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| --- | --- | --- |
| Number | Document | Yes/No |
| 1 | A comprehensive asset register |  |
| 2 | Deeds, title plans and registers |  |
| 3 | Leases and licences |  |
| 4 | Building condition surveys |  |
| 5 | Maintenance plans and records |  |
| 6 | Statutory compliance records |  |
| 7 | Inspection records and test certificates |  |
| 8 | Insurance policies |  |
| 9 | Building warranties and guarantees |  |
| 10 | Operation and maintenance manuals |  |
| 11 | As-built drawings and floor plans |  |
| 12 | Digital information from Building Information Modelling (BIM) |  |
| 13 | Facilities management agreements |  |
| 14 | Grant, loan or mortgage documentation |  |
| 15 | Energy performance certificates |  |
| 16 | Utilities, security, and other relevant contracts |  |
| 17 | Fire strategy |  |
| 18 | Asbestos registers |  |

# Estates documentation checklist

# Estates data checklist

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| Number | Data item | Yes/No |
| 1 | Site information (inc. number of sites, names and addresses) |  |
| 2 | Building information (inc. construction date, method of construction, type, size) |  |
| 3 | Tenure information and title details |  |
| 4 | Lease terms (inc. expiry and break dates) |  |
| 5 | Space measurement inc. Gross Internal Area (GIA) |  |
| 6 | Room usage (inc. capacity and utilisation)  |  |
| 7 | Condition and functionality assessments |  |
| 8 | Energy and water consumption, contract terms and costs  |  |
| 9 | Carbon emissions |  |
| 10 | Capital expenditure plans and records |  |
| 11 | Property management information and costs |  |
| 12 | Insurance premiums, renewal dates and replacement values |  |
| 13 | Service charges (if applicable) |  |
| 14 | Rateable values and business rates paid |  |
| 15 | Repair and maintenance costs  |  |
| 16 | Cleaning information and costs |  |
| 17 | Security information and costs |  |