Trust Estates Manager

Candidate Application Pack

March 2026

James Montgomery Academy Trust

6th March 2026

Letter from our CEO

Dear Prospective Applicant,

Thank you for your interest in joining James Montgomery Academy Trust. We are delighted that you are considering a role within our organisation, and we hope the information provided encourages you to take the next step toward becoming part of our dedicated and growing Trust community.

Established in 2016, James Montgomery Academy Trust has grown into a large and ambitious primary trust serving communities across South Yorkshire. Our vision is clear and consistent: our schools are child-centred and distinctive, delivering excellence in education, sharing best practice, and building aspiration.

At JMAT, everything we do begins with children. We consistently put children at the heart of decision-making, ensuring that every child receives exceptional educational experiences regardless of background or starting point. We are committed to being inclusive, valuing the individuality of each school, and maintaining environments in which all pupils feel safe, supported, and able to thrive.

Our Trust encompasses a family of diverse and distinctive primary schools, each with its own identity and strengths. While every academy retains its uniqueness, all share a commitment to our core principles:

- Championing school individuality
- Continually improving through innovative, research-driven practice
- Delivering a rich, contextualised and ambitious curriculum
- Providing high-quality inclusive practice and purposeful learning environments
- Supporting pupils to achieve their aspirations and contribute positively to their local and global communities
- Developing a reflective, knowledgeable and highly skilled workforce
- Fostering positive, productive partnerships

Our values are further reflected in our strong culture of inclusion, equality, safeguarding and wellbeing, which permeates every aspect of school and Trust life. This child-centred ethos is widely recognised and celebrated throughout our communities.

We are proud to collaborate closely with families, colleagues, partners, and wider professional networks to strengthen practice and secure the very best outcomes for children. Our staff teams are dedicated and have aspirational qualities which we actively seek in those who join us. The Trust offers excellent opportunities for professional development, wellbeing support and career progression, and we are committed to being an employer of choice within the sector.

Further details about the role can be found in the Job Description later in this document. We look forward to receiving your application and exploring how you can contribute to the continued success of our Trust.

Mr David Silvester

CEO James Montgomery Academy Trust

Trust Estates Manager

Job Description

Post:	Trust Estates Manager [Permanent Post]
Hours:	Full Time [52 weeks]
Responsible to:	CFO / CEO / Trust Board
Location:	Working across all school sites
Scale:	PO15 (43-46) £54,495 - £58,165
Liaising with:	All Trust stakeholders
Start date:	To be agreed with the successful candidate

Purpose of the Job

The Trust Estates Manager will provide strategic leadership and operational oversight of the James Montgomery Academy Trust estate, ensuring it is future-ready and aligned with the Trust's priorities. Reporting to the CFO/CEO and operating as a key member of the Trust Central Team, the postholder will lead the development and delivery of the Trust's strategic estates plan. They will take a central role in managing capital projects and overseeing the procurement of facilities management contracts, ensuring all activity meets statutory, regulatory and best-practice expectations across estates, facilities, health and safety, and compliance.

The postholder will be responsible for maintaining high-quality, safe and well-presented learning environments across all Trust sites.

This is a pivotal role suited to an individual with strong project management capability, excellent communication skills and a commitment to delivering outstanding service to our schools, staff and pupils.

Key Responsibilities

- Act as the Trust's Competent Person for Health and Safety, supported by external health and safety service providers as required.
- Provide expert, professional estates advice and ensure the delivery of an effective and efficient estates support service across the Trust.
- Contribute to the ongoing development and review of the Trust Strategic Estates Plan, working closely with the CFO/CEO and Trust Compliance Leads to ensure it is compliant, sustainable and financially viable.
- Promote and support a collaborative approach to delivering the Trust Estates Plan, ensuring consistent standards and continual improvement across all Trust sites.
- Support schools operating under existing PFI contracts and lead the estates-related elements of PFI expiry planning to integrate these sites effectively into the Trust's wider estate's structure.
- Lead, coordinate and manage capital and estates projects funded through School Condition Allocation (SCA), Devolved Formula Capital (DFC) and other relevant grant streams.
- Develop, implement and monitor estates-related policies and procedures to ensure effective estates management aligned with DfE Good Estate Management for Schools (GEMS) guidance.

- Support the identification and planning of future estates and health & safety requirements, ensuring proactive and forward-looking estate development.
- Lead on engagement with external estates consultants and service providers, ensuring effective communication and prioritising resolution of any health and safety concerns.
- Maintain accurate and up-to-date documentation for all estates systems and services, including oversight of the IAM Compliant system.
- Work closely with the Trust Finance Team to ensure best-value procurement of estates-related services, contracts and supplies within agreed budgets.
- Be responsible for all site and building compliance throughout the Trust, through collaboration with the Trust Compliance Team.

Strategic Estates Leadership

- Work collaboratively with the CFO, Trust Strategic Team and wider Central Team to shape and maintain the Trust's Estates Vision and Strategy, ensuring alignment with Trust priorities and DfE Good Estate Management for Schools (GEMS) guidance. Lead on implementing the strategy and providing clear monitoring and reporting.
- Provide leadership, coordination and professional guidance on all aspects of estates development, including estate condition, risk, and capital planning. Offer timely and informed advice to the Trust Strategic Team, schools, and the Trust Board to support high-quality day-to-day operations.
- Develop and maintain comprehensive asset management plans, including oversight of condition surveys, lifecycle and long-term maintenance planning, and the creation and management of capital investment programmes.
- Work with the CFO and Trust Strategic Team to support strategic planning for effective site operation and utilisation, including considerations of capacity, future growth, estate expansion or rationalisation.
- Oversee the development, implementation and review of site security policies and procedures, ensuring consistent, safe and secure environments across Trust sites.
- Manage delegated external estates-related contracts, ensuring effective performance, adherence to Trust policy, and delivery of value for money.
- Oversee the Trust's approach to increasing lettings and community use of facilities, working with school leaders and site teams to maximise appropriate income opportunities.
- Direct and support the Trust Compliance Leads to ensure that all statutory and non-statutory checks, inspections and servicing activities are completed on time, accurately recorded, and meet required standards.

Wider Estates, Including Project and Contract Management

- Work collaboratively across the Trust, including with staff employed directly and those engaged through third-party contractors, to support the delivery of the Trust's strategic estates aims, providing guidance, expertise and support as required.
- Contribute to the performance management and professional development of Trust Compliance Leads, supporting a culture of continuous improvement and high-quality service delivery.
- Provide clear project direction across the Trust, ensuring all work is accurately scoped, well-planned, and supported by effective risk identification and issue resolution.
- Lead and where necessary, support the delivery of capital projects, refurbishments and urgent/emergency works, ensuring programmes are efficiently managed, compliant with statutory and regulatory requirements, and completed to the required quality standards.
- Through collaboration with the Finance Team, secure procurement through transparent and competitive tendering processes, ensuring compliance with Trust policies, financial regulations and relevant procurement legislation.
- Ensure appropriate insurance and risk-management arrangements are in place, working within Trust frameworks and with external providers to proactively mitigate project and operational risks.
- Monitor, document and escalate any compliance concerns arising during project delivery, ensuring timely and effective risk management throughout the lifecycle of each project.

- Ensure thorough project completion and handover, including the management of guarantees, warranties and defect-liability periods, with all documentation accurately recorded and maintained.
- Develop and maintain effective contractual relationships with contractors, consultants and service providers to support high-quality estates and project delivery across the Trust.
- Lead the development and implementation of the Trust's energy management, carbon-reduction and environmental compliance strategy, ensuring alignment with Trust sustainability objectives and relevant government guidance.
- Oversee the Trust's utility monitoring and energy-data reporting systems, and lead on the development of reduction plans to improve energy efficiency and support sustainability goals.

Health, Safety and Compliance

- Act as the Trust's Health and Safety Competent Person, providing professional advice on the development, implementation and review of health and safety policies and procedures.
- Support the Trust Compliance Leads to ensure full statutory compliance across all Trust sites, including, though not limited to, fire safety, asbestos management, water hygiene, gas safety, electrical safety and other regulated areas.
- Ensure the Trust Health and Safety Policy remains current, and work with school leaders and their site teams to ensure consistent implementation and compliance across all schools.
- Work with the Trust Strategic Team and school leaders to ensure Business Continuity Plans and Critical Incident Plans are up to date, robust and regularly reviewed.
- Collaborate with the Trust Compliance Leads to implement and monitor Trust risk assessments, ensuring effective and consistent processes for monitoring, recording and escalating concerns.
- Work with school leaders and site teams to embed a strong, consistent culture of health and safety across the Trust, promoting high standards and proactive risk management.
- Act as the lead contact for external inspections, audits, incident investigations and regulatory engagement, including the management and reporting of RIDDOR incidents where required.
- Ensure that termly Trust Health and Safety meetings are held, with clear actions recorded and followed up promptly to drive continuous improvement.

Financial Management

- Work collaboratively with the CFO and Finance Team to develop, manage and monitor estates budgets**,** ensuring accurate forecasting and providing regular reports on financial performance.
- Identify and implement opportunities for efficiencies, sustainability initiatives, income generation and improved value for money**,** ensuring resources are used effectively across the Trust estate.
- Lead or support the preparation and submission of bids for external funding streams**,** including decarbonisation programmes, capital grants and other relevant funding opportunities.

Estates Systems, Reporting and Information Management

- Produce clear, accurate and timely reports for the Trust Strategic Team, Trust Board and other stakeholders, providing insights that support effective decision-making and strategic planning.
- Effectively use IAM Compliant to ensure robust, secure and compliant record-keeping systems**,** aligned with cybersecurity standards, Trust policies and GDPR requirements.

General

The postholder's duties must be carried out in full compliance with the Trust's Safeguarding Policies, Equality Policies, Information Security Policies, Financial Regulations, the Health and Safety at Work Act, and all other relevant Trust policies and statutory requirements.

The postholder will:

- Promote the ethos, vision and values of the Trust in all interactions and decision-making.

- Maintain ongoing professional development, keeping up to date with relevant legislation, sector guidance and best practice.
- Attend, participate in and, where appropriate, lead meetings, training sessions and working groups as required.
- Respond proactively to estates-related developments, assessing their impact on the Trust and its academies and adapting practice where necessary.
- Exercise initiative and professional judgment in delivering delegated duties, escalating complex or high-risk issues when appropriate.
- Undertake other duties commensurate with the role, including occasional work outside normal hours where required to meet operational needs.

These duties and responsibilities should not be regarded as exhaustive. The postholder may be required to undertake additional tasks reasonably assigned and commensurate with the grading and general nature of the post. The Job Description and the allocation of responsibilities will be reviewed annually and may be amended at any time by the CEO following appropriate consultation.
The postholder must, at all times, comply with the Trust's Code of Conduct.

Safeguarding

At James Montgomery Academy Trust, safeguarding is at the heart of everything we do. We are fully committed to safeguarding and promoting the welfare of children**,** and we expect all staff, volunteers and those working in partnership with us to share in this commitment. Our approach reflects the principles and statutory expectations set out in Keeping Children Safe in Education (KCSIE) 2025 and underpins our vision for safe, nurturing and ambitious learning environments across all our academies.

All appointments are made following a rigorous safer recruitment process, including all required pre-employment vetting checks such as an enhanced DBS check**,** identity and right-to-work verification, reference checks and, where applicable, children's barred list, prohibition, Section 128 and overseas checks, in line with KCSIE requirements.

As an organisation registered with the Disclosure and Barring Service under the Rehabilitation of Offenders Act 1974 (Exceptions) Order**,** we fully comply with the DBS Code of Practice and are committed to treating all applicants fairly. A criminal record will not necessarily prevent an individual from working with us; decisions are always made in relation to the specific role and the nature, relevance and context of any information disclosed.

If you are shortlisted, you will be asked to complete a Criminal Records Self-Declaration Form**.** Any information disclosed will be considered carefully, discussed openly and managed confidentially prior to any conditional offer of employment. Failure to disclose relevant information when asked may lead to the withdrawal of an offer or dismissal.

We are committed to ensuring a positive, fair and inclusive recruitment experience for all applicants and to protecting the secure handling of data in line with the DBS Code of Practice and data protection expectations confirmed within KCSIE 2025.

Trust Estates Manager

Person Specification

James Montgomery Academy Trust is committed to appointing the best possible candidates to support the safe, efficient and compliant operation of our school environments.

The successful candidate will prioritise the safety, welfare and experience of pupils, staff and visitors through high standards of site management and professional conduct. They will demonstrate honesty, integrity and accountability, maintaining up-to-date knowledge relevant to estates, health and safety, compliance and safeguarding. They will take a proactive, reflective approach to their work, seeking continuous improvement and responding effectively to operational needs.

The postholder will build positive, professional relationships across the Trust and work collaboratively with leaders, staff, contractors, and external partners to ensure our buildings and grounds are well-maintained, secure and supportive of high-quality education. Their contribution will help ensure the best possible outcomes for pupils and the wider school community through the provision of safe, functional and welcoming school sites.

Education and Qualifications			
	Essential	**Desirable**	**Source** A- application I - interview R - references
Degree-level (Level 6) qualification in Estates Management, Building Surveying, Facilities Management, Construction, Health & Safety, or a related discipline	✓		A I, R
NEBOSH General Certificate *or* IOSH Managing Safely, or a commitment to achieve within 12 months		✓	A I, R
Full UK driving licence and ability to travel between Trust sites	✓		A I, R
Evidence of ongoing professional development relevant to estates, compliance or facilities management	✓		A I, R
Project Management qualification, such as PRINCE2, APM, or similar.		✓	A I, R

Experience, Knowledge and Skills			
	Essential	**Desirable**	**Source** A- application I - interview R - references
Strong understanding of statutory estates and facilities compliance requirements, including fire safety, asbestos management, water hygiene, electrical safety and gas safety.	✓		A I, R
Experience working in an estates or facilities management role at management level, including responsibility for line management and staff development.	✓		A I, R
Demonstrable experience working with third-party suppliers, contractors and internal stakeholders to deliver large, complex or multi-site projects.	✓		A I, R
Significant experience managing budgets and contracts, ensuring value for money and compliance with financial procedures.	✓		A I, R
Experience managing procurement processes, including tendering, evaluation and contract award.	✓		A I, R
Experience developing or contributing to asset management plans and planned maintenance schedules.	✓		A I, R
Excellent planning, organisational and problem-solving skills, with the ability to manage competing priorities effectively.	✓		A I, R
Knowledge of sustainability, energy efficiency and carbon reduction approaches relevant to estates management.	✓		A I, R
Experience working within an education or wider public-sector estates environment.		✓	A I, R
Experience delivering estate strategies or environmental improvement programmes within a multi-site organisation.		✓	A I, R
Experience of working with PFI contracts, including operational management, contract monitoring or PFI expiry planning.		✓	A I, R

Skills, Abilities and Personal Attributes			
	Essential	**Desirable**	**Source** A- application I - interview R - references
Ability to build positive, professional and effective working relationships with staff, leaders and stakeholders at all levels across the Trust, as well as external partners and contractors.	✓		A, I, R
Ability to simplify, interpret and present complex technical, estates or compliance information clearly and concisely to a range of audiences, including non-specialists.	✓		A, I, R
Strong influencing, negotiating and diplomacy skills, with the ability to motivate others, secure cooperation and appropriately challenge where required.	✓		A, I, R
High level of accuracy and attention to detail, with the ability to manage sensitive information discreetly and professionally.	✓		A, I, R
Ability to quickly learn and adapt to new systems, software, digital tools and emerging technologies relevant to estates and compliance.	✓		A, I, R
Ability to interpret legislation, technical guidance, regulatory frameworks and compliance documentation, and translate this into effective operational practice.	✓		A, I, R

Flexible and proactive approach to work, demonstrating initiative, problem-solving ability and strong organisational and leadership skills.	✓		A, I, R
Highly organised approach to planning and prioritising workload, able to manage competing demands and adjust plans to meet operational objectives.	✓		A, I, R
A strong commitment to the values, ethos and vision of James Montgomery Academy Trust.	✓		A, I, R
Commitment to safeguarding and promoting the welfare of children, and to following all Trust policies, procedures and expectations relating to child protection.	✓		A, I, R
Experience in delivering staff training or presenting technical information to groups in a clear and engaging way.		✓	A, I, R
Ability to lead cross-Trust working groups or project teams, supporting collaboration and shared practice across multiple sites.		✓	A, I, R

Additional Essential Criteria

- Fully supportive references.
- Full enhanced DBS clearance.

Application Process

This section sets out the stages involved in applying for this role, from the submission of application materials to the final selection. It provides clarity on requirements, timelines and decision-making to ensure a fair and consistent approach in line with Trust recruitment procedures.

Prospective applicants who would find it helpful are welcome to contact the Trust to arrange an informal discussion before submitting their application. Please do so by getting in touch via the following email info@jmat.org.uk

To apply for the post, please complete the relevant application form.

Application window closes:	**23rd March 2026 Noon**
Shortlisting Date:	**23rd March 2026**
Provisional Interview Date:	**25th / 26th March 2026**

Thank you for taking the time to review this application pack. We hope the information provided supports you in deciding whether this role is the right opportunity for you. We look forward to receiving your application and welcoming candidates who share our commitment to maintaining safe, high-quality environments across the Trust.