Emissions and Climate Change

11.1 The stock condition and asset verification surveys include consideration of energy performance, asset efficiency, lifecycle replacement requirements and opportunities to improve the environmental performance of the maintained school estate.

11.2 As the LTMP is developed, individual investment priorities will be reviewed to identify opportunities to improve energy efficiency, reduce carbon emissions and support the Council's wider sustainability objectives, where these can be achieved alongside the primary requirement to maintain safe, warm, dry and compliant educational environments.

11.3 The LTMP will be maintained as a live programme and refreshed annually. As part of this process, carbon reduction opportunities, energy performance improvements and associated environmental impacts will be reviewed and reassessed to ensure that future investment proposals continue to support the Council's climate change and carbon reduction ambitions where practicable and affordable.

12. Implications for Partners

12.1 The development and implementation of the LTMP will require ongoing engagement with maintained schools, Children and Young People's Services (CYPS), the Department for Education and other relevant partners. The LTMP will provide a clearer evidence base to support future discussions regarding school condition, investment priorities, pupil place planning and long-term educational provision across the borough.

12.2 Maintained schools will benefit from improved visibility of future investment priorities, anticipated works programmes and longer-term asset planning arrangements. This will support forward planning and assist schools in

understanding how condition, compliance and lifecycle requirements are being assessed and prioritised across the maintained estate.

12.3 The development of the LTMP will also support more informed engagement with external funding bodies and potential delivery partners by providing a consistent understanding of condition liabilities, investment requirements and programme priorities across the maintained school estate.

13. Risks and Mitigation

13.1 Risk

Failure to secure sufficient long-term investment may result in:

- Increased maintenance backlog.
- Deteriorating building condition.
- Escalating reactive repair costs.
- Increased compliance and safety risks.
- Greater likelihood of infrastructure failure.
- Potential disruption to education delivery.
- Reduced ability to prioritise investment based on evidence and strategic need.
- Missed opportunities to align asset investment with CYPS pupil place planning and educational priorities.
- Reduced ability to secure and target future external funding and investment opportunities.

13.2 Mitigation

The risks identified within this report are mitigated through:

- Completion of the stock condition and asset verification survey programme.
- Development of a comprehensive LTMP based on consistent asset data and evidence.
- Joint working between Property and Facilities Services and Children and Young People's Services to align investment priorities with educational need.
- Annual review and refresh of the LTMP to ensure priorities remain aligned with condition, compliance, funding and service requirements.
- Future reporting to Cabinet on investment priorities, programme delivery, funding requirements and emerging risks.
- Development of a prioritised programme of works informed by condition, compliance, operational risk, educational need and affordability.

14. Accountable Officers

Kevin Miller Head of Facilities Management and Compliance

Approvals obtained on behalf of Statutory Officers: -

	Named Officer	**Date**
Chief Executive	John Edwards	27/10/26
Executive Director of Corporate Services (S.151 Officer)	Judith Badger	23/10/26
Service Director of Legal Services (Monitoring Officer)	Phil Horsfield	20/10/26

Report Author: *Kevin Miller – Head of Facilities Management and Compliance – kevin.miller@rotherham.gov.uk*

This report is published on the Council's website.