The information you need to know about your estate

To understand the wide range of information and data you need to help you manage your estate effectively, you should read the guidance on managing land and buildings in the good estate management for schools (GEMS) guidance.

Some information will provide an evidence base on which to develop strategic planning and inform decision making. This will be relevant to your board, senior decision makers and those involved in strategic estate management.

Other information will help you focus your operational management of the estate on priorities and making best use of your resources. This will be of interest to those directly managing the estate and sites.

The purpose of this checklist is to help you understand the sort of information you should aim to have and how you can use it to help you manage your estate effectively. Having this information is good practice, with the exception of some compliance data and records which are statutory requirements.

Having all of this information will enable you to manage your estate effectively. Realistically you may not have all this information at the outset, and you may want to prioritise what information you collect. This will depend on what you already hold, if you can meet statutory requirements and what information will be of most use to you. For example, if your organisation is focused on particular performance measures then you might want to prioritise information to help you report accordingly. Find out more about performance management.

You should use what information you already have whilst continuing to develop your data and knowledge. You may already have some of this information but hold it in different places, so it may take time to collate. Find out more about data management.

1. **Strategic documents**

Having this information may help you to:

* understand what your estate can (and needs to) do to support your organisation.
* have clear board and senior leadership engagement and direction and ensure everyone is aware of their roles and responsibilities for estates related issues.
* plan and budget for as much estates activity as possible and prioritise your resources.

This information is relevant for:

* boards
* senior decision makers
* estate managers
* those involved in strategic estate management

See examples of strategic estate documents.

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| **Type of information** | **Do you have this?** |
| An estate vision or high-level statement about the future of your estate, formally signed off at board level. |  |
| An estate strategy or medium-term strategic document showing the direction and key activities to steer the management of the estate, formally signed off at board level. |  |
| An asset management plan or action plan to direct short term estate related activities to meet operational needs and the delivery of the strategic objectives. |  |
| Clear estates related governance arrangements.  (See the good estates governance tool for more guidance). |  |

1. **Asset register or schedule of assets**

Having this information may help you to:

* know what you own or occupy, what you can or cannot do with each asset, what approval you will need for certain transactions and what your responsibilities and liabilities are.
* plan your maintenance and ensure all assets are safe and compliant, plan your budgets and avoid waste of resources.
* support your financial reporting requirements

This information is relevant for:

* estate managers
* those involved in strategic estate management

For help with gathering this information, read about tenure and land ownership.

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| **Type of information** | **Do you have this?** |
| A register of all land and buildings in your estate |  |
| Details of the legal interests you hold and the basis of occupation for each asset in the register (eg freehold, leasehold) |  |
| Details of any legal or other restrictions on each asset in the register (eg restrictive covenants in your title, controlling interests such as charitable restrictions) |  |
| If you have a lease, details of the lease terms (eg the term of the lease and the defined responsibilities for maintenance and payment of service charge) |  |
| Details of any legal interests held by third parties in or over each asset in the register (eg a lease of a building or an easement across the land) |  |

1. **Condition data**

Having this information may help you to:

* have an evidence base to inform strategic decisions about the future of your assets.
* have an evidence base to support any internal or external funding bids (such as CIF).
* plan and prioritise your maintenance budget and maintenance activity.

This information is relevant for:

* estate managers
* site managers
* those involved in strategic estate management

Find out more about condition surveys.

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| **Type of information** | **Do you have this?** |
| Up to date condition surveys for all your assets |  |
| An assessment of the condition of the estate against industry standards (condition is generally rated A to D). |  |
| An assessment of the prioritisation of identified condition works against industry standards (priority is generally ranked 1 to 4). |  |

1. **Compliance data**

Having this information will help you to:

* have confidence that your land and buildings are safe and secure, comply with all legislative requirements and risks are minimised.
* identify any areas or risks of non-compliance and prioritise actions and budgets to address accordingly.

This information is relevant for:

* estate managers
* site managers
* those involved in strategic estate management

Find out more about health and safety compliance.

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| **Type of information** | **Do you have this?** |
| Comprehensive compliance records and data for all compliance elements for all your assets |  |

1. **Cost information**

Having this information will help you to:

* have an evidence base to inform strategic decisions about the future of your assets
* maximise your resources and minimise waste
* measure and benchmark the performance of your assets

This information is relevant for:

* estate managers
* those involved in strategic estate management

Find out more about performance management and benchmarking.

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| **Type of information** | **Do you have this?** |
| A full understanding of each asset’s current and future occupation costs, including utilities, energy, rent, rates and insurance. |  |
| A full understanding of each asset’s current and future premises costs, including maintenance, cleaning, security and caretaking. |  |

1. **Plans and areas of the land and buildings**

Having this information may help you to:

* understand the location and size of your estate and assets, assess sufficiency, ensure consistent analysis when measuring performance of the estate, and inform strategic decision making
* plan and ensure appropriate testing and inspections are carried out to meet maintenance and statutory compliance requirements
* be confident your land and buildings are safe and secure for all users

This information is relevant for:

* estate managers
* site managers
* those involved in strategic estate management

Find out more about data and data management. Some of the information listed below may be included in condition surveys.

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| **Type of information** | **Do you have this?** |
| A site plan showing the extent of the site and the location/footprint of all the buildings on it |  |
| A scaled site plan |  |
| A scaled plan of each building reflecting: |  |
| * Current layout of each floor |  |
| * Up to date room numbers/references |  |
| * The current use of each room/area in the building |  |
| Floor areas (m2) of all areas in each building (gross internal area and net internal area). Be clear on means of measurement and use consistently. |  |
| A utilities plan showing the location of each service supply within each site and incoming point to each building (such as water supply, stopcock, drainage and telecoms cabling). |  |
| Plans showing the location of various items of equipment (such as fire safety equipment) |  |

1. **Suitability and sufficiency (capacity)**

Having this information will help you to:

* understand the net capacity and suitability of the school and have an evidence base to inform strategic decisions about the future of your assets
* identify any opportunities to generate income from the estate

This information is relevant for:

* estate managers
* those involved in strategic estate management

Find out more about suitability and sufficiency.

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| **Type of information** | **Do you have this?** |
| An assessment of the suitability of each asset |  |
| An assessment of the sufficiency of each asset |  |

1. **Environmental data**

Having the following helps you to:

* understand the environmental impact of your estate
* minimise consumption, waste and your environmental impact
* have an evidence base to inform strategic decisions about the future of your assets

This information is relevant for:

* estate managers
* those involved in strategic estate management

Find out more about understanding your energy and water usage.

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| **Type of information** | **Do you have this?** |
| An assessment of energy consumption in kilowatt-hours per m2 (gross internal area) |  |
| An assessment of CO2 emissions in tonnes of carbon dioxide per m2 (gross internal area) |  |
| An assessment of water consumption in m3 per m2 (gross internal area) |  |