

# Estates and Capital Manager

## Candidate Pack

**Salary:** NJC MAT 10 SCP 36-39 (£47,181—£50,269)

**Contract Type:** Permanent

**Contract Term:** 37 hours per week, All year round

**Location:** Palace Fields Primary School, Badger Close,  
Runcorn, WA7 2QW



# About the Trust



Our work at The Heath Family Trust is rooted in our mission, our values and in a commitment to giving our pupils the best start in life. We collectively hold ourselves and each other to the highest standards. You will thrive in an environment that values **clarity** in communication and purpose, fosters **collaboration** across all levels, and champions a culture of **accountability**.

**Academic rigour** is our priority. We achieve this by ensuring our work is thorough and of the highest intellectual integrity.

## ✓ WHY WE EXIST: A SHARED PURPOSE

To empower our children to overcome barriers, be able to compete with the best, and shape the future.

## ✓ HOW WE BEHAVE: THE HEATH FAMILY VALUES

**With kindness:** we look out for each other.

**With integrity:** we do the right thing.

**With tenacity:** we do what it takes.

## ✓ WHAT WE DO

We lead schools in the North West to maximise attainment and nurture confident, resilient and compassionate individuals.



# We Offer:



- ✓ An opportunity to work in a values driven organisation and be part of a welcoming and dedicated team
- ✓ Support and training so that you can flourish in your role
- ✓ Recognition of the importance of a work life balance and employee wellbeing
- ✓ Car lease scheme
- ✓ Cycle to work
- ✓ Appropriate pension scheme
- ✓ Employee Assistance Programme (EAP)



# JOB TITLE

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## Salary

NJC MAT 10 SCP 36-39 (£45,718—£50,269)

## Contract Type

Permanent

## Hours

37 hours per week

## Closing Date

The Heath Family is centred on raising standards of achievement and aspirations for all students to the highest standard by developing and nurturing both primary and secondary academies.

We are part of a local strategy focussing on increasing choice and diversity in education encompassing innovative approaches to curriculum, teaching and learning, leadership and management.

We place an emphasis on talent management, developing leaders and enhanced professional development for all staff. We also extend our impact in terms of raising standards of education for more young people and help break the cycle of underachievement and low aspirations which is a feature of significant parts of the Merseyside and Cheshire area.

The Heath Family Trust are seeking a dedicated **Estates and Capital Manager** to oversee the maintenance, development and safety of all properties across the trust's academies, ensuring buildings support educational goals, comply with regulations and are cost effective.

Under the guidance of the Director of Infrastructure , the Estates and capital manager will be responsible for managing capital projects (refurbishments, extensions, new builds), leading asset and facilities strategies, managing budgets, coordinating external consultants and contractors, and liaising with stakeholders to maintain high-quality learning environments.



# Job Description

## Key Responsibilities

- Being accountable for the delivery of all sitewide construction activities and manage capital projects, from initial brief development through to completion, including budget management, procurement, and contractor coordination with oversight from the Director of Infrastructure.
- Working with the Compliance Manager to ensure all academies meet statutory and regulatory requirements across the trust's estate.
- Contribute to and lead the development and implementation of the trust's overall estates strategy, asset management strategy, climate action plans and energy-saving initiatives.
- Develop planned maintenance programs based on condition surveys and manage the proactive upkeep of school buildings and grounds.
- Work closely with headteachers, academy premise teams, architects, consultants, and contractors to deliver projects and maintain estate standards.
- Develop preliminary cost estimates for projects, monitor project expenditure, and ensure that projects are delivered to budget and provide value for money.
- Collating information from academies and producing relevant reports for trust leadership, meetings and statutory reporting.
- Proactively support the Trust in providing a high quality, value for money, safe environment for staff, students and visitors.
- Maintaining accurate and a comprehensive awareness of the range of building conditions throughout the Trust estate in order to inform capital funding expenditure under HM Government's SCA and DFC funding streams and utilising independent reports/surveys where necessary for the same
- Identify and develop potential micro as well as Trust wide opportunities for maximising the impact of capital funding, including monitoring current capital expenditure as well as revenue generation eg. Grants and funding streams
- Lead the procurement process for the procurement of key strategic relationships eg. for specialist M&E projects or specialist estates consultants and then be accountable for the delivery of services from the same
- Provide and lead on effective financial management and accounting control, in conjunction with the finance service, for all capital projects ensuring that financial budgets, build quality, safety and resources are monitored, controlled and are delivered on time
- Establish and maintain proactive constructive relationships with key academy and external staff, and produce the required reports for the DfE, auditors and Executive Leadership Team in a timely and accurate manner
- Support Trust staff in maintaining compliant and safe environments
- Support the Director of Infrastructure with the development and implementation of the Estate Strategy
- Produce accurate Net Capacity Assessments and option appraisals around capacity and lead on the provision of similar information for pupil place planning queries as may be needed from time to time

# Job Description

- Manage the monitoring and safe delivery of key, large value capital schemes
- Develop templates for and be accountable for 'lessons learned' and subsequent feedback reports in relation to capital projects, whether Trust funded or by third parties.
- Lead on the Trust's strategy to reduce carbon, environmental impact, revenue and energy costs and then the implementation of same alongside curriculum support as may be required from time to time
- Development of project documentation including outline briefs, project initiation documents, financial appraisals, project execution plans, preparation of tender documentation, development of technical drawings and specifications including contract administration. This will also include the delivery of project progress reports for the Director of Infrastructure
- Development and management of project programmes, risk registers and project trackers.
- Ownership of project meetings including taking meeting minutes and managing change control on projects within allocated budgets.
- Be aware of and support difference and ensure equal opportunities for all
- Contribute to the overall ethos/work/aims of the Trust
- Develop constructive relationships and communicate with other agencies/professionals
- Participate in training and other learning activities and performance development as required
- Such other duties as may be commensurate with the role/grade of post and may be reasonably required from time to time.
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## **Regulatory Compliance:**

- Staying informed about and interpreting relevant laws, regulations, and policies affecting the Trust and ensuring the schools within the Trust comply with these.
- Identifying potential areas of compliance vulnerability / risk and developing action plans for mitigation.
- Collate and use robust management information to proactively manage the estates portfolio – including maintaining completeness and integrity of data; reviewing for trends and opportunities as well as providing strategic leadership on key themes and sharing and demonstrating best practice from around the Trust and the wider sector.
- Ensure effective Health and Safety governance, processes, and reporting Trust wide in relation to the area of works.
- Ensure that contractors have been through due diligence and all certification, insurances and safeguarding checks are complete.



# Job Description

## **Health and Safety:**

- Ensuring compliance with health and safety regulations
- Ensure the implementation of health and safety procedures are followed by contractors
- Monitoring health and safety practices of contractors
- Coordinate contractors and suppliers to ensure a positive culture for health, safety, and the environment

## **Policy Development and Implementation:**

- Assisting in the development of policies
- Implementing internal policies and procedures to ensure compliance
- Reviewing and assisting in updating policies regularly to reflect changes in regulations

## **Data Protection:**

- Ensuring compliance with data protection regulations (e.g. GDPR)
- Protecting the privacy of student and staff data

## **Communication and Collaboration:**

- Collaborating with other departments and external agencies.
- Working with legal counsel on Health & Safety matters relating to capital and estates matters.

## **Other:**

- Assessing VFM against contracts and regular reviews.
- Keeping supplier checks updated and details available on the in-house system.
- Assist in development and implementation of PQQ checks on providers.
- Assistance with PPM schedules and organisation.
- Show a commitment to diversity, equal opportunities, and anti-discriminatory practices.
- Show a commitment to ensuring that children and young people learn in a safe environment. Participate in relevant and appropriate training and development as required.
- Solid experience in estates management, preferably within the education sector.
- Strong project management skills, including planning, budgeting, and risk management.
- Knowledge of health and safety regulations and their application in an educational context.
- Experience managing external consultants, contractors, and building projects.
- Ability to liaise effectively with various stakeholders, including professional advisors and school leaders.
- Commitment to safeguarding children and young people.

# Job Description

## Special Features

The postholder will be required to travel to any schools within The Heath Family (NW).

## Supplementary Support

- Be aware of, and comply with, policies and procedures relating to safeguarding, health and safety, confidentiality, and data protection, reporting all concerns to an appropriate person.
- Be aware of and support difference and ensure all students and staff have equal access to opportunities to learn and develop.
- Contribute to the overall ethos/work/vision and values of The Heath Family (NW)
- Attend and participate in meetings outside of normal working hours.
- Participate in training and other learning activities as required.
- Recognise own strengths and areas of expertise and use these to advise and support others.
- Other duties agreed from time to time by the post holder with their Line Manager.
- Play an appropriate part in safeguarding procedures, such as relating relevant factual information and recording/reporting disclosures to the designated teacher/relevant professional.

**This job description is not necessarily a comprehensive definition of the post. It will be reviewed at intervals, and it may be subject to modification or amendment at any time after consultation with the holder of the post.**



# Person Specification

## PERSON SPECIFICATION – Compliance Manager

CATEGORY/ITEM	ESSENTIAL	DESIRABLE
<b>Qualifications, Knowledge &amp; Experience</b>		
• Have relevant experience of Health and Safety incl. CDM and building regulations and their practical application	X	
• Membership of a relevant professional institute	X	
• Extensive knowledge of construction and FM environments	X	
• A strong understanding and practical experience of managing estates and capital projects relating to them	X	
• A proven track record within a multi-site, multi-stakeholder environment	X	
• A proven track record for well managed and robust procurement at all values including producing specifications, terms and conditions, contract management and management post-completion	X	
• Experience of working to Policy and Procedures	X	
• Organised with good attention to detail and experience of managing electronic and paper filing systems	X	
• Experience of working with third party service providers	X	
• Strong leadership and people management skills	X	
• Understanding of safer recruitment in a school context		X
• A proven track record in estates strategy and pupil capacity assessments		X
• Experience of working in a school or other educational setting	X	
<b>Skills, Abilities and Personal Qualities</b>		
• Ability to prioritise tasks, manage time effectively and meet deadlines to accommodate emerging new priorities and technologies	X	
• Ability to cope effectively in a busy, demanding role	X	
• Proven ability to maintain confidentiality in all aspects of work	X	
• Ability to manage stakeholders and third-party service providers	X	
• Excellent communication skills both oral and written	X	
• Able to provide a high level of customer service to stakeholders	X	
• Able to use own initiative within a busy, diverse team	X	
• Have a clear view of what constitutes effective management of staff and demonstrate practice consistent with the objectives and ethos of the school.	X	
• Competent in the use of Microsoft Office applications including Excel and Word	X	
• Ability to read and understand CAD and complex/commercial data	X	
• Flexible approach to working hours and positive attitude to work	X	
<b>Suitability to work with children</b>		
• Enhanced DBS clearance is required for this position	X	

# How to Apply

Applicants must have relevant qualifications and experience related to this role, please ensure that you meet the person specification before applying.

We are committed to equality of opportunity for all staff and applications from individuals are encouraged regardless of age, disability, sex, gender reassignment, sexual orientation, pregnancy and maternity, race, religion or belief and marriage and civil partnerships.

Appointment is subject to a satisfactory enhanced disclosure from the Disclosure and Barring Service and references. The Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff to share this commitment.

We ask that you do not send CVs. Please email your completed application and self-disclosure form to [recruitment@theheathfamily.org.uk](mailto:recruitment@theheathfamily.org.uk).

**Application closing date: 31st October 2025**

**Shortlisting Date: 3rd November 2025**

**Interview Date: 7th November 2025**