**How to begin estate performance management and benchmarking**

To understand the principles of estate performance measurement and benchmarking, you should start by reading the [guidance](https://www.gov.uk/guidance/good-estate-management-for-schools/performance-management-and-sustainability).

This document is intended as a supplementary tool to provide you with an outline process and potential performance measures to help you get started. It will help you develop an effective performance management system for your organisation.

It is important to remember that:

* boards need to hold executive leaders to account and be confident that school premises are safely and effectively managed – see the top 10 estate checks for boards for more information
* senior leadership should be responsible for performance management and benchmarking, they should report to the executive leadership team and board
* you should identify performance measures that meet the needs of your organisation – you could start with just 5 or 6 simple, clear measures.

Step 1

**Consider what performance measures are important to your organisation and can help you manage your estate more effectively**

You should discuss, agree and prioritise the measures that are important to your organisation with your board. Aim to choose 5 or 6 useful measures.

You should identify measures that cover a range of areas. The measures may be financial, environmental, to improve the condition and safety of the estate or to inform strategic planning.

When you select performance measures, you need to consider what is important to your organisation and what will help you take actions to make meaningful improvements. For example if you have:

* targets to reduce premises costs, you may select measures that focus on occupation costs
* a particular interest in sustainability, you may select measures that focus on energy consumption or emissions
* a strategy to improve the condition of the estate, you may select measures that focus on condition categorisation

If you want to benchmark with other organisations, you should also consider what performance measures they use but ensure they are important to you too.

Step 2

**Consider what data you will need to measure performance.**

Bear in mind that to produce meaningful performance measures you will need access to a lot of information about the estate and you will need to analyse it further. You should be realistic about how easy it is to access this information and what tools you have for analysis, as this will affect what measures you choose. You will probably already have most of this information, but it may take time and resource to collate.

Find out more about the information you need to know about your estate.

The table in this document has been produced to identify a number of common performance measures. You can use the table to compare how useful different measures will be to you, if you have the data to measure them and how realistic it is to collect it. This list is not exhaustive and you may identify other measures that are useful to you. Remember you should only select measures that are important to you and will help you improve over time.

Step 3

**Develop a process**

1. Establish the baseline performance against the selected measures. You will use this to understand how you are performing against each measure at the start, so you can determine changes over time. You can set targets to improve performance which should help you identify priorities in your estate strategy.
2. Develop a standardised reporting framework including periodic reporting to the board. If you use standardised reporting formats, you can analyse your data in a consistent way and present the information so it is easy to understand changes over time. Ensure your reporting format meets the needs of your senior leadership team and board.
3. If you have a number of buildings in your estate, you should compare performance of different buildings – this will help you identify poor performance, opportunities for improvement and inform your strategic planning. Ensure you understand the reasons for any differences as this will influence how you respond – for example different buildings may be used for different purposes, be of different ages or construction types.
4. Use how you perform against your targets to set new estate priorities. You should review targets periodically to ensure you continuously improve and help you identify priorities in your estate strategy.
5. Refine your measures over time where your priorities change or your approach matures. If the measures you use are not providing any meaningful benefit to your organisation and are not helping you improve, you should consider alternative measures. Over time, you may also have access to more data which will enable you to measure performance in other areas.

Step 4

**Compare with other organisations**

Once you have established measures and have ready access to the required data, you should consider benchmarking with other organisations. External comparison can help you identify opportunities to improve your own performance.

There may be existing localised, regional or national benchmarking groups you could join, and you could consider contacting peer organisations. You should check if you need the consent of trustees before sharing information. [Find out more](https://www.gov.uk/guidance/good-estate-management-for-schools/performance-management-and-sustainability) about potential benchmarking organisations.

You will need to find out what other organisations are measuring and if those measures are useful to you. You also need to ensure you understand the basis of measurement so you are comparing like with like and can analyse the comparisons.

**Estate benchmarking – indicative performance measures and data requirements**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Performance measure** | **What data do I need to produce this measure** | **Where can I find this data** | **Will this lead to meaningful action** | **Is this data already available** | **Is this realistic to collect** | **Can we use this to compare different buildings in our estate**  | **Can we use this to compare with other organisations** |
| 1 | Property occupation costs per sqm | Floor areas of all buildingsOccupation costs for all buildings | Condition surveys, scaled plans, budget headings, schools financial benchmarking |  |  |  |  |  |
| 2 | Property occupation costs as a proportion of budget | Running costs for the estateThe total budget for the [*school*] | Condition surveys, scaled plans, budget headings, Schools Financial Benchmarking |  |  |  |  |  |
| 3 | Condition - % of estate in condition categories (A-D) | Condition surveys for the whole estate (providing the appropriate categorisation)Floor areas of all buildings  | Condition surveys, scaled plans |  |  |  |  |  |
| 4 | Prioritisation - % of estate in each prioritisation category (1-4) | Condition surveys for the whole estate (providing the appropriate categorisation)Floor areas of all buildings | Condition surveys, scaled plans |  |  |  |  |  |
| 5 | Proportion of the estate which is statutorily compliant | Compliance assessment of the whole estate  | Compliance records for all areas of compliance |  |  |  |  |  |
| 6 | Split of maintenance spend between planned/reactive (%) | Planned maintenance schedule and expenditure details (per annum)Maintenance expenditure not covered in planned schedule (per annum) | Budget headings |  |  |  |  |  |
| 7 | Average spend on maintenance per sqm | Total expenditure on maintenance (per building or the whole estate)Floor areas of all buildings  | Budget headings, condition surveys, scaled plans |  |  |  |  |  |
| 8 | Maintenance need per sqm | Condition surveys of the whole estate (providing estimated costs for works)Floor areas of all buildings  | Condition surveys, scaled plans |  |  |  |  |  |
| 9 | Space (sqm) per pupil | Floor areas of each building Number of pupils per building | Condition surveys, scaled plans, pupil numbers on roll |  |  |  |  |  |
| 10 | Energy consumption | Energy consumption for each buildingFloor areas of all buildings  | Utility bills  |  |  |  |  |  |
| 11 | Emissions from the estate | Emissions from each building Floor areas of all buildings | Display Energy Certificate (DEC) |  |  |  |  |  |
| 12 | Sufficiency  | Floor areas of all buildingsAn assessment of sufficiency (capacity) for all buildings (and areas within them) by reference to use and pupil numbers\* | Condition surveys, scaled plans, capacity assessment using area guidelines (BB103/104), schedule of accommodation tool\* |  |  |  |  |  |
| 13 | Suitability | An assessment of suitability for all buildings (and areas within them) | Using a consistent assessment approach  |  |  |  |  |  |

\* See area guidelines for [mainstream schools](https://www.gov.uk/government/publications/mainstream-schools-area-guidelines), [SEND and alternative provision](https://www.gov.uk/government/publications/send-and-alternative-provision-area-guidelines) and the [Schedule of accommodation tool](https://www.gov.uk/government/publications/mainstream-schools-schedule-of-accommodation-tools).