NOTE: This is a preparation guide produced by NASPM and is not an official DfE publication.

The Complete Guide to the SEMS Annual Return

A preparation guide for responsible bodies

> This guide is for the people who will complete and submit the School Estate Management Standards annual return this autumn: local authorities, sixth-form colleges, multi-academy and single-academy trusts, and dioceses. For most responsible bodies, preparation should focus on validating and confirming existing estate information rather than undertaking a large-scale data collection exercise.

Many local authorities, multi-academy trusts, dioceses and sixth-form colleges already hold much of the required information within their compliance, asset management, condition, finance and property systems. Approximately three-quarters of the return can typically be completed from these existing central records. School-level engagement is primarily required to validate local arrangements, confirm operational responsibilities and update information that may not be reflected centrally.

A successful submission is therefore less about collecting new information and more about assuring the quality of information you already hold, and ensuring your responses accurately reflect the current position across your estate.

In short

- This is the first SEMS annual return. It is new for 2026, so no responsible body has been through this process before.
- The return has no effect on your DfE capital funding, and there is no penalty or criticism for not meeting the standards.
- Responsible bodies submit. Individual schools, nurseries and other settings never submit the return themselves.
- For most responsible bodies, much of the return can be completed from existing central records. School-level input is mainly needed to validate or confirm details, not to gather information from scratch.
- Reviewing and validating what you already hold, and deciding early where genuine school-level input is needed, is what most affects how smoothly the submission goes.

Why this matters now

2026 is the first year that responsible bodies are required to complete the School Estate Management Standards annual return. While the standards themselves are established, there is no previous annual return against which local authorities, multi-academy trusts or dioceses can benchmark their results.

It is also important to understand what the return is not. DfE has stated that the return is not linked to capital funding allocations and is not intended to be a judgement of organisational performance. Where support is required, the focus is on improvement, peer support and capability development rather than financial consequences.

For most responsible bodies, the first submission should be viewed primarily as a data assurance exercise. Many organisations already hold much of the required information within existing estate management, compliance, governance, finance and asset management systems.

The priority should therefore be to:

- Validate the accuracy and completeness of existing records.
- Confirm that information reflects current arrangements across schools and settings.
- Identify any gaps requiring local school-level confirmation.
- Ensure that submitted responses accurately represent current estate management practices.

School engagement may be required for selected operational matters, but for many local authorities and larger MATs, most of the evidence should already be available through centrally managed systems and records.

An accurate submission, including areas where improvements are still required, will provide a more useful baseline than attempting to present a position that is stronger than the evidence supports.

Who Submits the Return

DfE asks all school responsible bodies 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 settings do not submit the return themselves. The submission must be made by someone in a senior estate management role within the responsible body, and it can be completed either by one person consulting colleagues across the organisation, or by several people each covering their own section.

If your organisation is a multi-academy or single-academy trust

The trust is the responsible body and will have a central estates team that manages the school estate's governance.

If your organisation is a diocese

In dioceses with voluntary-aided schools, the diocese is responsible for completing and submitting the SEMS annual return on behalf of those schools. Individual schools do not submit separate returns. Where information is not available centrally, the diocese should seek input from schools or their governing bodies as necessary.

The level of school engagement required will vary between dioceses. Organisations with mature estate management, compliance and asset information systems may be able to complete much of the return from existing records, with schools mainly asked to validate local arrangements or provide updates where information has changed. Other dioceses may need to undertake more extensive evidence gathering to support their submission.

If your school is voluntary aided but not part of a diocese

Confirm withyourlocalauthoritywhowillbesubmittingthereturnon your behalf before assuming it will be handled centrally.

What the Return Covers

The return is made up of 28 multiple-choice questions across six areas of estate management. For most responsible bodies, the majority of this evidence already sits within central estate, compliance and asset management systems. The table below sets out where the primary evidence for each area is likely to come from, and where school-level validation may still be needed.

Area	Qs	Key themes	Primary evidence source
Strategic estate management	**6**	Vision, strategy, asset management plan, climate planning	**Central records**
Planning and organising your estate resources	**11**	Governance, expertise, roles, resilience, procurement, budgeting	**Central records with local validation**
Understanding and managing your land and buildings	**7**	Condition data, surveys, tenure, estate systems, insurance	**Central records with local validation**
Maintaining your estate	**2**	Compliance and inspection arrangements	**Central records with local validation**
Sustainability	**1**	Sustainability lead	**Central records**
Digital technology	**1**	Digital infrastructure in estate decisions	**School-level confirmation where required**

Responsible bodies should start by reviewing the estate, compliance, asset management and governance information they already hold. The focus should be on validating existing records, resolving any gaps or inconsistencies, and obtaining school-level confirmation only where information is not available centrally or requires local verification. For most responsible bodies, the SEMS annual return will be primarily a validation and assurance exercise rather than a data collection exercise.

Understanding the Levels

The return does not produce a pass or a fail, and there is no single overall score. Each area is assessed separately and 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.

DfE expects organisations to be working towards level 3 where it is available, not to already be there. Two areas work differently, so check this before you submit rather than being surprised by it afterwards. Maintaining your

estate has no level 3 criteria at all, so level 2 is the highest result possible in that area. Sustainability and digital technology have no level 1 or 2 criteria, so both are assessed only as met or not met against level 3.

Estates meeting level 3 in a given area are unlikely to be classed as needing additional support from DfE in that area. That is a helpful thing to know when you are deciding where to focus preparation time, since level 3 is the meaningful threshold in most areas, not level 1.

Who Completes the Return?

The SEMS annual return must be submitted by someone in a senior estate management role within the responsible body. DfE allows organisations to complete the return in a way that best reflects their governance and operating arrangements.

Two approaches may be used:

One person coordinating the response

A senior estates representative completes the return and consults relevant colleagues where additional information or assurance is required. This approach may be suitable where estate, compliance and asset information is held centrally.

Shared completion across specialist teams

Different colleagues contribute to the sections relevant to their responsibilities, such as estate strategy, compliance, sustainability, finance or digital infrastructure, with the final return submitted by a senior estate management representative.

Regardless of the approach adopted, responsible bodies should ensure that responses are supported by appropriate evidence and that any school-level validation is obtained where information is not held centrally or requires local confirmation.

Getting Your Information Ready

The SEMS annual return does not require responsible bodies to submit supporting documentation. However, organisations should ensure that the information used to complete the return is accurate, current and supported by appropriate records where available.

For many local authorities, multi-academy trusts and dioceses, much of the information required will already be available through existing estate management, compliance, asset management, governance and related systems.

Before starting the return, it may be helpful to:

- Review compliance and statutory inspection records.
- Confirm details of individuals with estate management responsibilities.
- Check that condition survey and asset information is current.
- Validate estate, insurance and property information.
- Confirm any site-specific arrangements not held within central systems.

The focus should be on validating existing information, resolving any gaps or inconsistencies, and confirming details locally only where central records fall short, rather than treating this as a fresh information-gathering exercise.

Statutory compliance records

Review your statutory compliancerecords to ensure the information used to complete the return is accurate and current. Where compliance information is managed centrally, validate that records remain up to date. Where records are maintained locally, seek confirmation only where necessary.

The named person and their qualifications

Confirmthat records identifyingthe individual responsible for estate management are current, and that relevant qualifications, training or experience are appropriately documented. For many responsible bodies this information may already be held within central systems or training records.

Condition survey information

Reviewavailable conditionsurvey information, including Condition Data Collection records and any locally commissioned condition surveys. Confirm that survey information remains sufficiently current to support responses within the return.

Estate and digital information systems

Confirm that keyestate information,including asset, compliance and property records, can be readily accessed to support completion of the return. Information may be held within dedicated estate management systems, compliance platforms or other maintained records.

Common Barriers to Meeting the Standards

After submitting the return, organisations may be asked to identify barriers that make it more difficult to meet the School Estate Management Standards. These barriers help provide context to the responses submitted and help DfE understand the challenges faced by responsible bodies across the sector. DfE's own list of barriers is:

- Challenges associated with the size or complexity of the estate
- Conflicting organisational priorities
- Difficulty accessing specialist advice or contractors
- Lack of available training or professional development for estate staff
- Lack of data or information about the estate
- Lack of estate management expertise
- Limited staff capacity or resources
- Uncertainty about how to meet the standards
- Other, with space to add detail

Responsible bodies should describe any barriers accurately and honestly. The information provided helps ensure that the return reflects the organisation's current circumstances and contributes to DfE's understanding of common issues affecting estate management across the education sector.

What Happens After You Submit

After submission, the annual return provides responsible bodies with an indication of the levels achieved across the School Estate Management Standards areas. The results are intended to help organisations understand their current position against the standards and identify areas for further development.

Responsible bodies will also have the opportunity to review their results, provide feedback and identify any barriers that may affect their ability to meet the standards. This information helps provide context to the return and contributes to DfE's understanding of estate management challenges across the sector.

The results are not tied to funding decisions, and DfE has been clear this is not a judgement of performance. Its purpose is to establish a baseline understanding of estate management maturity, and to help identify where further support or improvement activity may be useful.

An accurate return, including areas where improvement is still required, is likely to be more valuable than attempting to demonstrate compliance beyond what current evidence supports.

Next Steps

The SEMS annual return is intended to help responsible bodies understand how their current estate management arrangements align with the School Estate Management Standards. As the first annual return, organisations should focus on ensuring that responses are accurate, evidence-based and reflective of current practice across their estate. The return is completed by the responsible body and may be informed by schools where additional input is required. It is not linked to funding and does not require supporting documents to be uploaded.

Response Planner

A structured approach to assigning responsibility for different sections of the return, tracking progress and ensuring that all relevant information has been reviewed before submission. This may be particularly useful where multiple teams contribute to the response, such as estates, compliance, finance, sustainability and digital infrastructure functions.

Multi-Setting Validation Pack

A structured tool for responsible bodies that need to validate or update information across multiple schools or settings. It can help collect consistent responses where information is not available centrally or where local confirmation is required.

For many local authorities, multi-academy trusts and dioceses, much of the information required for the return will already be held within estate management, compliance, governance and related management systems. In these cases, only targeted school-level validation may be necessary. The purpose of the validation process is to confirm the accuracy and currency of what you already hold, not to start gathering it from scratch.

DfE Support and Guidance

Before completing the return, responsible bodies should review the School Estate Management Standards and any associated DfE guidance. DfE also provides information about the annual return process, including guidance materials and webinar support. Details and timings should be confirmed through official DfE channels.

Practical Preparation Actions

Before the submission window opens, consider:

- Reviewing existing estate, compliance and asset management information.
- Validating records that support responses to the return.
- Confirming any site-specific arrangements that may not be reflected in central systems.
- Resolving known information gaps or inconsistencies.
- Agreeing internal ownership for each section of the return.
- Ensuring the final submission is reviewed and approved by the responsible body before submission.

Key message

For most local authorities, multi-academy trusts and dioceses, preparation for the SEMS annual return should primarily be viewed as a validation and assurance exercise rather than a large-scale information gathering exercise. The focus should be on reviewing existing records, confirming their accuracy and obtaining local verification only where necessary.

NASPM support

- **Resource Hub.** Templates and records covering statutory compliance, contractor due diligence, risk assessment and estate information, ready to adapt to your buildings.
- **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.

The submission due date and DfE webinar date are both still shown as TBC on the DfE service at the time of writing. Nothing with a specific date should go out externally until DfE confirms them.

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

This guide provides general information to assist responsible bodies with preparation and is intended as a practical preparation guide, to be read alongside official DfE guidance. It is not legal or professional advice on the obligations of any individual organisation, and it does not replace the School Estate Management Standards. Responsibility for the accuracy of a submitted return rests with the responsible body.