

Estate Operations Policy

2025-26

PARTNERSHIPS | OPPORTUNITY | INTEGRITY | EQUITY | EXCELLENCE | PEOPLE-CENTRED

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Introduction

This Policy forms the basis of the Estates Management System in response to Consilium Academies' (the trust) legal duties under the Health and Safety at work etc. Act 1974 and wider supporting legislation relating to the management and maintenance of the built environment.

This policy sets out how the trust will comply with these requirements in relations to employees who have duties relating to Estate Operations and the trust's built environment.

This document is designed to assist with the delivery of the Estates Processes and Procedures across all establishments. It is not exhaustive and will not detail all processes and systems which may currently operate but covers the main scheme of control to be followed.

Included within this document are areas which provide guidance for the delivery of Estates Services.

Scope

Consilium Academies ("the Trust") has overall responsibility for the management of its premises. The Trust recognises that individual decisions about how the estate is used has a significant impact in terms of financial impact, statutory compliance and ultimately the effectiveness of our built environment. The Trust has a responsibility to provide an environment where students can learn and achieve their full potential and where employees are supported by a high-quality, reliable working environment.

The Estates Vision sets out a commitment to Healthy Places, Healthy Spaces. The efficient management of estate assets is a key milestone in achieving this outcome in that reliable, dependable spaces allow for uninterrupted operation whilst reduced failures through proactive planned maintenance allows for greater investment elsewhere.

We commit to supporting this estates policy and ensure there is a positive culture throughout our organisation to deliver the estates vision and provide the best possible teaching and learning environment.

The culture of our academies is the product of individual and group values, attitudes, perceptions, competence, and patterns of behaviour. This policy includes our commitment to ensuring our academies have a strong and positive culture through communication, training, collaboration and leading by example.

The success of this document in creating a culture of proactive maintenance across the estate is of paramount importance and should be embraced by all involved in the management and operation of our built environment.

Objectives

1. To achieve demonstrable industry best practice in Estate Management throughout the trust, delivered by competent and engaged professionals,
2. To improve organisational performance and provide direct improvement to school operational effectiveness,
3. To correct historic underinvestment in maintenance, addressing the legacy of unreliability, underperformance and wastage in our services,
4. To comply with legislative and statutory requirements, staying abreast of all sectors, national and international objectives and organisational targets,
5. To review and revise this guidance as necessary at regular intervals.

Key Outputs

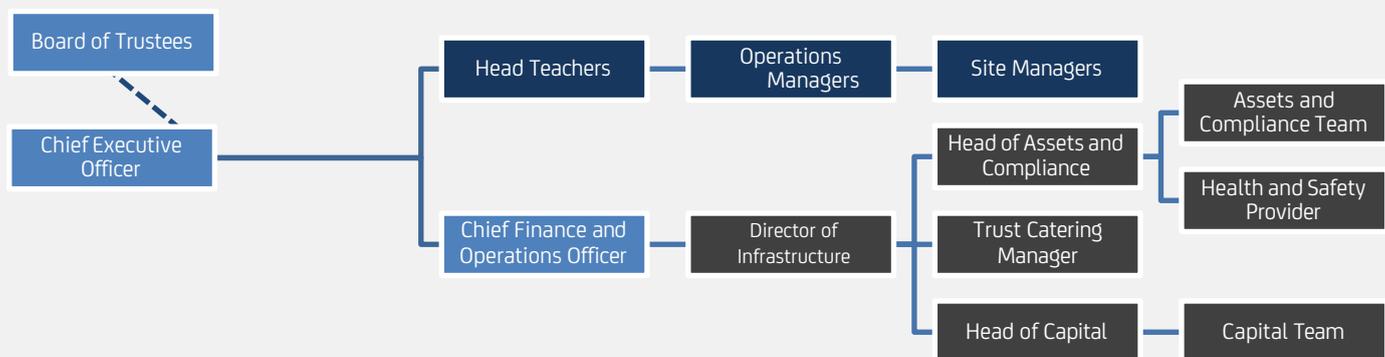
1. A well maintained, safe, secure site,
2. An efficient and compliant maintenance function,
3. An effective estates system with demonstrable compliance,
4. Accurate, current and accessible estates information,
5. Fully integrated estates services within the establishment,
6. Responsive, diligent, intuitive estate professionals delivering outstanding services,
7. Working environments which consistently enable high quality teaching and learning.

Review:

The Estate Management System will receive regular phases of implementation and improvement to ensure the built environment is safe and effective, reflecting on the recent implementation of Estates and Facilities Management systems.

Regular reviews of this Policy will be necessary, at least Bi-Annually by the Director of Infrastructure and Operations and Head of Assets and Compliance.

Responsible Persons:



Executive Leadership (Control of the Organisation):

This level of management oversees all organisational outputs and is not directly involved in Estate Operations.

Board of Trustees:

- The board of trustees are a peer of volunteers who are responsible for setting the direction of the Trust objectives, through setting the pertinent strategy, in line with Trust mission values and beliefs. Operationally the board of trustees will:
- Provide adequate resources,
- Ensure competent persons are appointed,
- Ensure appropriate arrangements are in place and being reported.

Chief Executive Officer (CEO):

- The CEO has overall executive accountability and liability for all matters within the Trust, they are appointed by and accountable to the Board of Trustees,
- The CEO delegates authority to the Chief Finance and Operations Officer, Principals and Director of Infrastructure and Operations for their respective areas of responsibility,
- The CEO has direct responsibility for the management and oversight of Estates Operations within the Operational activities of the Trust and for ensuring that decisions of the Board of Trustees are consistent with this guidance to maintain high standards of estates operational management,
- The Board of Trustees and Chief Executive Officer carry the key responsibility for implementing the correct estates management procedures, they will do this by:

- Leading by example on all matters concerning estates operations,
- Promoting and following this document,
- Dedicating adequate resources to the implementation and success of this Policy throughout the trust
- Communicating effectively with Staff, Students and Stakeholders,
- Monitoring and reviewing estates operational management performance and practice.

Chief Finance and Operations Officer (CFOO):

- The CFOO will ensure that the Estates Operations are adequately resourced and meeting the aims and objectives of the guidance. They will ensure that the trust wide strategic approach is well led, properly planned and efficiently managed.
- The CFOO has overall responsibility for financial and contractual matters relating to estates operations and management, ensuring adherence to relevant legislation, regulations, and guidance.

Strategic Leadership (Central Estates and Operations):

This tier of management is responsible for overseeing performance and standards at a strategic, trust-wide level. It leads on setting and upholding policy, ensuring good governance, promoting best practice and ensuring all establishments are legally compliant. It is not responsible for management of individual establishments or line management of academy staff. This responsibility is retained by the school and its Senior Leadership Team.

The 'Central Team' comprises a small team of professionally qualified, subject matter experts who lead on their respective discipline in support of establishment and trust objectives.

Senior Leader - Director of Infrastructure and Operations (DIO):

- The DIO takes leadership responsibility through the Estates and Operations department, ensuring the commitments are upheld by the Trust and ensuring establishments perform as required,
- Ensure the management system and those responsible for respective establishments are delivering the objectives of this policy and wider statutory legislation,
- Ensure the estates function is properly led, resourced and coordinated.

Senior Practitioners/Practitioners - Central Estates Team

- Lead the development and implementation of the estate management system across the organisation, ensuring the system and its processes are in line with changing legislation and external requirements,
- Monitor and support establishment performance across all sections and coordinate the implementation of actions across the trust relevant to their professional duties,
- Monitor progress against the Policy Aims and Objectives,
- Provide direct support and intervention at the establishment level, where performance is consistently below statutory requirements.

Establishment Leadership (School Led):

This tier of management has overall responsibility for the safe and effective operation of the establishment and implementation of trust or local requirements.

Each establishment's Senior Leadership Team is responsible for the line management and effectiveness of local estates staff.

Principal:

- The Principal will ensure the Senior Leadership Team (SLT) and Operations Managers are adequately resourced to deliver estates services within the estates system and processes.
- The Principal will line manage the Operations Manager, ensuring adherence to the Estates Vision and

Estates Processes. Business Support Officer (OM):

- The OM will plan and execute estate processes in support of the Principal, leading their respective support services and taking responsibility for local performance.
- Take responsibility for the expectations of the establishment with regards to estate operations. Provide leadership and direction on estates matters at a school level, ensuring effective and appropriate prioritisation of resources and championing estate matters at SLT level.

- The Operations Manager will line manage the Site Manager (SM), leading by example and ensure adherence to the Estates Vision and Estates Processes.
- Take responsibility for the overall compliance of the establishment, ensuring the Site Manager is effectively discharging their duties and providing the central team with assurance of good governance.

Site Manager (SM):

- The Site Manager has overall responsibility for the safety, efficiency, condition and operability of the respective establishment in support of the Principal and Operations Manager. They provide the professional knowledge, expertise and technical leadership to deliver all estate operations at an establishment level.
- Ensure the infrastructure of the establishment is properly maintained and performing as intended, identifying and escalating concerns related to site management and compliance to the Operations Manager, and the Central Estates Team as required.
- Plan and deliver the maintenance programme, working with Central Teams to ensure estates operations is an inclusive requirement in school decision making,
- Undertake periodic self-audits to ensure the establishment is fulfilling its statutory and trust led requirements, is in good repair and fit for purpose,
- Ensure that actionable items are rectified in a timely manner and seek support from the wider Estates and Operations department for further guidance when required,
- Oversee the physical implementation of the Estates Vision and Estates Processes where this requires the management, alteration or improvement of the establishment's built environment,
- Take responsibility for developing and maintaining documented knowledge of the establishment and where assets can be improved to fulfil the Estates System,
- The Site Manager will line manage the local estate operations team, contractors and suppliers in support of the Estates System. Provide effective expectations, leadership, guidance and inspiration to ensure the establishment is operating as effectively as possible and the delivery team is able to provide management cover when required.

Estates Delivery Teams:

- Comply with rules and regulations governing their work activities where related to the Estates System,
- Follow the instructions and processes as directed by their line manager,
- Be familiar with the documented knowledge system to ensure all works achieve the guidance and effective succession is in place to deputise for the Site Manager.

Contractors, Suppliers and Consultants:

- All Contractors working on Trust premises, are required to comply with relevant rules and regulations governing their work activities where related to the Estates System, or the wider commitments of the Trust. Contractors will be required to demonstrate their competence and adequate resources to carry out work, prior to their engagement.

Key Contacts (Central Team)

Director of Infrastructure and Operations:	Joel Thornton	joel.thornton@consilium-at.com
Head of Assets and Compliance:	Stuart Conway	Stuart.Conway@consilium-at.com
Head of Capital:	Suzie McNicholas	Suzie.McNicholas@consilium-at.com
Building Surveyor:	Martin Tingay	Martin.Tingay@consilium-at.com
Trust Catering Manager:	Kay Salter	Kay.Salter@consilium-at.com

The Standard

1. It is the responsibility of the local Senior Leadership Team (SLT) through the Operations Manager (OM) and Site Manager (SM) to deliver the requirements of this Policy within their respective establishment.
2. It is the responsibility of the Director of Infrastructure and Operations (DIO), through the central team to implement, manage and maintain the estates standard of the trust overall.
3. Alterations to trust estates policies and processes must be done with consultation from the central team and written permission from the DIO. Recommendations of improvement to the system should be coordinated through the central team.
4. The local SLT must maintain site specific operating procedures and documentation applicable to that site (e.g. Planned Preventative Maintenance (PPM) planning, maintenance information etc).
5. Consilium Academies has one estate and those with responsibility for its care share a collective responsibility beyond their own school. It is everyone's responsibility to support other trust schools where required.

Key Responsibilities (Establishment Level)

The effective delivery of estates operations requires coordination of work from across the organisation and often requires a pragmatic balance between routine service delivery and planned preventative work. Where conflicts arise, these should be identified and resolved through professional cooperation and decision making.

Health & Safety:

- This is a critical part of the role of the OM and Site Manager and managing the Health & Safety of the site is key to the effective delivery of estate services.
- Health & Safety is governed by a raft of legislation, the OM/Site Managers must ensure the establishment remains compliant with current legislation.
- The performance of Health and Safety is governed by the Health and Safety Policy and overseen by the Head of Assets and Compliance.
- The Site Manager must ensure that local estates employees and all appointed contractors are suitably trained and competent to carry out their respective work. This includes validating credentials and effective record keeping in line with the requirements of the Estates System.

People, Leadership and Culture:

- The culture of our academies is the product of individual and group values, attitudes, perceptions, competence and patterns of behaviour. A key deliverable of this policy must be a strong and positive work culture through communication, training, collaboration and leading by example.
- A positive and proactive estates culture must be a priority for SLTs and line managers by providing the right level of support, resourcing and standards. This will allow those responsible for the estate to focus on improvement and ensuring our built environment is delivering effectively.
- The OM & Site Manager are to ensure the site teams have the right support, tools and skillsets to effectively deliver their operational outputs.
- The OM & Site Manager are to ensure appraisals reflect individual staff outputs and objectives to ensure job descriptions align with individual staff capabilities.

Asset Management & Hard Services:

- The OM & Site Managers are to ensure that an effective workload planning system is in place to support all service delivery requirements, establishment staff are to ensure that adequate notice is given to allow resource planning.
- The OM & Site Managers are to ensure the estate budget is managed in accordance with requirements and wider guidance issued by the central team.
- Site Managers are to ensure that all works are managed within the Construction Design and Management (CDM) regulations and approved by the central estates team before instructing significant projects.
- The OM & Site Manager are to ensure that all contractors are a trust approved supplier before appointment, that they are managed under current CDM Regulations, local site safety rules and work in line with their submitted Risk Assessments and Method Statements. All contracts need careful management to ensure that what has been procured is ultimately provided, this will require confirmation from the Site Manager before final payment is made.
- Site Managers are responsible for installation, maintenance, and repairs of assets under the guidance of the central team.
- Site Managers must ensure an asset register is maintained and available digitally.
- Site Managers have responsibility for Asbestos Management in line with the Asbestos Policy.

Soft Services:

- A significant amount of local estates demand is focussed on traditional caretaking duties identified as Soft Services. This includes portering, cleaning, key holding, rectifying damage and supporting the operational needs of the school. The Site Manager is responsible for effectively planning and discharging the Soft Service priorities of the establishment in accordance with wider priorities.
- The Principal must ensure that delivery of soft services demand does not conflict with the statutory requirements of the establishment and all legal duties are fulfilled without exception.

Utilities and Energy Management:

- The Estates Vision sets out a commitment to Healthy Places and Healthy Spaces. The efficient use of energy and resources is a key milestone in achieving this outcome, in that a reduced financial burden allows for greater investment elsewhere and a high quality, efficient built environment provides comfortable, productive conditions for teaching and learning.
- The Utilities and Energy Management Policy aims to create a culture of energy awareness and carbon literacy. There is an opportunity to reduce the organisational impact and also empower students and staff about global concerns and environmental responsibility.
- We will commit to proactive energy and utility management by embedding a positive culture throughout our organisation and assisting all members of the school community to play their part.

Policy Implementation

1. Sites will be audited at least annually. Preventive & Corrective Action are to be raised via the online system for any issues identified. **The Site Manager is responsible for the implementation of the corrective action(s)**,
2. Site Managers must **acknowledge and follow Process and Procedures** as made available by the Central Team,
3. Site Managers must **ensure all buildings are safe for occupancy** and that all assets, both fixed and loose, are safe for use and comply with the relevant legislation, regulations, and best practice,
4. Site Managers must **maintain an asset register** in the format provided by the Central Team,
5. Site Managers must ensure Planned Preventative Maintenance (PPM) Statutory and Non-Statutory **maintenance is completed within the month planned** and before the allocated deadline, **the target for compliance is 95%**,
6. Site Managers must ensure any **PPM maintenance does not go overdue without a thorough explanation of cause and mitigation which is required to be recorded** in the 'Add to conversation' at the line item within the PPM (Monday.com) board. All overdue items must be risk assessed and required mitigations documented until the asset is brought back into compliance,
7. Site Managers must **ensure that all remedial works are accurately logged** and managed on the online system and that deadlines for completion are met.
8. Site Managers must ensure that all Reactive Maintenance or requests for works via the Estates Helpdesk are completed

within the deadline set by the System/Site Manager.

9. OM & Site Managers must promote and empower establishment staff to record their estate needs on the Estates Helpdesk and must not permit direct allocation of work to local staff, unless work is critical and must be attended immediately,
10. Site Managers must ensure that any Planned or Reactive maintenance which cannot be completed is escalated with an explanation, to the Central Team for their review and further direction,
11. As a minimum, the Site Manager must:
 - a. Ensure employees H&S Training Records are available for audit inspections or uploaded into the relevant training matrix – The Management of Health and Safety at Work Regulations 1999,
 - b. Ensure first aid boxes are checked monthly and records kept - The Health and Safety (First Aid) Regulations 1981,
 - c. Ensure fire alarm & escape lighting are serviced/tested and records are available - Regulatory Reform (Fire Safety) Order 2005, Fire Safety (England) Regulations 2022,
 - d. Ensure records are available for fire training and termly fire evacuation practices - Regulatory Reform (Fire Safety) Order 2005, Fire Safety (England) Regulations 2022,
 - e. Ensure employees' PPE records are available - Personal protective equipment (PPE) at work regulations from 6 April 2022,
 - f. Ensure PAT tests are within 12 months on portable equipment - PAT testing is not a legal requirement but can count towards the maintenance of electrical equipment which is a legal obligation of the Electricity at Work Regulations 1989. PAT testing is to be completed as Best Practice,
 - g. Ensure fixed wiring inspection & test certificate is within the last 5 years and that all remedials identified are recorded and rectified - Electricity at Work Regulations 1989,
 - h. Ensure ladders/stapladders are checked, recorded monthly, and inspected annually by a competent contractor - The Work at Height Regulations 2005, PUWER 1998: Provision and Use of Work Equipment Regulations 1998,
 - i. Ensure all gas fired equipment has service report within the last 12 months - The Gas Safety (Installation and Use) Regulations 1998,
 - j. Ensure all HVAC equipment is maintained in line with manufacturers recommendations - The Energy Performance of Buildings (England and Wales) (Amendment) Regulations 2020, TM44 Inspection of air conditioning systems (2012), F-Gas Statutory Inspection,
 - k. Ensure all maintenance, construction and building work is compliant under CDM - The Construction (Design and Management) Regulations 2007,

Contractor Management

1. OM & Site Managers must ensure the conduct and quality of external contractors is challenged, ensuring outsourced services are delivered within specification achieving value for money,
2. OM & Site Managers must ensure any new supplier application is referred to the Central Estates team for review and authorisation to proceed is received from the Assets and Compliance team before appointment,
3. OM & Site Managers must ensure all site contractors/suppliers contracted are annually reviewed to ensure the Trust are receiving value for money, both financially and operationally.
4. The programming of contractors must not unduly disrupt the operational needs of the school and the Site Manager must ensure that contractors operate within the trust's contractor processes.
5. Site Managers must ensure that a Contractor H&S Assessment and Induction is completed for every contractor before work commences - The Health and Safety at Work etc Act 1974.
6. Site Managers must ensure Contractors are effectively supervised whilst in attendance to ensure compliance with health and safety and safeguarding requirements and are working in accordance with their appointment. Contractors failing to comply must be removed from site and the matter raised to the Head of Assets and Compliance.

Notices

OM & Site Managers must ensure the following notices are displayed where employees can see them, and preferably on staff notice boards:

1. H&S Law Poster complete with contact details of H&S representatives
2. H&S Policy Statement
3. Employers Liability Insurance Certificate
4. Trust H&S Objectives & Programme – reviewed annually
5. Fire Procedure Notices
6. First Aid information

Legionella Control (L8)

Site Managers must:

- Ensure water management controls are in place as detailed below - Legionella Management (L8) - Health and Safety at Work Act (1974) and the Control of Substances Hazardous to Health Regulation (1994).
- Complete a Water Risk Assessment by a competent contractor and must include:
 - Management responsibilities, including the name of competent persons.
 - Description of the water system.
 - Potential sources of risk.
 - Any controls in place to control risks.
 - Monitoring, inspection, and maintenance procedures.
 - Records of the monitoring results, inspections and checks conducted.
 - Review date.

The risk assessment will identify any issues that will need further management. The appointed responsible person will take day-to-day responsibility for managing the control of any identified risk from legionella bacteria.

Asbestos

- Site Managers have responsibility for Asbestos management (if ACMs are present) and must ensure that the following has been conducted:
 - Ensure an intrusive Asbestos Survey (Management Survey) has been completed by a competent person and all actions identified from the survey to be completed within the time limits set.
 - Ensure a site Asbestos Management Plan is in place and is maintained through regular monthly documented condition review.
 - Ensure any further deterioration of ACM's identified is made safe and escalated to the Central Team for further direction and actions.
 - Ensure that all site estates staff are suitably trained to a minimum of Asbestos Awareness standards. Additional training may be required on sites with increased risk.
 - Note: Work involving asbestos and/or asbestos-bearing materials is strictly controlled by legislation and the Trust's policy and arrangements on the subject. If, during a contract the work is likely to involve disturbing asbestos in such a way as to give rise to dust the Contractor must cease work, withdraw his employees from the area and report immediately to the OM/Site Manager. Only contractors that are suitably licensed by the Health and Safety Executive are permitted to work with asbestos.

Appendix A: (Estate Operations)

Maintenance Guidance Planning:

OMs and Site Managers are empowered and must take an initiative-taking approach to Facilities Management. A site maintenance plan is to be produced and made available for external audit online system. The maintenance plan is designed to prevent unplanned failures and provide efficient operation of the assets. The plan must record each service as an individual line items to ensure services are not missed and to help track service and remedial costs.

The below table is not exhaustive but provides guidance for producing or enhancing existing plans:

Service Type	Legal Status	Period of Service	Reference
Asbestos Risk Assessment	Statutory	Annual	Control of Asbestos Regulations 2012
Asbestos Management Plan	Statutory	Monthly	Control of Asbestos Regulations 2012
Legionella Risk Assessment	ACOP	2 Yearly	L8 (Fourth edition) Published 2013
Legionella Hot / Cold temperatures	ACOP	Monthly	L8 (Fourth edition) Published 2013
Legionella Hot / Cold temperatures	ACOP	Monthly	L8 (Fourth edition) Published 2013
Legionella HW Heaters temperature	ACOP	Monthly	L8 (Fourth edition) Published 2013
Legionella TMV temps	ACOP	Monthly	L8 (Fourth edition) Published 2013
Legionella Little used outlets	ACOP	Weekly	L8 (Fourth edition) Published 2013
Water coolers	ACOP	6 Monthly	L8 (Fourth edition) Published 2013
Calorifier maintenance and descale	ACOP	Annual	L8 (Fourth edition) Published 2013
Water Tank maintenance and descale	ACOP	Annual	L8 (Fourth edition) Published 2013
Fire Risk Assessment	Statutory	Annual	Regulatory Reform (Fire Safety) Order 2005 The Fire Safety (England) Regulations 2022
Fire Alarm Annual (4 visits)	Statutory	3 Monthly	Regulatory Reform (Fire Safety) Order 2005 The Fire Safety (England) Regulations 2022
Fire extinguisher service	Statutory	Annual	Regulatory Reform (Fire Safety) Order 2005 The Fire Safety (England) Regulations 2022
Fire Call Points	Statutory	Weekly	Regulatory Reform (Fire Safety) Order 2005 The Fire Safety (England) Regulations 2022
Disabled toilet alarms	Statutory	Monthly	Regulatory Reform (Fire Safety) Order 2005 The Fire Safety (England) Regulations 2022
Fire Shutter service	Statutory	6 Monthly	Regulatory Reform (Fire Safety) Order 2005 The Fire Safety (England) Regulations 2022
Fire Extinguishers	Statutory	Monthly	Regulatory Reform (Fire Safety) Order 2005
Fire Door Retainers	Statutory	Monthly	Regulatory Reform (Fire Safety) Order 2005 The Fire Safety (England) Regulations 2022
Fire Doors signage/condition	Statutory	Monthly	Regulatory Reform (Fire Safety) Order 2005 The Fire Safety (England) Regulations 2022
Roller door warning lights	Statutory	Monthly	Regulatory Reform (Fire Safety) Order 2005 The Fire Safety (England) Regulations 2022
Door - Fire Door inspection	Statutory	Annual	Regulatory Reform (Fire Safety) Order 2005 The Fire Safety (England) Regulations 2022
Door - Access service	Statutory	6 Monthly	Building Regulations 2010 for England Approved Document M: Part M Access to and use of buildings – Volume 1 dwellings
Intruder alarm service - Main	ACOP	6 Monthly	BS EN 50131-1:2018+A3:2020 European standard Intrusion and hold-up alarm systems (I&HAS) installed in buildings

			Control of Noise (Code of Practice on Noise from Audible Intruder Alarms) 2014
Intruder alarm service - Sports Hall	ACOP	6 Monthly	BS EN 50131-1:2018+A3:2020 European standard Intrusion and hold-up alarm systems (I&HAS) installed in buildings Control of Noise (Code of Practice on Noise from Audible Intruder Alarms) 2014
CCTV service	Statutory ACOP	Annual	The Data Protection Act 2018 General Data Protection Regulation (GDPR)
Boiler / Pump/ Compressor / Pressure Vessels	Statutory	6 Monthly	The Pressure Systems Safety Regulations 2000 Energy Performance of Buildings Regulations (EPBR) 2007
AHU / Aircon / F-Gas certificate service	Statutory	6 Monthly	Energy Performance of Buildings Regulations (EPBR) 2007 TM44 Air Conditioning Inspection Survey and Report BS EN 15004 F-Gas Statutory Inspection Requirements
Pump and strainer service	Statutory	6 Monthly	Energy Performance of Buildings Regulations (EPBR) 2007
Gas Sound test - Mains	Statutory	Annual	Gas Safety (Installation and Use) Regulations 1998
Gas Sound test - Laboratories (Bunsen burners)	Statutory	Annual	Gas Safety (Installation and Use) Regulations 1998
LEV & Fume cupboard service and test	Statutory	Annual	The Health and Safety at Work act 1974 and regulation 9 of the Control of Substances Hazardous to Health
Convactor heater service	Statutory	Annual	ERP Lot 20
Kitchen appliances Gas/Fans/Refrigeration	Statutory	Annual	Gas Safety (Installation and Use) Regulations 1998 The Energy Efficiency (Refrigerators and Freezers) Regulations 1997
Stage lighting & Rigging	Statutory	Annual	Lifting Operations and Lifting Equipment Regulations 1998 (LOLER) The Education (School Premises) Regulations 1999
Ladders fixed / Portable / Tower Scaffold	Statutory	Annual	The Work at Height Regulations 2005
BMS	Non-Statutory	3 Monthly	EN 13646:1999: Building control systems – equipment ISO 16484-2: Building control systems – Part 2: HVAC control system
Workshop Equipment Service	Statutory	Annual	The Provision and Use of Work Equipment Regulations 1992
Sports Equipment	Statutory	Annual	General Product Safety Directive (GPSD) 2004 Stationary Training Equipment Standards EN 957 & EN ISO 20957 (Parts 1 – 10).
Cleaning Machinery	Statutory	Annual	The Provision and Use of Work Equipment Regulations 1992
5 Year Fixed Wire Test	Statutory	5 Yearly	The Electricity at Work Regulations 1989 IET Wiring Regs, BS7671, 2018
PAT	Statutory	Annual	The Electrical Equipment (Safety) Regulations 2016 IET Code of Practice (5th Edition) 2020
Lightning Protection	Statutory	6 Monthly	Electricity at Work Regulations 1989 BS EN/IEC 62305
Calibration Certificates	Statutory	Annual	The Measuring Instruments Regulations 2016
Emergency Lights	Statutory	Monthly	The Regulatory Reform (Fire Safety) Order 2005 BS EN 50172 / BS 5266-8

General Lighting	Statutory	Monthly	The Education (School Premises) Regulations 1999 Eco-design for Energy-Related Products and Energy Information (Lighting Products) Regulations 2021
External Lighting	Statutory	Monthly	The Education (School Premises) Regulations 1999 Eco-design for Energy-Related Products and Energy Information (Lighting Products) Regulations 2021
High Bay Lighting Cleaning	Statutory	6 Monthly	The Education (School Premises) Regulations 1999 Eco-design for Energy-Related Products and Energy Information (Lighting Products) Regulations 2021
Waste	Statutory	Monthly	The Environmental Protection Act 1990
Display Energy Certificate	Statutory	Annual	Energy Performance of Buildings Regulations 2012
Spill Kits - Pollution Incident	Statutory		The Pollution Prevention and Control (England and Wales) Regulations 2000
Winter Carpark grit spreading	Non-Statutory	Monthly	The Health and Safety at Work act 1974
Winter Rock Salt site use	Non-Statutory	Monthly	The Health and Safety at Work act 1974
Drainage	Non-Statutory	5 Yearly	Buildings Regulations 2010
Pest control	Statutory	3 Monthly	Prevention of Damage by Pests Act 1949
Hawking Bird control	Non-Statutory	Seasonal	Prevention of Damage by Pests Act 1949
Ladder Register	Statutory	3 Monthly	Section 6 of The Work at Height Regulations 2005
Equipment Register	Statutory	3 Monthly	The Provision and Use of Work Equipment Regulations 1992
PPE Register	Statutory	Monthly	Respiratory protective equipment (RPE)
Eye Wash	Statutory	Monthly	The Management of Health and Safety at Work Regulations 1999
First Aid Box Checks	Statutory	Monthly	The Management of Health and Safety at Work Regulations 1999
Risk Assessments	Statutory	Annual	The Management of Health and Safety at Work Regulations 1999
DSE Assessments	Statutory	Annual	The Health and Safety (Display Screen Equipment) Regulations 1992
COSSH Register	Statutory	Annual	Control of Substances Hazardous to Health 2002 (COSHH)
Radiation Register	Statutory	Annual	The Ionising Radiations Regulations 2017
H&S Training Matrix	Statutory	Monthly	The Management of Health and Safety at Work Regulations 1999
SHEQ Audit	Non-Statutory	Monthly	Best practice
Quality Checks	Non-Statutory	Monthly	Best practice
Scenario Training (SEMP)	Non-Statutory	Monthly	Best practice

Appendix B: (Estates Expenditure)

Forecasting expenditure against estates budgets is required to be controlled so that accurate future budget forecasting can be completed, which will lead to realistic budgets being issued for the maintenance of both fixed and reactive costs.

OMs & Site Managers are responsible for controlling expenditure under all Estates and Operations (**B-Code**) budget codes.

Examples:

- B101 – “Consumables”, “notice boards”, “furniture”
- B110 – “Annual legionella contracts”
- B111 – “Replace light fitting”

Process Cost Code B101 (General):

- Budget code B101 is to be used for general site expenditure and is not to include fixed or reactive estates costs.

Process Cost Code B110 (Planned Maintenance):

- OM/Site Manager are to ensure that each fixed service procured is delivering quality and value for money.
- OM/Site Managers are to ensure they fully understand what they are paying for, and services procured via an SLA. Each service must be line itemed and not bundled under a generic description such as “Heating”.

Example 1 Heating:

- Gas sound test cost
- Boiler service cost (hot water & heating)
- Air Conditioning service cost
- Air Handling service cost

Example 2 Legionella:

- Legionella Risk Assessment cost (Biennial)
- Temperature monitoring cost
- Calorifier descale cost
- Water tank disinfection cost

OM/Site Managers are empowered to challenge service reports and quality of work, but this must be challenged at time of service and with the service provider direct.

OM/Site Manager are empowered to challenge remedial costs, following a service of work and to seek alternate pricing from alternate contractors selected from the Approved Contractor List.

Purchase Orders (POs) for Planned Maintenance (B110) must be raised in September of each year and each PO is to cover the complete maintenance cycle for each service required. This process will allow for accurate forecasting of fixed annual contract costs.

Process Cost Code B111 (Reactive Maintenance):

The OM & Site Manager are responsible for controlling expenditure under budget code B111. This code is to be used only for remedial costs following a service report or a reactive cost following damage or failure of an asset item.

OM/Site Manager are to ensure that each remedial or reactive service procured delivers quality and value for money. OM/Site Manager are to apply for expenditure via the Estates Financial Requests Manager Monday.com board.