

# Premises Management Policy



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**Responsible Directorate**  
Operations

# Our Vision



## Transforming Lives of our learners

We seek to ensure that all our learners receive a high-quality education from expert staff and aspire to achieve the best they possibly can, no matter their background or ability. Our learners have safe, supportive learning environments in which they develop, grow, and challenge themselves. We are determined that our learners will receive the very best enrichment and opportunities to help them reach their full potential and ensure they are prepared for the future, wherever it might take them.



## Transforming Lives of our colleagues

Our colleagues are supported with the very best professional development through our innovative ATT institute, allowing them to stay focused on learning and developing as practitioners whilst they progress in their careers. We share the very best practice across our community of academies to help build systems and processes that really work.



## Transforming Lives in the communities we serve

We are committed to actively engaging with and addressing inequality in our local areas. We understand that every one of our academies and their diverse communities are different, so we aim to build a supportive, collaborative, and nurturing relationship with each whilst sharing our key values across our Trust.

**Commitment to Education**

**Transparency and Integrity**

**Innovation and Improvement**

**Dedication to Inclusivity**

# Our Values

## Commitment to Education

Our core purpose is to positively impact the lives of all our learners. Education will always be at the heart of everything we do.

## Transparency and Integrity

We are proud of our success whilst being open and honest about our areas for improvement. Our actions are always ethical and in the best interests of all our stakeholders.

## Innovation and Improvement

We are committed to innovative education- always moving forward and never standing still. Our learners are ambitious and prepared for a future that is constantly changing and developing.

## Dedication to Inclusivity

Our learners are all different and all important to us. We aspire to support, challenge, and help each one of them reach their full potential, regardless of their background or level of ability.

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# 1 | Policy Statement

- 1.1 Academy Transformation Trust plan, survey and identify the highest priority condition issues within our estate along with the cost to address, ensuring funding is directed to the areas of most need through use of a formulaic funding allocation for capital funded works, planned preventative maintenance and reactive maintenance. All of maintenance activities are completed in line with SFG 20 and British standards via our outsourced procurement vehicle for premises management.
- 1.2 Academy Transformation Trust have completed two OJEU tender procurement projects to outsource the cleaning, and facilities management in 2020 and 2022. This was to improve the flexibility, focus and effectiveness of the inhouse estates team and reduce cost and operational risk to the Trust. This is explained further in the policy.

# 2 | Scope and Purpose

The scope and purpose of this document is.

- 2.1 To ensure that our estate is meeting the need of the Trust outcomes and improvements and compliment the delivery of the education strategy.
- 2.2 To ensure we measure and correct how the estate and associated services are performing to ensure scrutiny and improvement.

# 3 | Objectives

- 3.1 The key objectives of the Premises Management 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 our Trust are effectively managed.
  - Ensure that health, safety, and security objectives are met.
  - Ensure that our Trust has necessary information for the monitoring, maintenance, condition and performance of buildings assets at an organisational level.

- 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.

3.2 To ensure the objectives were met within the means of the estate budget and resources, the Trust have undertaken the outsourcing of the delivery of

- reactive repairs
- helpdesk
- waste management
- ground maintenance
- Preventive Planned Maintenance/Serviceing of assets
- Site Supervision
- Cleaning

These are the benefits that our academy customers receive as part of the service:

- Access to a 24 hour, 365 days a year service and helpdesk
- Measured and agreed response times so performance can be measured.
- Complete service with one point of contact which saves academies juggling contracts needed to maintain their buildings. Saves time and money re-tendering and contract management.
- Fast service - help desk orders can be book for repairs via the pre-tendered maintenance contracts without the need for a site visit by a surveyor or engineer.
- Advice from a professional Building Surveyors or Engineer getting the facts for an academy to make the best decision.
- Safeguarding assurance - all work is completed by approved contractors who have been through a vetting system.
- Full financial control of all works with a clear and transparent SLA allowing academies to compare costs and get the most value from their budget.
- Saving time - with knowledge of sites and their “peculiarities” – a major benefit of using the Partnership is the continuity of work which enables operatives to become familiar with the sites and the individual procedures that each one requires.
- Cost of administering repeat tenders – a compelling argument when compared to the Partnership route.
- Cost certainty – The Partnership mitigates the risk of being over charged for work and provides reassurance to the Trust through a financial account process which is open and transparent.
- The scale of the Partnership enables individual customers to benefit from the investments made such as new technologies which would otherwise be inaccessible.

## 4 | Introduction

4.1 Academy Transformation trust Estate has a value of exceeding £110,000,000 and comprises of over 80 buildings across 21 academies within our Trust, two of which are PFI schools. Some academies within our Trust require investment relating to the condition of their individual buildings and such

works will, where appropriate, be supported via the SCA Capital fund. The Department for Education allocates funding each year to help maintain and improve the condition of school buildings and grounds. This is known as the school condition allocation(SCA).The SCA for the Trust in 23-24 is £2.7m

- 4.2 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 our Trust, and additional capital investment due to deteriorations. The SCA is used to manage the deterioration of our buildings, through condition reports and annual onsite inspections
- 4.3 The maintenance of buildings is critical to the proper management of assets and the overall management of capital receipts in achieving our Trust's objectives.

## 5 | Scope of Building Maintenance

- 5.1 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.
- 5.2 This policy applies to the maintenance of all academies within our 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'.
- 5.3 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:
- Retain the asset in a condition in which it can perform its intended function.
  - Prevent deterioration and failure or extend the life of the asset.
  - Restore to correct operation within agreed specification.
  - Restore physical condition to an agreed specification.
  - Recover from structural and service failure.
  - Obtain accurate and objective knowledge of physical and operating conditions, including risk and financial impact for the purpose of maintenance.
  - Partial equivalence replacement of components of the asset
- 5.4 Work excluded from 'building maintenance.'
- SCA Funded Capital works projects to address condition liability. Condition liability is defined as the amount of capital that is required to address building elements that need replacing i.e., roofs, windows, boilers etc.
  - Improvements and upgrading of facilities to meet new service requirements, capacity, or function.

- Refurbishment of existing building stock to new condition to extend the capacity of the asset (Addressing condition liability)
- Optimizing capital receipts on disposal of building assets where additional income exceeds expenditure.

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

- Maintaining functional and operational requirements of the working environment
- Maintain the physical condition and efficient operation of assets is kept to a standard appropriate to their service function and value to our pupils, staff, and visitors.
- Compliance with all statutory and technical requirements e.g., health, safety, security, and reliability

## 6 | Policies and Standards

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

### **Building Maintenance**

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

6.3 The Premises Management 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.

### **Maintenance Standards**

6.4 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.

### **Preventative Maintenance**

6.5 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 estates team anticipate maintenance requirements and make sure they are addressed in the most cost-effective manner.

6.6 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

6.7 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.

6.8 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.

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

#### **Life Safety Systems**

6.10 Our 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 Director of estates 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

6.11 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.

#### **Equipment Maintenance**

6.12 Our 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

6.13 The Director of Estates 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.

6.14 The Director of Estates 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.

#### **Landscaping and Grounds**

6.15 Our 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
- Maintenance of the Astroturf

#### **Financial Management**

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

- Regulatory and advisory
- Reactive maintenance
- Cyclical maintenance-examples of these below
  - Oil and gas boilers
  - Lift maintenance
  - Electrical installations
  - Emergency lights and fire alarms systems

#### **Procurement Strategy**

6.17 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.

#### **Contracting for Services**

6.18 Our Trust will use contractors for maintenance services when it is in the best interests of our Trust to do so.

6.19 When the employees of our 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 our Trust have the skills to do the work required, but there is more work than there is time available to complete it, our Trust will determine if it is more cost effective to use a contractor to complete the work. If the estates 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 Head of Estates, will decide if it will be more cost effective to train a staff member to complete the work.

### **Strategy Regarding Health & Safety**

6.20 Our Trust has a Service Level Agreement with the external H&S provider, Elite H&S in Education who provide advice and support relating to Health and Safety. Construction/maintenance will be undertaken in line with current legislation i.e., CDM, British Standards, Codes of Practice, and legislative requirements.

Our Trust has a Health and Safety Group which is also responsible for ensuring health and safety compliance across our Trust.

### **Lifestyle Costing Strategy**

6.21 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 our 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

### **Maintain and Develop the Property Portfolio in a Sustainable Manner**

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

- Ensure building design considers 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

### **Inspection Programme**

6.23 The Director of Estates 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

6.24 Our 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.

6.25 The estates team shall endeavour to complete all inspection generated work items within one month, depending on priority.

- 6.26 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 estates team.

## 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 the Trust is in the region of £1.8m for all academies.
- 7.4 **Rolling Programme:** A Trust wide 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 Indicators

- 8.1 **Customer Satisfaction /Performance Management:** to be obtained from end users and reviewed by the Director of Estates. These KPIs are written into the two outsourced contracts and are monitored and actioned monthly in joint contract meetings. An example of these is detailed below

Final KPI per Month - 2022/23	KPI
Reactive Callout - Attendance on site from receipt of call within assigned priority*	> 95%
Reactive Callout - Engineer work completed within assigned priority*	> 95%
Reactive Callout: Number of reactive jobs fixed on first visit*	> 50%
Reactive Callout: Percentage of work completed by direct labour*	>50%
Recall Callout: Number of justified recalls on reactive work	< 2%
Recall Callout: Number of recalls remedied within revised priority Level*	> 95%
PPM: No outstanding tasks against PPM Schedule	= 100%
Invoicing: Upon final completion of works invoice produced and sent within 45 days**	< 45d
Invoicing: Upon receipt of invoice, payment to be made to Vertas within 30 days	< 30d
Calls: Answer 90% of calls	> 90%
Calls: Wait time less than 40 seconds	< 40s
H&S: Number of reportable and non-reportable accidents	= 0
H&S: Number of near misses	= 0
H&S: Number of enforcement notices	= 0
100% desk top audit of contractor invoices via financial applications to ensure technical and mathematical accuracy	= 100%
Issue of monthly executive reports	= 100%

8.2 **Legislative:** compliance with regulatory statutory requirements

8.3 **Budget and Timescale:** ongoing monitoring and review of revenue and capital budgets in line with predetermined expenditure.

## 9 | Skills Update and Training of Estates Team

9.1 Our Trust will ensure the estates team have the necessary competency to carry out maintenance work. In order to allow its employees to perform to the best of their abilities, our 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 (estates maintenance team)
- Legionella training (estates management team)

9.2 The Head of Estates is responsible for developing a training agenda for estates staff through the performance appraisal process.