



AMBITIONS
Academies Trust

Planned Preventative Maintenance

Outstanding Achievement for All

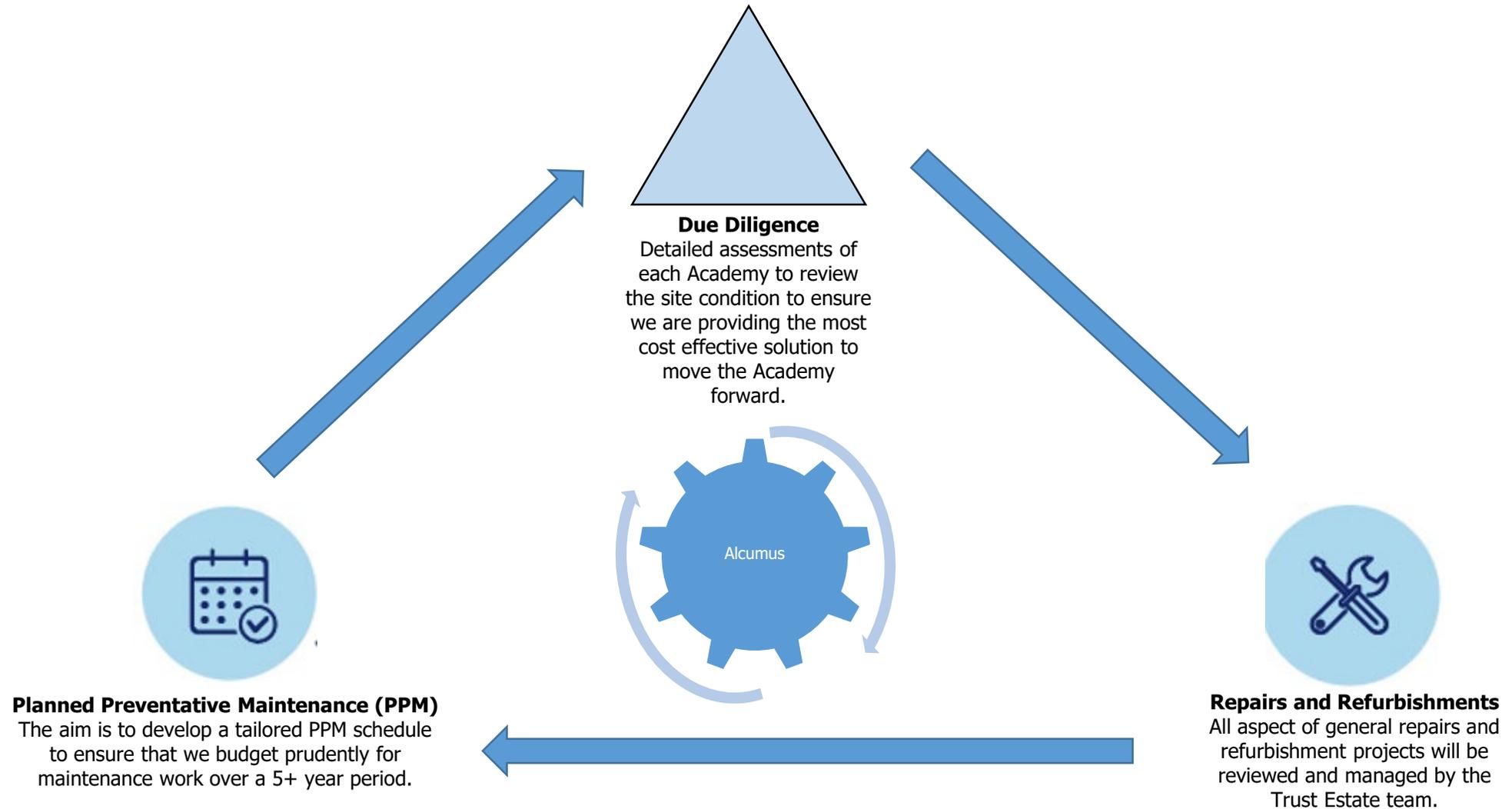
Introduction

- The Trust Estates Team comprising of the Estates **Director deputy Estate** Director who are looking to set the standards of condition to which the entire Trust will aim to maintain its land and buildings (property) within the context of the allocated resources. The standards will be driven by the newly created AAT Dashboard which specifically targets areas in the Estates infrastructure which can be monitored and scored against to give us an individual Academy grading to show full visibility to the board.
- The Trust's intention is that property should be maintained in a sustainable, safe and secure condition. The goal for the Estate team is to introduce a **Planned Preventative Maintenance** programme (PPM) and secure funds where possible (Capital Investment Fund - CIF/Salex). This will help ensure full compliance across the estate.
- The Trust Estates Team will identify the scope of work necessary to meet these targets in order that maintenance costs can be identified.
- Using the acronym DRAP (which stands for: **D**ue Diligence, **R**epairs and Refurbishments, **A**lcumus and **P**lanned Preventative Maintenance) we aim to outline how this will be achieved. The diagram on the next page will show how this will further improve and develop the Trust moving **into its next phase of development**, covering all aspects of maintenance, repair and projects.
- All funding will be allocated to the correct budget holder and dealt with appropriately for each Academy, with the involvement of the Trust Estate team and finance department.



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Introducing DRAP



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Due Diligence

Due diligence is an investigation or audit of an investment to confirm all facts.

It refers to the care a reasonable person should take before entering into an agreement or a financial transaction with another party.

To ensure our due diligence as a Trust we must ensure we are taking reasonable steps to avoid committing a tort or offence.

Tort: A wrongful act or an infringement of a right leading to legal liability.

Offence: A breach of a law or rule; an illegal act.

We aim to ensure this by creating a comprehensive assessment of the entire Estate. These assessments will provide us with the information we need to establish our assets and liabilities across the Trust.

Based on this information we can develop our proposed Planned Preventative Maintenance (PPM).



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Repairs and Refurbishments

What are Repairs and Refurbishments?

Repair and/or Refurbishment : is the restoration of a broken, damaged, or failed device, equipment, part, or property to an acceptable operating or usable condition or state.

Whether we are undertaking a repairs project or want to refurbish a particular Academy, the Trust Estate Team will manage all aspects of the project. This will ultimately save time, hassle and money.

The Trust Estates team has a number of years expertise in this area which means every element in the design, procurement and delivery of the building work, will be managed. All backed up with regular reporting.

The Trust Estates team will manage the entire process, including budgets and risk management, and procure the best contractors to do the work at all times.



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Planned Preventative Maintenance (PPM)

What is Planned Preventative Maintenance (PPM) ?

PPM is all about proactively maintaining our buildings to help us to keep them in a good condition, complying with the lease terms and ultimately increasing our employees and pupils well-being. What's more, planning and organising any maintenance projects will enable us to budget for the capital expenditure over a number of years.

The Trust Estates Team aim is to create a strategy, which involves planning and costing the repair or maintenance works for a critical areas so we can plan this in advance. Our intention is to forecast at least 5 years in advance.

The Trust Estates team will look to understand building warranties and any insurance requirements that the buildings are subjected to, and we will aim to integrate these into the strategy.

Working with the Finance team will help us understand lease terms. So we know what works we can or cannot carryout in order to comply with our lease.



The Benefits of PPM are:

- PPM will improve the performance and safety of the equipment within the Trust.
- PPM will help to improve the life expectancy of assets and thereby eliminating premature replacement of machinery and equipment.
- Equipment downtime is decreased and the number of major repairs are reduced.
- Reduced overtime costs and more economical use of site teams due to working on a scheduled basis instead of a crash basis to repair breakdowns.
- Timely, routine repairs circumvent fewer large-scale repairs.
- Improved safety and quality conditions for everyone.



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Alcumus

Alcumus feeds into everything that takes place across the Trust at the individual site level and is managed by the site manager/caretaker and ultimately overseen by the Trust Estate team.

Currently approx. 60/70+ maintenance actions are tracked, monitored (in-house and off-site), to ensure full ongoing compliance at each individual Academy.

Alcumus has a number of benefits for us and allows us to ensure Due Diligence, while long term plans such as the PPM are developed.

Alcumus covers:

Programmed compliance schedule across ALL Academies.

Detailed reporting at Trust level to further ensure our due diligence and complete visibility of compliance.

System generated flags to Site Team and Estates Management Overdue compliance activities.

All of this is **Auditable**.

Items on Alcumus include the following:

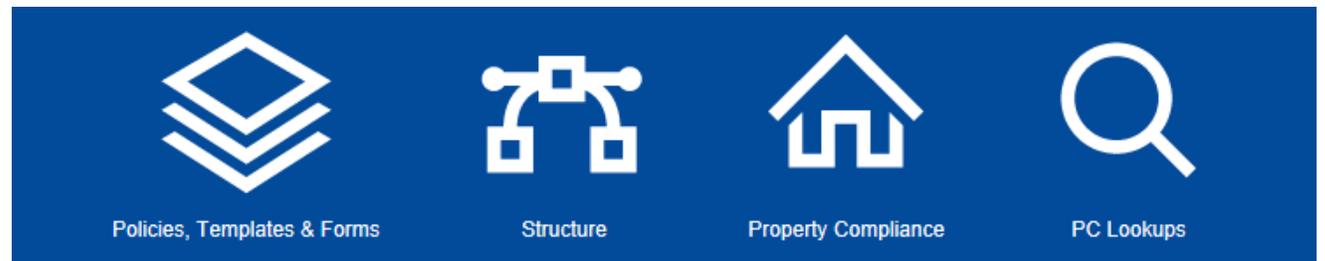
Regular inspections and testing for ongoing Heating, Venting, Lighting, Power and alarm requirements/servicing etc

Inspections for vandalism, graffiti, etc.

All grounds maintenance covering gardening.

Regular safety checks incl. all Fire and General.

And a lot more.....



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Academy Condition - Grading

Based on the detailed assessment the Trust Estate Team will carryout, each Academy will be **GRADED**. They will be rated against the following:

"A" As new condition. Typically built within the last 5 years, or may have undergone a major refurbishment within this period. Maintained/serviced to ensure fabric and building services replicate conditions at installation. No structural, building envelope, building services or statutory compliance issues apparent. No impacts upon operation of the building. The expectancy is that with proper maintenance the building will provide a satisfactory standard of service.

"B" Sound, operationally safe and exhibiting only minor deterioration that can be dealt with within existing maintenance budgets. Maintenance will have been carried out during this period. Minor deterioration to internal/external finishes. Few structural, building envelope, building services or statutory compliance issues apparent. Likely to have minor impacts upon the operation of the building.

"C" Operational, but major repair or replacement will be necessary within a reasonably short period. Requiring replacement of building elements or services elements in the short to medium term. Several structural, building envelope, building services or statutory compliance issues apparent, or one particularly significant issue apparent. Often including identified problems with building envelope (windows/roof/cladding, etc.) building services (boilers/chillers/air handling units, etc.). Likely to have major impacts upon the operation of the building, but still allow it to be operable.

"D" Inoperable, unsafe, with the serious risk of major failure or breakdown requiring urgent expenditure. Building is inoperable due to statutory compliance issues or condition, representing a health and safety risk or breach. May be structural, building envelope, or building services problems coupled with compliance issues. The conditions are expected to curtail operations within the building.

The long term goal for the Trust is to maintain all land, buildings, associated engineering services and plant to a minimum of Condition **"B"**.



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Our Next Steps.....

- **Step 1. Get The Right People on Board:**
 - The Estate team along with the site managers are working together on this
- **Step 2. Set Goals for Your Preventive Maintenance Plan:**
 - The primary goal of maintenance is to avoid or mitigate the consequences of failure of equipment.
 - Maximize equipment effectiveness
 - Develop a system of productive maintenance for the life of the equipment
 - Actively involve all employees
- **Step 3. Inventory the Equipment and Assets:**
 - Go through each site and create an inventory all the equipment we're considering to include in our preventative maintenance plan. This includes, boilers, windows and roofs etc.
- **Step 4. Make Decisions: such as....**
 - Is the repair/replacements costs are high?
 - Has the maintenance been performed routinely?
 - Is the equipment critical to your academies success?
 - Is it operating to manufacturers' specifications?
 - Is it a high priority asset?
- **5. Get to Know the Owner's Manuals:**
 - Read up on the manufacturer guidelines, as well as the warranty conditions to help you figure out the best tasks for preventive maintenance.
- **6. Schedule Planned Preventative Maintenance**
 - Aim to get as many of your high cost/high priority pieces of equipment on a preventive maintenance schedule, but you don't have to do it all at once
 - Regularly review reports from your preventative maintenance software to watch for items you may need to plan for
- **7. Schedule for the Short Term Preventive Maintenance:**
 - Managed and tracked centrally and onsite via Alcumus. This will help us enjoy a longer life on all equipment, lower maintenance costs, and shorter downtime

