



Estates Policy

2024/2025 Academic Year

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1. Policy Statement

Spa Education Trust is committed to ensuring safe, secure and well-maintained learning and working environments for its students, staff, visitors and stakeholders.

2. Scope and purpose

To effectively manage the premises management obligations of our Trust and comply with all relevant government legislative requirements. To ensure the teaching and learning environment is safe and welcoming at all times.

3. Introduction

3.1 Spa Education Trust comprises of two academies. Some academies within the Trust at times will require investment relating to their individual buildings and such works will, where appropriate, be supported via the Capital fund.

3.2 The buildings are assets that need to be maintained in order that they may function effectively and efficiently in supporting the delivery of education. Any deterioration in the physical condition of the building, due to a lack of maintenance, can adversely affect service delivery and also create legal, health and safety and reputation issues for the Trust, and additional capital investment due to deteriorations.

3.3 The maintenance of buildings is critical to the proper management of assets and the overall management of capital receipts in achieving the Trust's objectives.

4. Scope of building maintenance

4.1 Maintenance can be defined as the combination of all technical and administrative actions, including supervision, intended to retain an item, or restore it, to a state in which it can perform a required function.

4.2 This policy applies to the maintenance of all academies within the Trust's owned assets and, for clarity, a building asset is defined as: 'any roofed structure enclosing space and intended for use as a shelter or for recreation or educational functions'.

4.3 Building maintenance activities include all work on existing building assets, including utility services and external infrastructure within the area of the site that is undertaken to achieve the following objectives:

- To retain the asset in a condition in which it can perform its intended function
- To prevent deterioration and failure or extend the life of the asset
- To restore to correct operation within agreed specification
- To restore physical condition to an agreed specification
- To recover from structural and service failure
- To obtain accurate and objective knowledge of physical and operating condition, including risk and financial impact for the purpose of maintenance
- Partial equivalence replacement of components of the asset

4.4 Work excluded from 'building maintenance':

- Improvements and upgrading to meet new service capacity or function

- Refurbishment to new condition to extend the capacity of the asset
- Optimising capital receipts on disposal of building assets where additional income exceeds expenditure

4.5 The key outcomes to be achieved from undertaking maintenance are:

- Functional and operational requirements of the working environment
- The physical condition and efficient operation of assets is kept to a standard appropriate to their service function and value to the community i.e. school
- All statutory and technical requirements e.g. health, safety, security and reliability

5. Objectives

5.1 The key objectives of the Estates Policy are to:

- Specify minimum requirements for the management of maintenance
- Ensure that building assets are adequately maintained
- Ensure that the buildings are managed in line with regulatory, statutory and legislative compliance
- Ensure that the risks to the academies within the Trust are effectively managed
- Ensure that health, safety and security objectives are met
- Ensure effective maintenance of operational level
- Ensure that the Trust has necessary information for the monitoring, maintenance, condition and performance of buildings assets at an organisational level and
- Ensure that there is adequate information at operational level to undertake maintenance including the ability to review new policies and strategies, analyse lifecycle costs, plan for replacements and upgrades, and improve the efficiency and effectiveness of maintenance

5.2 By adopting this approach, the Trust will agree 'guiding principles' for the management of maintenance and repair of Trust owned assets in order to ensure compliance with regulation and legislation.

6. Policies and standards

The following summarises the structure proposed for the effective and efficient management of building maintenance within the Trust.

6.1 Building maintenance

6.1.1 This sets out the Trust approach to the maintenance and support of a 'buildings maintenance plan' so that the maintenance objectives can be achieved.

6.1.2 The Estates Policy is based upon the following criteria in order of priority:

1. Health and safety issues
2. Statutory requirements e.g. security, fire, gas, electrical, access etc.
3. Structural integrity of all Trust owned building stock
4. Ensuring that all academies are maintained at a suitable standard to reflect their purpose
5. Building fabric, except for unoccupied assets and those identified for disposal
6. Maintenance of unoccupied assets and those identified for disposal

6.2 Maintenance standards

6.2.1 Maintenance standards are established to ensure that assets are maintained to an appropriate condition and in an efficient operation to support education delivery. The standards will be implemented in accordance with strategy and legislative requirements, best practice and British Standards, Codes of Practice etc.

6.3 Preventative maintenance

6.3.1 Preventative maintenance is part of the planned or scheduled maintenance programme of our Trust. The purpose of the scheduled maintenance programme is to ensure the Premises Team anticipate maintenance requirements and make sure they are addressed in the most cost-effective manner.

6.3.2 The preventative maintenance programme focuses on major systems that keep the properties in operation. Systems covered by the preventative maintenance programme include (but not limited to):

- Fire alarm
- Emergency lighting
- Exhaust / extraction
- Electrical
- Gas
- Domestic water
- Sanitary drains
- Mechanical equipment

6.3.3 A specific programme will be developed for each system. This programme shall include a list of the scheduled service maintenance for each system and the frequency and interval at which that service must be performed.

6.3.4 The equipment and materials required to perform the service will be listed so that they will be on hand when needed. An assessment of the skills or licensing needed to perform the tasks will also be made to determine if an outside contractor must be used to perform the work.

6.3.5 The preventative maintenance schedule must be updated each time a system is added, updated or replaced.

6.4 Life safety systems

6.4.1 The Trust shall have a comprehensive programme for maintenance of life safety systems to ensure that they will be fully functional in the case of an emergency. The Premises Manager will be responsible for the development and implementation of a schedule that includes the inspection, servicing and testing of this equipment. The equipment included in the plan includes the following:

- Fire alarms / fire alarm systems
- Fire extinguishers

- Emergency lighting
- Smoke detectors

6.4.2 The plan will include the required testing and servicing as required by manufacturer's recommendations. It will also include a determination of the most reliable and cost-effective way to perform the work including the decision to hire a contractor.

6.5 Equipment maintenance

6.5.1 The Trust will protect the investment it has made in motorised equipment by putting in place a comprehensive maintenance programme. The equipment to be covered includes (but not limited to):

- Leaf blower
- Lawn mower
- Hedge trimmer
- Snow blower

6.5.2 The Premises Manager is responsible for the development of this plan which shall contain components for minimal routine service as well as servicing for seasonal use. Serviceable components for each piece of motorised will be listed in the plan along with the type and frequency of service required.

6.5.3 The Premises Manager will also maintain a system to ensure that any employee that operates a piece of motorised equipment has the required license or certification and is competent to use it.

6.6 Landscaping and grounds

6.6.1 The Trust will prepare a routine maintenance schedule for the maintenance of the landscaping and grounds. Routine grounds maintenance includes numerous activities such as:

- Litter control
- Lawn care
- Maintenance of driveways, paths, steps and parking areas

- Care of flower and shrubbery beds and trees
- Maintenance of playgrounds, benches and fences

6.7 Financial management

6.7.1 The annual budgetary allocation will be managed by individual academies in liaison with the Premises Manager. When spending the maintenance budget, consideration should be given to:

- Regulatory and advisory
- Reactive maintenance
- Cyclical maintenance
- Planned maintenance

6.8 Procurement strategy

6.8.1 The requisite works will be provided in line with our Trust's scheme of delegation and based upon contracts, quotations, schedule of rates or framework agreements.

6.9 Contracting for services

6.9.1 The Trust will use contractors for maintenance services when it is in the best interests of the Trust to do so.

6.9.2 When the employees of the Trust have the time and skills to perform the work at hand, they will be the first choice to perform the given task. When the employees of the Trust have the skills to do the work required, but there is more work than there is time available to complete it, the Trust will determine if it is more cost effective to use a contractor to complete the work. If the Premises Team do not have the skills to complete the work, a contractor will be selected. In the last instance, the individual academy, in liaison with the Premises Team, will decide if it will be more cost effective to train a staff member to complete the work.

6.10 Strategy regarding health and safety

6.10.1 Construction and maintenance will be undertaken in line with current legislation i.e. CDM, British Standards, Codes of Practice and legislative

requirements. The Trust has a Health and Safety policy which is also responsible for ensuring health and safety compliance across the Trust.

6.11 Lifecycle costing strategy

6.11.1 Effective building maintenance will extend the life of an asset and reduce the running costs. To achieve this objective effectively will require:

- A collaborative approach across the Trust to establish priorities for assets and establish service asset management plans
- Optimal use of capital and revenue expenditure through whole life costing of construction and maintenance solutions
- Risk management to maximise use of, and where appropriate highlight shortfalls in, resources
- Effective planning with clear guidance, allocation of roles and responsibilities

6.12 Maintain and develop the property portfolio in a sustainable manner

6.12.1 In order to support and promote sustainability, we will endeavour to:

- Ensure building design takes into account the impact of climate change on temperature and rainfall
- Ensure the buildings achieve their energy and water efficiency ratings through management and maintenance plans and seek to incorporate renewable energy initiatives, where appropriate
- Ensure there are sufficient recycling facilities available and they are clearly marked
- Continue to adopt best practice for maintaining buildings in a sustainable manner
- Carry out a condition survey for all academies on a 3 to 5 year program

6.13 Inspection programme

6.13.1 The Premises Manager is responsible for developing a building inspection programme that schedules inspections at regular intervals. The inspection will encompass the following areas:

- Building exterior
- Building interior
- Building systems
- Site / grounds

6.13.2 The Trust goals of efficiency and effectiveness are achieved through ensuring that our stock is maintained in a manner that is safe, sanitary and in good repair. Any items noted at the routine inspection will be recorded on the individual academy inspection form.

6.13.3 The Premises Manager shall endeavour to complete all inspection generated work items within one month, depending on priority.

6.13.4 Nothing in this policy shall prevent any academy staff member from reporting any work needed that they see in the regular course of their daily activities. Such work items shall be reported to the Premises Manager.

7. Condition assessment / surveys

7.1 Condition surveys: an integral tool in establishing future use and programme works. The currently held information is based around data already captured and does not reflect changes to buildings benefitting from refurbishment, renewals and improvements. In line with good practice, condition surveys should be undertaken on a 5-yearly cycle.

7.2 Maintenance planning: will be undertaken as part of a 3-year rolling programme based upon information obtained from the new condition surveys.

7.3 Maintenance budget: the allocated budget for repairs and maintenance amounts to some 1% of the building asset value.

7.4 Rolling programme: a programme will be established to address the following major issues once statutory and legislative requirements are met. At this time, based upon information currently available this is likely to include;

- Roof and guttering
- Access and egress – safety and paving
- External lighting for safety and security

- External decoration
- Improvements to public areas

8. Building maintenance performance – key indicators

8.1 Legislative: compliance with regulatory statutory requirements.

8.2 Budget and timescale: ongoing monitoring and review of revenue and capital budgets in line with predetermined expenditure.

9. Skills update and training of premises team

9.1 The Trust will ensure the premises team have the necessary competency to carry out maintenance work. In order to allow its employees to perform to the best of their abilities, the Trust recognises the importance of providing learning opportunities, training, information, instruction and supervision. Training will relate to:

- Health and safety standards
- Safety procedures
- Fire procedures
- Manual handling
- Safe working at heights
- Basic maintenance / plumbing
- Legionella training

9.2 The Premises Manager is responsible for developing a training agenda for all premises staff through the performance appraisal process.

10. Monitoring arrangements

The Operations Committee is responsible for the implementation of this policy. This policy will be reviewed and approved by the Board of Trustees every year.

Signed..... Date: 8th July 2024

Chair of Trustees

Signed..... Date: 8th July 2024

Executive Headteacher