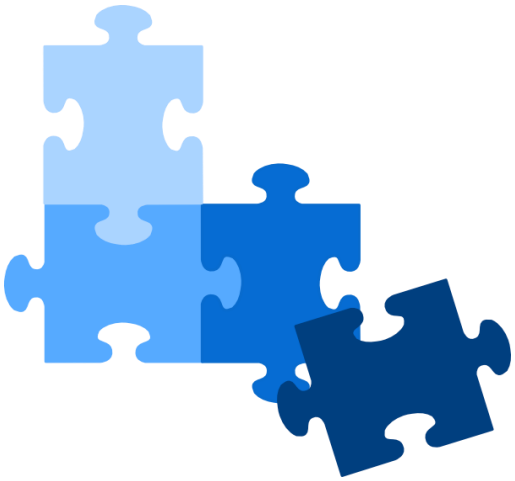


# Jigsaw Learning Trust
# Estate Management Policy
# 2023-2028

Fulwell Infant School Academy

OUSTON PRIMARY SCHOOL

**Table of Contents**


| | | |
|---|---|---|
| 1 | Introduction | Page 2 |
| 2 | Aim | Page 2 |
| 3 | Strategic objectives | Page 2 |
| 4 | Asset management Plan | Page 3 |
| 5 | Condition and curriculum need | Page 5 |
| 6 | Funding | Page 5 |
| 7 | Statutory compliance | Page 6 |
| 8 | Ongoing maintenance | Page 7 |

## 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.

The Trust will continue to prioritise CIF applications for the replacement of the fire alarm system and emergency lighting at Ouston Primary School due to the age and condition of the existing systems. Should CIF funding not be secured, the Trust will consider the use of reserves, subject to affordability and approval through the Trust's financial planning and governance arrangements.

**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. Statutory compliance records are maintained locally by each school. The School Business Managers maintain compliance records and monitoring schedules, supported by the Site Supervisors who undertake and record routine inspections, checks and maintenance activities. Compliance monitoring is overseen by the Finance Director, with external specialists engaged where necessary

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 plant.

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<br>We will refer to HSE guidance on maintaining portable electric equipment for suggested intervals and types of testing/inspection. | Fulwell – AGG<br><br>Ouston - AGG |
| Fixed electrical installation tests (including lightning conductors) | Variable, according to the number and severity of faults found at last inspection.<br>Inspection and testing always carried out by a competent person. | Fulwell – AGG<br><br>Ouston – Durham LA |
| Emergency lighting | Monthly flash test.<br>6-monthly condition test (including 3-hour battery test) by a competent person. | Fulwell – Intelex<br><br>Ouston - Intelex |

| ISSUE TO INSPECT | FREQUENCY | PERSON RESPONSIBLE |
|---|---|---|

| | | |
|---|---|---|
| Gas appliances and fittings | Routinely, in accordance with manufacturer recommendations (or other professional advice if unavailable).<br>Annual safety checks (in line with good practice / required if the premises are used for residential accommodation).<br>All work carried out by a Gas Safe Registered engineer. | Fulwell – Sunderland LA<br><br>Ouston – Sunderland LA |
| 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<br><br>Ouston Durham |
| Asbestos | Regular inspections as part of the asbestos register and management plan.<br>Reviews of the asbestos register annually.<br>Refurbishment and demolition surveys before any refurbishment or demolition work. | Fulwell – Sunderland LA<br><br>Ouston - Durham |

| | | |
|---|---|---|
| Equipment used for working at height | Inspected before use, and at suitable intervals appropriate to the environment it's used in and how it's used.<br>In addition, inspections after anything that may affect the safety or stability of equipment, e.g. adverse weather or accidental damage. | Caretaker |

| ISSUE TO INSPECT | FREQUENCY | PERSON RESPONSIBLE |
|---|---|---|
| Fire detection and alarm systems | Weekly alarm tests, with a different call point tested each week where applicable.<br>Quarterly and annual inspections and tests by a competent person.<br>Annual fire risk assessment by a competent person also includes the maintenance of fire detection and alarm systems. | Fulwell –Intelex<br><br>Ouston - Intelex |
| Fire doors | Regular checks by a competent person. | Caretaker |
| Firefighting equipment | 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 | Fulwell – Safe & Sure<br><br>Ouston – Safe & Sure |

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

| ISSUE TO INSPECT | FREQUENCY | PERSON RESPONSIBLE |
|---|---|---|
| Chemical storage | Inventories are kept up-to-date.<br>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). | Caretaker |
| Playground and gymnasium equipment | 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).<br>Outdoor fixed play equipment – periodic and annual inspections by a competent person. | Fulwell – Tyne and Wear Play, SportSafe<br><br>Ouston - Durham |
| Tree safety | 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. | Fulwell – ATW<br><br>Ouston – DH Horticulture |

## 10 Risk assessments and other checks

10.1 Please refer to the school's Risk Assessment Policy and Health and Safety Policy for further information about the school's approach to risk assessment.

The school ensures that appropriate risk assessments are undertaken, recorded and regularly reviewed to identify potential hazards, assess risks and implement suitable control measures. Risk assessments are reviewed as necessary to reflect changes in circumstances, activities or working practices, ensuring the health, safety and welfare of pupils, staff, visitors and contractors.

## 11 Links with other Policies

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