

**Jigsaw Learning Trust
Estate Management Policy
2023-2028**

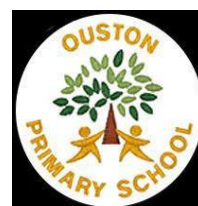


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1. Introduction

- 1.1 Jigsaw Learning Trust's Estate Management strategy sets the framework for managing the Trust's property portfolio effectively over the next 5 years. It will guide future strategic property decisions to ensure that the portfolio is managed sustainably and efficiently so that it can adapt to remain fit for the future and support delivery of education to the pupils in our Trust.
- 1.2 In accordance with the Department for Education's (DfE) [Good Estate Management for Schools](#) there are four core elements to strategic estate management. These are:
 - Estate vision
 - Estate strategy
 - Asset Management Plan
 - Strategic review process
- 1.3 This strategy will remain in place until 2028, subject to discretionary review by the Board of Directors, while the action plan will be updated annually and form part of the business plan for each year.

2. Aim

- 2.1 The aim of the Estate Management Strategy is to support the Trust Strategic Plan and 5-year forecast by managing the Trust's estate portfolio effectively providing best value for the academies. This Plan does this by:
 - Provide a welcoming, attractive, safe, well-resourced learning and working environment for the pupils and staff in our academies.
 - Supporting the Trust values of opportunity, collaboration and community by ensuring that all our academies are safe and as accessible and welcoming as possible to staff, pupils, parents and visitors.

3. Strategic objectives

- 3.1 The Trust's property portfolio is currently made up of primary schools with properties leased from the Local Authority (125-year lease). The buildings vary in age and design, and there are continuous challenges with maintenance and repairs:

Fulwell Infant School Academy - building 1987

Ouston Primary School - building 1964

- 3.2 The Trust has a duty to deliver “best value” in managing the estate to ensure that social, economic, and environmental benefits for the pupils attending all schools within the trust are achieved. This means managing limited resources in an intelligent and integrated way to provide value for money.
- 3.3 The needs and demands of the academies are evolving. It is important that the approach to estate management remains relevant, innovative, and flexible enough to respond to these changing needs and priorities. This strategy sets out how we will achieve these goals.
- 3.4 On a day-to-day basis, all properties are managed at school level. Capital spending is managed by the Trust, with input from Site Managers, SBM and Heads of School. This enables capital resources, including reserve funding, to be prioritised and directed where they are needed most. It also ensures that the property portfolio is aligned with the Trust’s strategic objectives whilst also allowing individual academies to fund local priority projects.
- 3.5 The strategic objectives of the Estate Management Plan are
- Ensuring that the estate is used as effectively as possible
 - Ensure that building renovation and refurbishment projects provide buildings that are well designed and fully meet service needs cost effectively
 - Deliver effective large-scale capital projects
 - Oversee the day-to-day estate management including maintaining and repairing existing properties
 - Prioritise safeguarding of all pupils with regards to resource allocation and staff expertise
 - Ensuring that School Condition Funds are strategically invested

4 Asset Management Plan

- 4.1 This sets out the detail of the Trust’s property portfolio, the approach used to identify priorities and the funding available together with the governance and management structures to support the delivery of the plan.
- 4.2 The Trust’s academies are based in Sunderland and Durham and vary in size and condition. The registered office of the Trust is Fulwell Infant School, Ebdon Lane, Sunderland SR6 8ED.

4.3 In addition, the Trust's Strategic Plan includes the expansion of the Trust in the coming years.

4.4 The current portfolio is as follows on a 125-year lease with Sunderland City Council and Durham Council

Academy	Main academy address	Land registry title deed number	Initial capital value	Asset name	Type	Temp or Perm	Primary Use	Number of classrooms	No of floors	Approx. year of build
Fulwell Infant School Academy	Ebdon Lane Fulwell Sunderland SR6 8ED	TY471846	2.345,000	School Building	Building	Perm	Teaching	13	1	1987
Ouston Primary	Arisaig Ouston Chester le Street DH2 1RQ	DU284482	1.295,000	School Building	Building	Perm	Teaching	10	1	1964

5 Condition and Curriculum Need

- 5.1 The Trust has undertaken periodic condition surveys and commissions annual property and mechanical maintenance reports from a local contractor which inform priorities for the asset management plan. There are plans to undertake further condition surveys within the next 18 months to provide up-to-date reports. Information on key issues is also gathered through academies' fire risk assessment, asbestos and legionella management plans, and H&S reviews.
- 5.2 Heads of School will work with the Finance Director, Premises Manager and SBM to plan capital improvements that will enhance the curriculum and provide a more nurturing environment for the pupils. These improvements will link with the individual school development plans.
- 5.4 The overall capital needs as at end of the summer term 2023 are categorised in the Asset Management Plan and prioritised according to need.
- 5.5 The asset management plan is maintained centrally. New and emerging issues can be raised at Academy level and must be approved as per the Trust scheme of delegation. The Board will sign off on the asset management plan annually.

6. Funding

There are three ongoing sources of capital funding:

6.1 Devolved Formula Capital

Annually, funding is available from Devolved Formula Capital (DFC) given direct to the academies for use in small-scale capital works. Devolved Formula Capital Devolved formula capital (DFC) is direct funding for individual institutions to maintain their buildings and fund small-scale capital projects, primarily ICT replacement plans.

This funding is allocated for individual schools and other eligible institutions to spend on capital projects that meet their own priorities. It is calculated as £4,000 per school plus £11.25 per weighted pupil. Funds are normally received in

May / June each year.

Condition Improvement Fund (CIF)

Small multi-academy trusts with less than 5 academies and 3,000 pupils can bid to the Department for Education for Condition Improvement Fund (CIF) for any major condition or health and safety issue.

CIF is a bid-based funding stream. The size of this fund reflects the mix of institutions eligible to bid, in terms of the number and age-phase of their pupils, their location, extent of modernisation and condition as identified through the PDS. The bidding round for CIF is usually open in November and closes in December, with the results being published in spring term. Jigsaw Learning Trust engages the services of a professional property management company with experience in successful CIF bid submissions to prepare professional submissions and ensure that it fits with the CIF criteria and submit the bids on the Trust's behalf.

Should an emergency arise outside of the bidding period, there is the ability to make an emergency submission to the CIF for any works needed that have Health and Safety implications i.e., there is a significant risk of causing harm.

6.2 In addition, the Trust will seek to maximise funding from other sources as and when they become available such as:

- SALIX funding for energy efficiency programmes
- Section 106/ Basic Need funding through the LA for academy expansion
- DfE/ LA funding available as a result of Trust expansion/ re-brokerage projects (Environment Improvement Grant or Strategic School Improvement Grant)
- Grant funding through charitable/ DfE programmes (e.g., National Lottery funding).

7 Statutory Compliance

7.1 An externally appointed third party are contracted to manage all statutory

compliance checks to ensure that the Trust complies with the DfE [Good Estate Management for Schools](#). Moving forward, the Trust will hold a central record of utilising the EVERY system.

- 7.2 All tasks are booked when they are due and carried out at school level.
- 7.3 A staff training record is in place to ensure that all staff, but particularly premises staff, have the relevant training in all necessary site issues, including: -
- Asbestos awareness
 - Legionella
 - Basic Health & Safety
 - COSHH awareness
 - Fire awareness
 - Manual Handling
 - Working at Heights

8 Ongoing Maintenance

- 8.1 The Premises managers, caretakers manage the sites on a day-to- day basis and escalate to the Business Manager, Finance Director, Head of School CEO any issue that requires maintenance funding.
- 8.2 The Finance Director ensures that sufficient funding is available to manage the above statutory compliance checks as well as any other minor repairs and maintenance required for their schools.
- 8.3 Site issues are currently raised to the Business Manager with the plan being Issues are either dealt with internally by school Premises Manager/caretaker, or if necessary, contracted to local, qualified contractors. Issues that aren't dealt with immediately are included on the capital development plan.
- 8.4 Premises Managers/caretakers also have a programme of small works, including decorating, minor preventive repairs and external works that is predominantly

completed during the school holidays.

- 8.5 For any works that are outsourced to local contractors, due diligence should be undertaken and contractor checklists completed to ensure that DBS checks, adequate insurance provision and the correct qualifications and/or accreditation is held by the company prior to commissioning any works.

9 Inspection & Testing

- 9.1 We maintain accurate records and details of all statutory tests which are undertaken at our premises. This includes relevant paperwork and certificates. All requirements and recommendations highlighted in inspection reports and certificates are reviewed and acted on as necessary.

- 9.2 As part of the records of completed works, we include the dates when the works were undertaken and the details of the individual or company who completed them, along with their qualifications/certifications and/or experience.

- 9.3 The table below sets out the issues we inspect, the inspection frequency, and the person responsible for checking each issue and, where appropriate, engaging a suitably qualified person to carry out inspection, testing or maintenance. It covers statutory checks as well as recommended good practice checks from relevant guidance.

ISSUE TO INSPECT	FREQUENCY	PERSON RESPONSIBLE
Portable appliance testing (PAT)	Annual We will refer to HSE guidance on maintaining portable electric equipment for suggested intervals and types of testing/inspection.	Fulwell - AGG Ouston - AGG
Fixed electrical installation tests (including lightning conductors)	Variable, according to the number and severity of faults found at last inspection. Inspection and testing always carried out by a competent person.	Fulwell - AGG Ouston - Durham LA
Emergency lighting	Monthly flash test. 6-monthly condition test (including 3-hour battery test) by a competent person.	Fulwell - Intalex Ouston - Intalex
ISSUE TO INSPECT	FREQUENCY	PERSON RESPONSIBLE
Gas appliances and fittings	Routinely, in accordance with manufacturer recommendations (or other professional advice if unavailable). Annual safety checks (in line with good practice / required if the premises are used for residential accommodation).	Fulwell - Sunderland LA Ouston - Sunderland LA

	All work carried out by a Gas Safe Registered engineer.	
Legionella checks on all water systems	Risk assessment of each site carried out and reviewed regularly by a competent person. The frequency of monitoring checks varies for evaporative cooling systems, hot and cold water systems and other risk systems - specific details can be found in guidance for each type from the HSE .	Fulwell - FM4U Ouston Durham
Asbestos	Regular inspections as part of the asbestos register and management plan. Reviews of the asbestos register annually. Refurbishment and demolition surveys before any refurbishment or demolition work.	Fulwell - Sunderland LA Ouston - Durham

Equipment used for working at height	<p>Inspected before use, and at suitable intervals appropriate to the environment it's used in and how it's used.</p> <p>In addition, inspections after anything that may affect the safety or stability of equipment, e.g. adverse weather or accidental damage.</p>	Caretaker
ISSUE TO INSPECT	FREQUENCY	PERSON RESPONSIBLE
Fire detection and alarm systems	<p>Weekly alarm tests, with a different call point tested each week where applicable.</p> <p>Quarterly and annual inspections and tests by a competent person.</p> <p>Annual fire risk assessment by a competent person also includes the maintenance of fire detection and alarm systems.</p>	<p>Fulwell -Intelex</p> <p>Ouston - Intelex</p>
Fire doors	Regular checks by a competent person.	Caretaker
Firefighting equipment	<p>Most equipment - extinguishers, fire blankets, hose reels, fixed systems (such as sprinkler systems) and fire service facilities (such as dry risers and access for emergency vehicles) - inspected annually (by a competent person where required) unless manufacturers'</p>	<p>Fulwell - Safe & Sure</p> <p>Ouston - Safe & Sure</p>

	<p>guidelines suggest differently.</p>	
<p>Extraction systems</p>	<p>Regular removal and cleaning of grease filters and cleaning of ductwork for kitchen extraction systems.</p> <p>Local exhaust ventilation systems (such as those for working with hazardous substances) examined and tested at least every 6 months by a competent person.</p> <p>More routine checks also set out in system logbooks.</p>	<p>Fulwell - FM4U</p> <p>Ouston - Durham</p>

ISSUE TO INSPECT	FREQUENCY	PERSON RESPONSIBLE
Chemical storage	<p>Inventories are kept up-to-date.</p> <p>Risk assessments for the Control of Substances Hazardous to Health (COSHH) are reviewed on a regular basis, plus whenever it's considered that the original assessment may no longer be valid, or where the circumstances of the work change significantly and may affect employees' exposure to a hazardous substance (in line with HSE guidance on COSHH assessment).</p>	Caretaker
Playground and gymnasium equipment	<p>Regular inspections - at least annually, and more regularly where any equipment is used more frequently than normal (e.g. where community use increases how often equipment is used).</p> <p>Outdoor fixed play equipment - periodic and annual inspections by a competent person.</p>	<p>Fulwell -</p> <p>Ouston - Durham</p>
Tree safety	<p>As part of risk assessment responsibilities, periodic visual checks for stability are carried out, with more detailed assessments if suspected structural faults or other risks are found.</p>	<p>Fulwell - ATW</p> <p>Ouston - ATW</p>

10 Risk assessments and other checks

10.1 Please refer to our risk assessment policy for information about the school's approach to risk assessment.

In addition to the risk assessments we are required to have in place (please refer to our risk assessment policy and health and safety policies for more information) we ensure we have risk assessments in place, regularly updated, to cover:

11 Links with other Policies

- Health and Safety
- Fire Safety
- Risk Management
- Business Continuity