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Contents

Who is this tool for?

This tool will help you establish if you have the necessary knowledge and skills to support good estate management.

It should be completed by:

- headteachers
- senior leaders
- governors
- trustees

Depending on your individual responsibilities, you may not need to be knowledgable or skilled in all of these areas. If you are in doubt about your responsibilities, you should seek clarificiation. ### School business professionals

School business professionals will need knowledge and skills not covered in this tool. You can find further information about what is required in the ISBL Professional Standards Framework.

Further support

The information, training and tools section of the Good estate management for schools manual includes links to:

- additional information
- supporting tools
- training resources ## Taking a strategic approach

Knowledge

You should understand the:

- organisation's strategic priorities
- principles of strategic estate management and the contribution it makes
- difference between strategic and operational estate management
- role of governors and senior leaders in strategic and operational estate management

Skill

You should be able to:

- think strategically about the future of the estate
- translate your vision into strategic estates documents
- critically assess the estate to develop options for its future

Overseeing the estate

Knowledge

You should understand:

- the governance structure of your organisation
- the importance of effective governance in strategic decision making
- how a longer term financial planning process can enable efficient use of the estate and resources
- how to base funding decisions on organisational priorities with a full understanding of the financial implications
- how to ensure value for money through the management of the estate

- how to challenge and monitor the performance of the estate
- the value of property related data in strategic decision making

Skill

You should be able to:

- define the range and format of information and data needed to hold executive leaders to account
- use property performance data in strategic decision making
- prioritise investment in the estate
- make sure that decisions are supported by business cases to show value for money
- drive efficiencies through procurement
- make sure appropriate processes are in place to manage estate related emergencies

Health and safety

Knowledge

You should understand:

- which health and safety legislation and statutory requirements apply to the use of the estate
- the roles and responsibilities within the organisation related to statutory compliance
- the risks and implications of non-compliance

Skill

You should be able to:

- direct the school's/trust's arrangements for compliance with relevant health and safety legislation
- direct and enforce the use of robust safety and compliance procedures
- ensure that health and safety requirements are prioritised and inform strategic planning and decision-making

Maintenance

Knowledge

You should understand:

- how the condition of the estate impacts organisational performance
- how maintenance needs are identified and prioritised
- the value of medium to long term maintenance planning
- how maintenance needs are prioritised in financial planning

Skill

You should be able to:

- direct the assessment of future improvement and maintenance needs
- ensure the needs are presented as a prioritised and costed medium/long term plan and appropriately considered in the financial planning process
- critically assess and review the ongoing maintenance programme

Understanding your land and builings

Knowledge

You should understand:

- the implications of legal tenure on the use of land and buildings
- how the condition, suitability and sufficiency of the estate impacts on strategic planning

Skill

You should be able to:

- ensure decisions about the estate are taken in a strategic context and comply with legal and statutory requirements

Energy and water management

Knowledge

You should understand:

- the value (both cost and sustainability) of resources used in the operation of the estate
- how efficiencies can enable sustainable cost reductions

Skill

You should be able to:

- direct a consistent approach to managing energy use and operating energy efficient buildings
- ensure sufficient challenge to identify opportunities for energy efficiency and implement appropriate techniques

Projects

Knowledge

You should understand:

- the value of a clearly defined and transparent process for identifying, defining, appraising and prioritising projects
- when professional input is required and how this can be procured

Skill

You should be able to:

- direct and critically assess property related projects
- assess cost-benefit analyses and challenge options
- make sure value for money considerations are reflected in decision-making

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