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Your Part in the SEMS Annual Return

What to have ready, and why it matters that you do

> Whilst your responsible body will submit the School Estate Management Standards annual return on your behalf, they can only do this accurately with your help. This guide sets out what the return covers, what your responsible body needs from you, and how you can best prepare.

In short

- Your responsible body submits the return. Individual schools, nurseries and other educational environments do not (see below).
- Submissions open in the third week of September 2026. The deadline is in late November 2026.
- The School Estate Management Standards annual return covers 11 core areas of estate management using multiple-choice questions.
- No documents are uploaded, the answers rely entirely on the information your organisation can provide.
- The return does not affect DfE funding allocations and is intended to identify support needs rather than act as a compliance judgement.
- Most answers depend on site-level information, and that information comes from you.

Who Submits the Return

DfE asks all school responsible bodies that are eligible for annual DfE capital funding to submit the return. This includes:

- Local authorities
- Sixth-form colleges
- Multi-academy and single-academy trusts
- Dioceses

Individual schools, nurseries and other educational environments do not submit the return. The submission must be made by someone in a senior estate management role, and it can be completed either by several colleagues covering their own sections or by one person consulting others.

If your school is part of a single-academy trust

The trust is your responsible body. The return will therefore be completed within your own organisation, and in many cases by a colleague you work with directly.

If your school is voluntary aided

Where a voluntary aided school sits within a diocese, DfE guidance confirms that the diocese completes and submits the return, and will seek input from schools or their governing bodies where necessary. If your school is voluntary aided but not part of a diocese, confirm with your local authority who will be submitting on your behalf.

Your Role in the Process

The responsible body completing the return should already have access to, or be able to obtain, much of the compliance and estate information required from across their schools.

However, schools should use this opportunity to verify that key estate and compliance records are current, complete, and readily accessible. In particular, schools should be confident that they know what information is held, where it is stored, and who is responsible for maintaining it. Any gaps, inconsistencies, or missing documentation should be identified and addressed before information is requested for the annual return.

Whilst the return is submitted by the responsible body, the accuracy of the submission depends on reliable information being available at both organisational and site level. Good preparation will help ensure that records can be located quickly and that any site-specific details can be readily validated if required.

The Purpose of the Return

The annual return is intended to provide the Department for Education with a baseline understanding of how responsible bodies manage their school estates against the School Estate Management Standards. The information collected enables DfE to measure adoption of the standards across the sector and identify areas where organisations may benefit from additional guidance, training, or support.

While the return is not currently linked to funding decisions, regulatory intervention, or formal performance assessment, it establishes a national dataset on estate management practices and provides responsible bodies with an opportunity to review their own arrangements against a recognised framework.

What the Return Covers

The return contains multiple-choice questions covering 11 core areas of estate management. Although the annual return is completed and submitted by the responsible body, the evidence needed to answer the questions may be held at either organisational or school level.

Some questions draw on strategic and governance information held centrally, while others rely on estate, condition, maintenance and compliance information relating to individual school sites. The table below indicates where schools may be asked to provide or verify information to support the return.

Section	Qs	What it covers	Where schools may be asked to provide or verify information
Strategic estate management	6	Estate vision, estate strategy and its annual review, asset management plan, climate action plan and climate goals	Mostly organisational. You may be asked for your site-level priorities and any estate work already included in your school development plan.
Planning and organising your estate resources	11	Governing board oversight and expertise, the named person responsible for the estate and their qualifications, continuity plans, climate and cyber security preparation, contractor	A significant amount. Who your premises lead is and what records they hold, your continuity and emergency arrangements, how you check contractors before

		due diligence, budget forecasting and procurement	appointment, and your procurement practice.
Understanding and managing your land and buildings	**7**	Use of Condition Data Collection data, local condition surveys, estate information held, building tenure, digital building management systems, insurance or Risk Protection Arrangement membership	The largest contribution from schools. Survey dates, the records listed later in this guide, how you occupy your site and the systems you use to manage it.

Section	Qs	What it covers	Where schools may be asked to provide or verify information
Maintaining your estate	**2**	Systems for compliance with all legal health and safety requirements, the scope of your plan for managing and inspecting the estate	Almost all of it. Your compliance records, and your inspection, maintenance and site safety routines, provide the evidence behind both answers.
Sustainability	**1**	Whether the organisation has a nominated sustainability lead	Sustainability is an increasingly important aspect of estate management. Schools should identify any colleague with responsibility for sustainability, energy management, environmental improvement, or climate action initiatives, and ensure relevant information can be provided to support the responsible body's response.
Digital technology	**1**	Whether estate planning decisions include digital infrastructure	Context on cabling, wifi, CCTV and access control where building work is planned.

How the Return Is Assessed

The return does not produce a pass or a fail, and there is no single overall score. Each of the six areas is assessed separately, and each is reported at its own level. The four levels are:

- **Level 1, Baseline.** The essentials that all organisations should have in place.
- **Level 2, Transitioning.** Good estate management practices are in place.
- **Level 3, Fully effective.** All elements needed for effective estate management are in place.
- **Level 4, Advanced.** Advanced estate management practices. This level is not assessed by the annual return.

The levels available differ by area, because the standards do not define every level for every area. The table below shows which results are possible.

Area of the standards	Levels available	Why
Strategic estate management	1, 2 or 3	All three levels are defined in the standards.
Planning and organising your estate resources	1, 2 or 3	All three levels are defined in the standards.
Understanding and managing your land and buildings	1, 2 or 3	All three levels are defined in the standards.
Maintaining your estate	1 or 2	The standards contain no level 3 criteria for this area, so level 2 is the highest available result.

Sustainability	3	The standards contain only level 3 criteria for this area, so it is assessed as met or not met.
Digital technology	3	The standards contain only level 3 criteria for this area, so it is assessed as met or not met.

DfE expects all responsible bodies to work towards level 3 where it is available, and does not expect organisations to be at that level already. Organisations meeting level 3 in some areas are unlikely to be classed as needing additional support from DfE.

After submitting, organisations can view their results, indicate whether they agree with the levels awarded, add comments, and tell DfE what is preventing them from meeting the standards.

Estate Information Required

One question in the return asks which information the organisation holds to manage the estate. Working through this list is the most useful preparation you can complete. Use the columns below to record your current position, then send the completed page to whoever is coordinating your organisation's return.

Record	Held	Location known	Action needed	Responsible
Asset register What you own, where it is and its condition.	☐	☐	☐	
Asbestos records Survey, register or management plan. If the whole estate was built after 2000, record that instead.	☐	☐	☐	
Building layout plan Current drawings that reflect the site as it stands.	☐	☐	☐	
Energy consumption data or CO2 emissions	☐	☐	☐	
Energy cost data	☐	☐	☐	
Estate running cost information Maintenance, utilities and facilities management costs.	☐	☐	☐	
Building tenure, lease or ownership The terms on which you occupy the site.	☐	☐	☐	
Statutory compliance record Safety inspections, tests and certificates.	☐	☐	☐	
Sufficiency data Capacity and pupil numbers.	☐	☐	☐	

Priority: Your Statutory Compliance Record

Of the records listed above, the statutory compliance record carries the most weight. The return asks whether systems are in place to ensure compliance with all legal health and safety requirements. DfE identifies the following areas for compliance:

- Health and safety law
- Asbestos regulations
- Legionella
- Gas safety
- Fire safety
- Statutory inspections
- Risk assessments

If your certificates, test results and inspection records are currently held across several locations, consolidating them into a single record is the most valuable preparation you can complete before the window opens.

Additional Information to Locate

The date of your last condition survey

The return asks whether settings have had local condition surveys within the last five years. These are surveys your organisation has commissioned, and are separate from the national Condition Data Collection programme. Your responsible body will need a date for your site.

Your contractor due diligence records

Before contractors are appointed, the expectation is that they have been confirmed as competent, insured, financially stable, suitably qualified and able to carry out work safely and in line with legal requirements. If you already carry out these checks, the value is in being able to demonstrate them.

Preparation Checklist

1. **Consolidate your statutory compliance record**
   One folder, digital or shared, for example via Google Drive or SharePoint, containing every current certificate, test result and inspection record. This is the highest value task on the list.
2. **Confirm the date of your last condition survey**
   Locate the report as well as the date. If neither exists, this is better established now than in November.
3. **Record who is responsible for estate management**
   The return asks for the named person responsible and the qualifications or experience they hold. Documenting this makes the answer straightforward and supports any case for training.
4. **Complete the estate information table**
   Record your position against each record accurately. The gaps are the purpose of the exercise.

5 **Contact your responsible body**

Establish who is coordinating your organisation's return and confirm what they will need from you. Provide the completed table as your starting position.

Questions for Your Responsible Body

All areas of the return are coordinated and reported at responsible body level, although schools will contribute information to support the response. There may be some areas that the responsible body may have a cross over or lead on, such as continuity planning, estate vision and strategy, asset management planning, climate action plans, insurance or Risk Protection Arrangement membership, and governing board oversight.

In many cases there will be both organisational and site-level arrangements in place. Schools should therefore be prepared to describe local practices, priorities, and plans where requested, while recognising that the final response forms part of the responsible body's overall submission.

If You Are Involved in Submitting

This applies principally to single-academy trusts, where the return may be completed by a colleague within your own organisation. Returns are submitted through the Manage Your Education Estate service, accessed via DfE Sign-in. Access requires a DfE Sign-in account, the responsible body added to that account, and the service added to the organisation. This should be arranged well before the window opens in September.

NASPM Support

- **Resource Hub.** Templates and records covering statutory compliance, contractor due diligence, risk assessment and estate information, ready to adapt to your buildings.
- **Live webinar.** A walkthrough of what your responsible body will require from you, with time for questions. Details at naspm.co.uk.
- **Training.** Over 30 virtual courses covering premises, compliance and estates management, each approximately one hour and repeated across the year.
- **Expert guidance.** Email support from experienced premises professionals, with a guaranteed 48 hour response.

Next Steps

Complete the estate information table, send the result to whoever is coordinating your organisation's return, and confirm what further information they will require from you.

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About this guide. Prepared by NASPM, August 2026. This guide has been prepared using the Department for Education published School Estate Management Standards Annual Return guidance and the DfE document Content from the School estate management standards annual return.