



## Good estate management for schools: organisational self-assessment tool

This tool will help you assess your organisation's approach to good estate management.

It will help you identify:

- where you are following good practice
- areas which require further development

### Who should complete this tool

This tool could be completed by headteachers, executive leaders or governing boards.

Ask different people with estate responsibilities to complete this assessment.

A range of responses can:

- highlight areas that need further development
- share knowledge and understanding

### How to complete the tool

For each statement you should select yes, no or partially.

Select **yes** when:

- the policy, process or document is in place, up to date and used across the organisation
- you understand what is required and it is consistently done

Select **partially** when:

- the policy, process or document is in place but is not up to date or is not used across the organisation
- you understand what is required but it is not consistently done

Choose **no** when:

- the policy, process or document isn't in place
- you do not understand what is required

Where you have answered partially or no, review the relevant areas of the Good estate management for schools manual. This will help you develop these areas.

Description of activity		Yes	Partially	No
<b>Strategic estate management</b>	Do you have an:			
	• estate vision	✓		
	• estate strategy		✓	
	• asset management plan	✓		
	• Has your governing board approved them?	✓		
	• Are they current and actively used?	✓		
	• Do you routinely review these documents?	✓		
<b>Overseeing the estate</b>	Do you:			
	• have clear accountability for the estate at board and senior leadership team levels?	✓		
	• have a 3 to 5 year budget plan for your estate?	✓		
	• prioritise your expenditure and challenge value for money?	✓		
	• have a clear performance management process for the estate that is actively used in decision-making?		✓	
	• understand what data you need to effectively manage your estate and measure performance?		✓	
	• have this data and hold it in an accessible system?		✓	
	• have clear and consistently applied procurement procedures that challenge value for money?	✓		
	• have clear policies to respond to emergencies involving your estate?		✓	
<b>Health and safety</b>	Do you:			
	• understand the relevant health and safety legislation and statutory requirements?	✓		
	• define, document and effectively communicate roles and responsibilities, including at board level?	✓		
	• understand and maintain documented evidence of compliance across your whole estate?	✓		
	• effectively manage your compliance procedures?	✓		
	• assess risks, prioritise health and safety, and compliance issues in your maintenance programme?	✓		

Description of activity		Yes	Partially	No
Maintaining the estate	Do you have a prioritised maintenance plan?	✓		
	Is it based on current and costed condition survey data?	✓		
	Is everyone clear who is responsible for maintaining land, buildings and equipment?	✓		
Understanding land and buildings	Do you:			
	<ul style="list-style-type: none"> <li>have a complete record of all legal or controlling interests in your estate?</li> </ul>	✓		
	<ul style="list-style-type: none"> <li>understand the implications of tenure on what you can do with your estate and what approvals you need for different land transactions?</li> </ul>	✓		
	<ul style="list-style-type: none"> <li>have current (less than 5 years old) and costed condition surveys for your whole estate?</li> </ul>	✓		
	<ul style="list-style-type: none"> <li>understand the suitability and sufficiency of your estate?</li> </ul>		✓	
Energy and water management	Do you:			
	<ul style="list-style-type: none"> <li>know how much energy and water you use across your estate and how much it costs?</li> </ul>	✓		
	<ul style="list-style-type: none"> <li>actively manage your energy and water use and look for opportunities to deliver efficiencies through the estate?</li> </ul>	✓		
Projects	Do you:			
	<ul style="list-style-type: none"> <li>have and consistently follow a process to identify, define, appraise and prioritise projects?</li> </ul>	✓		
	<ul style="list-style-type: none"> <li>use a challenging option appraisal process to help you make investment decisions</li> </ul>	N/A		
	<ul style="list-style-type: none"> <li>consider whole life issues including revenue consequences in your decision-making?</li> </ul>	N/A		
	<ul style="list-style-type: none"> <li>have, or know how to, procure appropriate skills to help you deliver projects and manage contracts?</li> </ul>	✓		