



Department
for Education

Estate management competency framework

**Functions, skills, and knowledge required to effectively manage
the school estate**

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Summary

The Department for Education is launching a programme of work to support the capability and professionalisation of estate management roles in schools – starting with the estate management competency framework. This strand will help schools to recruit and develop the essential levels of skills and competencies for roles and functions working to keep their buildings safe and well-maintained, as well as supporting the individuals who conduct estate management roles.

Managing your school estate effectively will help you to save money and ensure you have a healthy, safe and sustainable school environment. The estate management competency framework is designed to:

- set the standard skills and knowledge required by those conducting estate management functions, roles and responsibilities at different levels
- allow individuals and organisations to benchmark existing skills/experience against the framework, and identify gaps
- help individuals with planning their professional development

Who is this publication for?

You will find this framework useful if you have responsibility for overseeing or managing the school estate. This includes:

- proprietors, leaders and governors of schools
- charity trustees of academies and academy trusts
- trustees of schools
- school business professionals
- those with responsibility for the day-to-day running of the school estate
- local authorities
- diocesan authorities and other religious authorities and bodies

This information is intended for those working in estates, property, and infrastructure roles within schools.

Estates management functions overview

This competency framework outlines 7 functions of estate management, aligned to good estate management for schools (GEMS). These functions cover the broad range of experience and technical competency required within the education sector. We have identified a few key activities that are included within each function.

This information is intended for those working in estates, property, and infrastructure roles within schools, and is aimed at ensuring that people have the right level of skills and competencies to do their roles effectively.

	Estate management function	Overview	Key activities
1	Strategic estate management	Taking a strategic approach to the management of your land and buildings, in line with your school's business planning objectives. Having the right plans and documents in place to help create an environment that supports good teaching and learning.	<p>Understanding how to manage your estate well by producing strategic plans that support your school's educational and other goals</p> <p>Putting together and agree an implementation plan</p> <p>Setting up good governance arrangements for managing your estate well</p> <p>Assigning clear organisational responsibilities for the estate</p>
2	Planning and organising your estate resources	Ensuring your school's policies and procedures help you manage your estate effectively and efficiently.	<p>Implementing governance responsibilities for your estate</p> <p>Overseeing budget planning and prioritising expenditure</p> <p>Ensuring value for money from the estate</p> <p>Procuring appropriate estate services</p> <p>Overseeing business continuity and emergency planning arrangements</p>

3	Understanding and managing your land and buildings	<p>Understanding the legal interests, limitations and responsibilities for your estate</p> <p>Possessing a comprehensive understanding of the condition, suitability and sufficiency of the land and buildings on your estate</p> <p>Using the knowledge of your estate to inform strategic planning and decision-making</p>	<p>Ensuring clarity about the legal interests, limitations and responsibilities for your estate</p> <p>Assessing the physical condition of the school buildings</p> <p>Determining whether your estate is suitable and sufficient to meet the needs of the school</p> <p>Informing your strategic planning and budget planning processes with up-to-date and accurate information on your estate</p> <p>Overseeing the collection and analysis of property and condition data for your estate</p>
4	Performance management and sustainability	<p>Delivering effective performance management across the estate</p> <p>Ensuring energy, water and other resources are used efficiently and waste is kept to a minimum</p>	<p>Overseeing performance management of the estate</p> <p>Sustainably managing energy and water use across your estate</p> <p>Identifying opportunities to deliver efficiencies across your estate</p> <p>Pursuing collective buying opportunities</p>
5	Health & safety and compliance	<p>Ensuring your estate is safe for all users</p> <p>Ensuring that condition of the estate and supporting policies fully comply with relevant legislation and regulatory standards</p>	<p>Maintaining an up-to-date knowledge of all property-related health and safety issues</p> <p>Taking appropriate actions to minimise any avoidable risks</p> <p>Ensuring the estate complies with appropriate statutory and regulatory standards</p> <p>Ensuring responsibilities for health and safety are clearly defined, understood and allocated</p>

6	Maintaining your estate	<p>Maintaining a safe, warm and weatherproof estate, which supports good teaching and learning</p> <p>Ensuring maintenance is effectively planned and prioritised, informed by accurate and up-to-date condition data and the needs of your school's users</p>	<p>Overseeing technical assessments of the condition of your estate</p> <p>Using accurate and up-to-date data on your land and buildings to inform a maintenance strategy and plan that are fit for purpose</p> <p>Using the maintenance strategy and plan to inform strategic decision-making and budget planning</p> <p>Ensuring maintenance planning is appropriately prioritised and delivered in line with statutory and regulatory requirements, while minimising the impact on your school operations</p>
7	Managing your estate projects	<p>Ensuring all estate-related projects are clearly defined, follow approved processes, and use resources to best effect</p> <p>Ensuring all estate-related projects deliver the desired outcomes.</p>	<p>Developing and implementing processes to ensure all projects are robustly defined, appraised and prioritised</p> <p>Ensuring all projects comply with statutory requirements, reflect budgetary constraints, and are effectively planned and managed to minimise impact on your school operations</p> <p>Ensuring all projects meet strategic outcomes and time and cost requirements</p>

Competency levels

This framework includes competency levels to reflect the various levels of roles and responsibility for estates management in the school environment. This ranges from operational responsibility for specific tasks, to strategic responsibility including planning and leadership.

Throughout the framework, we have defined 4 competency levels, designed to provide an overview of the capabilities, skills and knowledge required at all levels of the estate workforce.

Competency level 1: Operative

Undertakes defined site-specific tasks and functions. Responsibilities may include day to day repairs and minor works, daily site checks, and opening and closing of site.

Roles at this level might include caretaker, office assistant, site assistant or facilities assistant.

Competency level 2: Supervisor

Undertakes and ensures site-specific tasks and functions are conducted effectively. Responsibilities may include being the first point of contact or reporting of premises or site issues, identifying, and addressing training needs, and supervising staff at level 1.

Roles at this level might include office manager, facilities team leader, assistant manager, or supervisor.

Competency level 3: Manager

Conducts some planning and reporting of estates activities, and may manage others. Responsibilities may include developing and managing delivery of the asset management plan, management of estate projects, managing health and safety compliance, and managing estates staff.

Roles at this level might include estate manager, business manager, premises manager, contract manager or maintenance manager.

Competency level 4: Strategic

Leads strategic planning of the estate and is responsible for all estates activities. Responsibilities may include strategic planning, responsibility and accountability for the school estate, ensuring estate matters are considered at senior or board level.

Roles at this level might include estates director, regional director or head of estates.

The levels and roles we have defined are intended to provide awareness of the relevant functions and to help recognise the different activities and responsibilities that individuals may undertake.

Schools and responsible bodies will have people in place to manage their estates according to their individual needs and circumstances. They will not necessarily have a person for every level, and many school estate practitioners may not operate exclusively according to these individual levels. For example, some settings may have one person responsible for managing the estate whose role includes both strategic responsibility and operational delivery. The levels and roles we have defined are intended to provide awareness of the relevant functions and to help recognise the different activities and responsibilities that individuals may undertake.

Strategic estate management

Taking a strategic approach across the whole organisation linked to your organisation's business planning. Having the right plans and documents in place to make sure the estate supports your education needs and goals.

Strategic approach to the way the estate is managed

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Undertakes relevant activities identified in the estate strategy and asset management plan	Supervises the delivery of activities identified in the estate strategy and asset management plan	Helps to develop the estate vision, strategy and asset management plan to support the organisation's needs and requirements	Sets out the estate vision, strategy and asset management plan to support organisation's needs and requirements
Identifies and escalates concerns about areas for improvement on the estate	Identifies areas for improvement on the estate	Manages the programming and delivery of activities identified in the asset management plan	Ensures the strategic and operational management of the estate supports the organisation's educational priorities
Undertakes training as required	Identifies and addresses training needs of operative staff	Manages the allocation and procurement of resources to undertake all estates related activities	Coordinates and manages reviews of the estate strategic documentation to ensure they meet organisational and educational requirements, deliver value for money, and effectively prioritise expenditure

Understands and follows leadership structure and governance processes	Assists with assessments to ensure all space is used effectively	Supports the assessment and analysis of data to ensure all space is used effectively and identify opportunities for improvement	Oversees the assessment and analysis of data to ensure all space is used effectively and identify opportunities for improvement
-	Ensures operational working practices are actively and consistently applied across the estate to reflect the organisation's strategic approach	Supports the development, promotion and implementation of strategic estate management within the organisation	Develops and drafts policies, procedures and training programmes to set organisational standards in the way the estate is managed and operated
-	-	Assists in developing and drafting policies and procedures to set and meet organisational standards in the way the estate is managed and operated	Completes regular reviews and updates of asset management plan and other strategic documents to ensure educational site needs and requirements are being met
-	-	Oversees the delivery of staff training	Ensures that appropriate building and site data is maintained and kept up to date to ensure informed decisions are made on project prioritises across the estate

-	-	Communicates planned projects within asset management plan with key stakeholders	Ensures that appropriate building and site data is maintained and kept up to date to ensure informed decisions are made on project prioritises across the estate
-	-	Monitors and maintains building and site data including condition surveys, asset registers and maintenance information to feed into the asset management plan and priority list of projects	Ensures that any changes to the estate i.e., new schools or blocks are subject to due-diligence inspections and are added to strategic estate documents
-	-	-	Works with financial department to make best use of available budgets including any surplus funds
-	-	-	Identifies and makes best use of all funding opportunities

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Working knowledge of the estate	Good working knowledge of the estate	Experience in managing programme of works and monitoring performance against agreed time and cost targets	Experience of strategic planning and can translate organisational objectives into the estate strategy and asset management plan
-	Understands the principles of space requirements, allocation and utilisation in a school environment	Experience of planning, prioritising and scheduling estate activities and producing a clear, documented action plan, minimising impact on the school operation	Experience of providing leadership and direction for the way the estate is managed
-	Experience of supervising operative staff on day-to-day operational activities.	Understands the organisation's long-term priorities and objectives, and how the estate supports these needs	Understands the wider context in which the organisation operates, its priorities and objectives, and how the estate contributes expenditure

Engagement with senior leadership and governing body in the management of the estate

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Provides basic information about the estate to senior leadership as appropriate	Communicates and explains the role senior leadership and governing body play in how the estate is managed	Monitors, collects and assists in producing information for reporting to senior leadership and governing body	Leads presentations and engagement sessions with leadership on key estate needs and requirements through estate data, asset management plan and priority project list
Communicate any observations or concerns from staff and wider stakeholders	Provides updates to senior leadership on activities undertaken to support strategic management of the estate	Ensures the requirements of senior leadership and governing board are understood across the estate	Leads on ensuring senior leadership and governing body are aware of their responsibilities and role in managing the estate
Follows governance and decision-making processes across the estate	Escalates staff and wider stakeholder complaints to senior leadership	Helps develop presentations and reporting of key estate needs and requirements to leadership using estate data, asset management plan and priority project list	Manages engagement with and reporting to senior leadership and governing body to ensure their requirements are met

-	Supervises and ensures governance and decision-making processes are followed across the estate	-	Ensures governing boards and senior managers are consulted on estate matters in accordance with organisational planning and investment decision-making processes
-	-	-	Identifies and procures external expertise to support the delivery of strategic objectives

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Working knowledge of the role that senior leadership and governing body play in how the estate is managed	Understands the role senior leadership and governing body play in how the estate is managed	Understands the roles and responsibilities of senior leadership and governing body in the strategic and operational management of the estate	Experience of providing leadership and direction for the way the estate is managed
-	Understands the approval processes for estate activities	-	Experience of providing accurate data to inform and support senior leadership and governing board in undertaking their strategic roles

-	-	-	Understands the need to enhance the strategic delivery with additional external expertise
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Policies, strategies and action plans

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Conducts activities in accordance with organisational estate-related policies and procedures	Ensures operative staff carry out their activities in accordance with organisational estate-related policies and procedures	Supports the development of the estate strategy and asset management plan	Leads on the development, production and review of the strategic estate documentation
Ability to conduct any operative action plans	Undertakes appropriate actions identified within the strategic documentation, particularly the asset management plan	Monitors, collects and assists in producing information to inform the development and review of the asset management plan and other strategic planning documents	Leads on resource planning to deliver the estate strategy and asset management plan activities as part of organisational business planning
-	-	Maintains the asset management plan to reflect activities undertaken	Ensures strategic documentation is approved at governing body and senior leadership level and is effectively communicated across the organisation

-	-	Works with stakeholders to ensure they have a comprehensive understanding of estate functions and policies	Undertakes annual review of the asset management plan, updates and plans future activities and identifies and reports resource implications
-	-	Works closely with finance department to ensure suitable vetting and checks are in place for all contractors before purchase orders are raised	-

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Working knowledge of estate-related policies and procedures relevant to operative functions	Understands the different policies, strategies and action plans in place and their purpose in managing the estate	Experience of managing programme of works, maintaining asset management plan, and undertaking annual reviews	Ability to think strategically about the future of the estate and translate the vision into the strategic estate documents
-	Experience of supervising operative staff on programme of works	Understands the process to develop and the purpose of strategic estate documents	Ability to set goals and objectives for the estate, manage performance, and report at governing body level

-	-	-	Experience of identifying and planning resource requirements to implement approved estate activities
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Planning and organising your estate resources

Ensuring the policies and procedures in your organisation help you manage the estate effectively and efficiently.

Implementation of governance responsibilities for the estate

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Conducts day-to-day activities in accordance with the organisations chain of command	Ensures that operative staff understand and adhere to leadership and governance processes and procedures within the organisations	Helps define roles and responsibilities, reporting lines and levels of authority within the organisation's leadership and governance structure	Leads on establishing and overseeing the governance rules and procedures through which the organisation's objectives are met
Follows and adheres to leadership and governance processes and procedures	-	Ensures that governance rules and procedures are followed at the operational level in line with the organisation's objectives and industry and regulatory standards	Takes full responsibility for compliance with governance arrangements
Escalates concerns or issues across the estate as required	-	-	Assigns roles, responsibilities and levels of authority to appropriate personnel

-	-	-	Sets out training plans based on roles and responsibilities of personnel across the estate and wider organisation
-	-	-	Leads on establishing and overseeing the governance rules and procedures through which the organisation's objectives are met

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Awareness of chain of command within the organisation	Experience of giving appropriate challenge to ensure that work is effectively managed within governance arrangements	Experience of ensuring appropriate escalation and delegation with clear accountabilities across the organisation	Experience of implementing and overseeing appropriate escalation and delegation systems with clear accountabilities
Experience in working within set processes and procedures	Working knowledge of the organisation's governance arrangements	Experience of implementing and overseeing effective risk management systems that align with governance arrangements	Experience of implementing and overseeing effective risk management systems that align with governance arrangements

-	-	Knowledge of how roles, responsibilities and levels of authority support effective governance and decision-making	Experience of communicating how roles, responsibilities and levels of authority support effective governance
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Budget planning and prioritisation of expenditure

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Identifies and escalates estate issues and condition risks early	Acts promptly to deal with estate issues and condition risks	Identifies capital budget requirements to align with strategic plan priorities	Uses financial data to interrogate income, expenditure and resource allocation, ensuring alignment with the strategic plan
Works within set processes and procedures relating to the management and operation of the estate	Makes sure work is approved and signed off in line with set processes and procedures as necessary	Prepares financial data to inform revenue budget planning	Takes responsibility for mitigating risk across the estate
Follows governance standards regarding value for money and approvals for spending within set value bands	Helps to keep track of spending across the estate in line with available budgets	Ensures that all budget submission deadlines are met	Ensures the organisation has a process for resource allocation and focuses allocations on impact and outcomes

-	Ensures governance standards are adhered to regarding value for money and approvals for spending within set value bands	Supports investment need forecasting for the short, medium and long term	Forecasts investment need in the short, medium and long term based on key estate needs and priorities
-	-	Supports the implementation of effective budgeting policies and procedures	Ensures budgets comply with all statutory regulations
-	-	Supports the delivery of asset management plan and ensures updates are undertaken to budgets and key priority projects based on up-to-date data	-

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands how to identify and escalate estate related risks	Understands how resources are used and how it impacts budget planning	Experience of managing and mitigating risk across the estate	Experience of setting and managing budgets in line with audit requirements and within strict timescales
-	Understands the principles of budget management and how these are used in the organisation	Understands how to use resources efficiently to gain best value and improved risk management	Experience of implementing a financial strategy and plan which aligns with the estate vision

-	Experience of identifying and addressing risk across the estate	Understands how to prepare and present performance and financial data	Experience of leading on risk management and mitigation at an organisational level
-	-	Understands how to work with condition and wider estate and cost data to monitor and update asset management plans and priority project lists	Knowledge of all statutory requirements that impact budgets
-	-	-	Experience of developing asset management plans and priority projects based on estate data and key needs

Ensuring value for money from the estate

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Follows appropriate control or authorisation processes for work, services or resource use	Challenges others appropriately where they see wastage and raises with team or manager as appropriate	Supports the implementation of financial policies and procedures across the organisation	Takes responsibility for financial accountability across the organisation
Escalates key risks or concerns	Ensures recognised financial procedures and practices are being followed	Participates in the organisation's self-evaluation of activities relating to financial performance, efficiency and control	Monitors resources against budgets and identifies and flags up variances

-	-	Uses control and governance procedures and practices appropriately to ensure operatives use resources efficiently and keep wastage to a minimum	Conducts regular revenue expenditure reviews to improve value for money
-	-	-	Identifies opportunities to generate income through the estate
-	-	-	Drives good practice across the organisation to ensure value for money is being achieved at all levels

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands the importance of value for money and avoiding waste	Experience of challenging the use of resources to achieve value for money and sustainable ways of working	Knowledge of financial policies and procedures and how they drive value for money and waste reduction across the organisation	Experience of driving financial efficiency and waste reduction across the organisation

-	-	Ability to be rigorous in questioning whether enough being done to drive financial efficiency and waste reduction	Understands how to interrogate financial and performance data at a granular level
-	-	Experience of collecting financial and performance data so that it is accurate, easily located and usable	Knowledge of funding arrangements, streams and mechanisms to ensure financial accountability
-	-	Experience in undertaking and working with external third parties and specialists for the development of budget estimates, option appraisals and feasibility assessments	Understands how to interpret budget monitoring information and communicate this clearly at an elevated level to others

Procurement of estate services

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Assists and supports external contractors on site to ensure procurement requirements are met	Supervises and supports external contractors on site ensure procurement requirements are met	Ensures procurement requirements are understood and met by all personnel on site staff	Coordinates and develops an efficient and effective organisational procurement strategy

-	Supports the maintenance of recognised control procedures and contract management practices	Ensures compliant routes are being adhered to for the procurement of services, works and supplies	Reviews and changes how services are procured to ensure better outcomes for the organisation
-	Raises issues when visible drift from agreements and contracts is observed	Checks suppliers and partners are providing relevant and timely data to manage and monitor contracts effectively	Takes responsibility at an organisational level for commercial confidentiality, data security and all other relevant regulations and requirements in contracts
-	-	Contributes to the early specification of client briefs to ensure full understanding of the requirements	Leads on entering commercial arrangements knowingly, having the correct authority to do so and understanding the implications

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Experience of working with external contractors on site	Experience of supervising external contractors on site	Experience of managing works and services contracts to ensure performance expectations are met.	Experience and knowledge of setting out procurement strategies for the purchasing of works, services and supplies

Experience in adhering to set procedures and guidance for procurement	Ability to challenge suppliers where slippage occurs	Good knowledge and experience of suitable procurement routes for services, works and supplies	Experience of overseeing procurement for estate services from early specification of client briefs to project completion
-	Awareness of what live contracts on site are expected to deliver	Understands and contributes towards the organisation's procurement, funding and approvals processes	Experience of taking prompt and effective action where there is slippage on key performance indicators mid contract
-	Good level of experience in adhering to set procedures and guidance for procurement	Can identify when deliverables and/or services derived from a commercial arrangement are not being delivered to the required level of quality or standard and take appropriate action	Understands commercial confidentiality, data security and all other relevant regulations and requirements in contracts
-	-	-	Understands pipeline and forecasting to plan and drive future procurements

Business continuity and emergency planning

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands and follows business continuity and emergency plans	Supports the implementation of business continuity and emergency planning processes	Oversees the implementation of business continuity and emergency planning processes	Leads the development, implementation and monitoring of business continuity and emergency planning processes
Participates in testing contingency and emergency plans and helps report outcomes	Ensures staff with business continuity responsibilities regularly rehearse their roles to test and validate the business continuity plan	Helps to identify, analyse and evaluate risks to be covered by business continuity and emergency planning processes	Ensures the business continuity plan covers the impact of premises-related emergencies
-	Produces feedback on testing of contingency and emergency plans	Identifies the key personnel or external specialists to delegate and manage the business continuity plan	Ensures that all internal and external stakeholders are aware and appointed to support with the business continuity plan
-	-	Ensures a regular reviews and updates are undertaken to the business continuity and emergency plan to capture any changes to the organisation	Identifies, analyses and evaluates risks to be covered by the plan and potential consequences of business disruption and communicates these with all internal and external stakeholders

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands what to do when contingency and emergency plans are tested or implemented in the event of a business disruption	Awareness of business continuity and emergency planning processes in place across the organisation	Experience of testing and implementing business continuity and emergency planning processes in the event of a business disruption	Experience of leading and developing a business continuity and emergency planning processes at an organisational level
-	Ensures staff follow business continuity and emergency plans	Ability to manage business disruption and protect people/premises in an emergency	Experience of interpreting risk appetite and scope to inform business continuity planning
-	-	Awareness of all stakeholders impacted by business disruption	Experience of defining the business mission, time-sensitive objectives and scope for business continuity planning
-	-	Ability to review business continuity and emergency plan and identify and mobilise competent, qualified and experienced personnel and external parties to support with key roles and actions	Ability to ensure relevant stakeholders understand what is expected of them during an emergency

-	-	Ability to develop training plans for personnel undertaking key roles within the business continuity and emergency plan	-
-	-	Ability to engage with and appoint third parties as necessary to support with the business continuity and emergency plan	-

Understanding and managing your land and buildings

Understanding the legal interests under which the school estate is held. Information you should have about your estate, and how to use it effectively. Understanding the condition, suitability and sufficiency of the land and buildings in the estate and using this to inform strategic planning and decision-making.

Understanding how the legal interests held by the school and others affect how the estate can be managed and maintained

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Operates under supervision in line with legal interests held by the school and others	Operates and supervises staff in line with set processes, practices and procedures relating to legal interests held by the school and others	Supports leadership with the development of policies, processes, practices and procedures that consider any legal interests and restrictions across the estate to ensure compliance	Leads the development of asset registers and database systems to capture and store key documentation relating to legal interests and restrictions and ensures this is kept up to date and accurate at all times
Seeks advice if needed regarding any legal ownership, interests and restrictions relating to the estate and its assets	Recognises how legal interests held by others impact and restrict the day-to-day management and operation of the estate	Is responsible for ensuring staff and third parties, such as contractors and specialists adhere to set processes, practices and procedures relating to legal interests and other restrictions when managing and operating the estate	Develops strategy and policies based on accurate and up-to-date documentation and knowledge of legal interests held across the estate

Follows and adheres to set processes, practices and procedures relating to the operation of the estate	Seeks clarification about legal interests held by others with appropriate point of contact	Manages relationships with stakeholders based on accurate and up-to-date knowledge of legal interests held by the school and others	Is aware of and can communicate all legal obligations
Helps to guide third parties, such as contractors and specialists towards relevant estate documentation and set processes, practices and procedures to ensure compliance with any restrictions and ownership requirements	Guides third parties, such as contractors and specialists towards relevant asset registers, estate documentation and set processes, practices and procedures to ensure compliance with any restrictions and ownership requirements	Provides support to leadership in capturing and ensuring key documentation relating to legal interests and restrictions is effectively obtained, stored and continuously kept up to date and accurate through asset registers and database systems	Possesses a full knowledge and understanding of the legal interests that impact estate management and maintenance
-	-	-	Develops an estate strategy which effectively captures and complies with any impacts of legal interests and restrictions
-	-	-	Is accountable for ensuring staff and third parties, such as contractors and specialists adhere to set processes, practices and procedures relating to legal interests and other restrictions when managing and operating the estate

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands the legal boundaries of the school estate	Understands the legal interests held by others that impact the estate	Experience of developing and working with asset registers and database systems for estate management documentation based on the legal interests and restrictions across the estate	Experience of leading and advising on strategic estate management in the context of complex legal interests and restrictions across the estate
Familiarises themselves with set processes, practices and procedures regarding legal ownership, interests, restrictions and the operation of the estate to ensure compliance	Understands the legal interests held by others that impact on the day-to-day management of land and buildings	Experience of developing and implementing organisational policies, practices and procedures with regards to legal interests and restrictions across the estate	Experience of leading on strategic development involving complex legal interests and obligations with external stakeholders
-	Gains an understanding of where key documentation is stored and held across asset registers and database systems	Appropriate communication skills to ensure that legal interests and restrictions are known, understood and followed by internal staff and external third parties	Experience in developing and implementing policies, practices and procedures relating to estate management and operation to capture and follow legal interests and restrictions

-	-	Experience of conflict resolution with external stakeholders over any legal disputes and restrictions	Experience of ensuring any operations undertaken on the estate are carried out in accordance with legal obligations and restrictions
-	-	-	Experience in leading the development of asset registers and database systems to ensure all information and documentation is kept up to date and accurate at all times

Assessing the physical condition of the buildings and whether the estate is suitable and sufficient for the needs of the school

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Carries out, records and reports premises walk-arounds and physical inspections on a regular basis	Supervises and carries out regular premises walk-arounds and physical condition inspections on a regular basis and reports on findings	Defines how estate condition data is collected safely and competently across the estate	Sets out the approach taken to produce estate condition information

Follows and ensures adherence with any statutory guidance and documentation, such as asbestos surveys and registers to ensure no breaches	Follows and ensures adherence with any statutory guidance and documentation, such as asbestos surveys and registers to ensure no breaches	Ensures that estate condition information is analysed at appropriate intervals to ensure estate is fit for purpose	Sets out the approach taken to ensure sufficiency within the estate and how this aligns with the estate strategy
Reports condition and any health and safety issues to appropriate colleagues	Supervises and engages with any third parties as required for the assessment of the physical condition of the estate	Ensures information on the sufficiency of the state is accurately produced	Commissions condition and sufficiency surveys across the estate using suitably qualified and competent persons
-	Supervises timely assessments of the sufficiency of the estate, including engagement with any third parties	Supports the development and delivery of an asset management plan and list of key priority projects based on condition needs	Leads on developing a sufficiency strategy in line with wider policy
-	Oversees the accurate collection and recording of estate condition data	Supports the development of plans to increase or rationalise existing sufficiency	Leads on engaging with stakeholders on understanding future sufficiency needs

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands and adheres to statutory guidance and documentation, such as safe asbestos management	Understands, adheres and promotes compliance with statutory guidance and documentation, such as safe asbestos management internally and to third parties	Experience of assessing estate condition and sufficiency and setting out key priorities based on available funding	Experience of leading and advising on estate condition and sufficiency and setting out prioritised based on available funding
Understands and follows correct procedures to report condition and health and safety issues	Understands how to assess the physical condition of the estate from data	Experience in working with external third parties to understand, set out and prioritise capital projects	Experience of specifying, commissioning and overseeing contractors
Ability to undertake and complete premises walk around inspection documentation	Understands how to assess sufficiency of the estate from data	Experience and understanding of the importance of asset management	Understands the school's asset management strategies and arrangements
Ability to identify visible condition risks or maintenance concerns	Understands the importance of obtaining and recording condition information	Experience of developing recording systems	Experience of leading on strategic plans to ensure estate is fit for purpose
Ability to make suggestions to support strategic and planning outcomes	Understands how to assess the physical condition of the estate from various data sources	Understands appropriate intervals for analysing sufficiency	Experience of timely and accurate reporting of estate condition information

-	Skilled in understanding how to assess sufficiency of the estate from various data sources	Experience of developing plans to increase or rationalise existing sufficiency	Experience of leading on strategic approaches and policies for increasing or rationalising sufficiency of the estate as appropriate
-	Experience of carrying out checks and providing advice and support to ensure the estate is fit for purpose	-	Experience of commissioning and collaborating with specialist third parties to understand, set out and prioritise key capital projects across the estate

Ensuring condition, sufficiency and suitability are reflected in the strategic planning and budget planning processes

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Assists with identifying condition and deterioration of the estate over time	Supports financial management processes	Oversees the delivery of maintenance and sufficiency plans	Leads on strategic planning for the maintenance and sufficiency of the estate in line with budgetary limitations and governance process
Assists with identifying areas to improve sufficiency	Supports monitoring and reporting spend against budget	Identifies and prioritises work against need and budget	Devises and ensures that asset management plans are sustainable and make optimal use of land and buildings

-	Makes suggestions for best use of resources and budget in estate planning	Identifies any potential risks and issues with forward planning of works and budgets	Develops processes for ensuring accuracy of financial reporting
-	Assists in the preparation of any required financial/ budgetary statements	Undertakes analyses of proposed works and ensures these align with budgetary constraints and priorities	Oversees progress reporting against delivery
-	Assists in the preparation and delivery of reports relating to spend against work carried out management of land and buildings	-	Leads on stakeholder engagement in understanding the estate

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands how to recognise condition deterioration	Experience of communicating and engaging with others in delivering effective forward planning	Experience of developing and delivering solutions for dealing with emerging risks and issues	Experience of directing resources to ensure they are correctly assigned to ensure delivery offers best value for money

Understands basic principles of sufficiency	Experience of ensuring that resources are used in an efficient manner	Experience of resource and budget management	Experience of developing and taking responsibility for financial reporting process and associated communication strategy
-	Understanding the role of financial/budgetary statements in estate management	Experience of producing accurate financial reporting and performance data	Experience of challenging decisions to ensure budgetary constraints are understood and being delivered against
-	-	Understands how to interpret financial reports	-
-	-	Possesses communication skills necessary to promote a value-for-money culture across the estate	-

Property data and data management

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Assists with capturing and obtaining key estate data to inform effective estate management	Supports the accurate recording of data to inform effective estate management	Ensures robust data management processes are in place to capture an accurate picture of the condition of the estate	Takes ownership of data management and is responsible for data accuracy

Aligns with data management processes and procedures	Maintains an accurate register of property condition	Reviews and updates data management processes and communicates across estate team to maintain compliance	Defines the specifications for the data management system to ensure they are appropriate and align with other systems
Works with estate database systems to upload documentation regularly	Identifies and reports on any work to be undertaken	Ensures the data management system is suitable for use and compatible with industry standard systems	Develops strategic planning of works on the estate based on evidence from the data collected
-	Supports development and collection of new data to inform decision making on the estate	Undertakes regular reviews of condition, compliance and sufficiency data to understand estate and formulate plans for both condition and sufficiency	Identifying and exploiting opportunities for future funding and planning a maintenance investment strategy
-	Works with estate database systems to upload and monitor documentation regularly	Ensures data management systems are appropriate and easy to use	Interprets and uses estate data in developing strategies for short- and long-term management of estate to reflect strategic objectives
-	-	Produces reports in required formats	Leads and takes responsibility for ensuring data management systems are appropriate for use
-	-	Supports and manages training where appropriate	Leads and takes responsibility for ensuring reported data is correct

-	-	Ensures estate database systems are working effectively and kept up to date and accurate at all times	Presents reported data to appropriate bodies
-	-	-	Leads and takes responsibility for delivery of data audit processes

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands importance of condition and sufficiency in estate management	Understands existing budgets for the management and operation of the estate	Experience of collecting accurate data for the effective management of the estate	Experience of developing and implementing accurate data management processes
Some awareness of how data management is used in estate management	Understands how the estate condition/ sufficiency and subsequent planning of required works may impact on resources and budgets	Experience of supporting the development of asset management plans and priority lists of projects based on estate data and available funding	Understanding essential and desirable specifications for data management systems
Some awareness of the importance of financial management	Understands how accurate historical data can be used in planning	Experience of developing performance data management processes	Awareness of alignment with other systems involved in data management

Basic IT skills and ability to work with estate database systems for uploading documentation	Understands the importance of accurate and up to date condition, compliance and sufficiency data across the estate for effective estate management	Understands and experience of using historical data in forward planning	Experience of evidence-based strategic estate planning
-	Experience of creating and updating data management storage systems, including historical data, in support of estate strategy	Experience of developing systems for reporting data to appropriate bodies	Experience of the development of asset management plans and priority lists of projects based on estate data and available funding
-	Good IT skills and ability to work with estate database systems for monitoring and uploading documentation	Experience of effective management of data audit processes	Experience of planning a maintenance investment strategy
-	-	Experience of delivering training	Experience of interpreting and using estate data on condition and sufficiency to reflect strategic objectives
-	-	Good IT skills and ability to work with estate database systems for monitoring, uploading and managing documentation	Possesses communication skills necessary to present reported data to appropriate bodies
-	-	-	Experience of delivering data audit processes

Performance management and sustainability

Building on our performance, maintaining and enhancing immediate stakeholders' wellbeing and creating a sustainable environment, all for the benefit of future generations.

Performance management of the estate

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Conducts routine monitoring and checks across building operations to required standards to help ensure the efficient use of buildings	Ensures operational staff understand the required level of quality to support effective estate performance	Oversees and promotes good practice operation and maintenance of the estate, across facilities and risk management systems	Develops and implements the organisation's vision for successful performance of the estate
Helps to support in the gathering of data to monitor the usage of energy and utilities	Consults with operational staff and encourages efficient use of buildings and systems to reduce energy use and achieve value for money	Informs the development of metrics and targets by which performance is to be managed	Takes responsibility for ensuring estate, facilities and risk management systems are in place to ensure the use, availability, lifespan and value of built assets
Promptly escalates any performance slippage or issues identified to supervisor	Promptly reports any deviations, risks and issues concerned with energy and operation of the estate to management	Updates performance delivery records on a routine basis	Leads on developing metrics and targets by which performance is to be managed

Monitor and implement good user practices such as switching off lighting or heating systems when not in use	Supports good practice operation and maintenance of the estate, across facilities and risk management systems	Promptly identifies negative trends in performance	Allocates responsibilities for delivery of estate performance, reporting and auditing
-	-	Promotes the efficient use of buildings to help reduce energy use and achieve value for money	Ensures appropriate training plans, support and continual professional development is in place for teams with responsibilities for building operations
-	-	Manages staff responsible for delivery of estate performance, reporting and auditing	Reports on the delivery of estate management performance to the governing body and submits proposals to mitigate emerging risks of adverse performance
-	-	Regularly reviews building operations to identify opportunities for improvement	Sets out and develops processes, procedures and practices for the efficient use of buildings across the organisation
-	-	-	Leads behavioural frameworks and user guidance across the organisation on the importance of efficient building operation

-	-	-	Develops innovative ideas and proposals that will encourage and promote efficient use of buildings
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Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Basic understanding of the importance of effective estate performance and value for money	Understands the scope of facilities management operations required to support effective estate performance	Experience of facilities and premises management	Experience of developing, communicating and implementing an organisational vision for achieving successful performance and value for money
Basic understanding of the efficient use of buildings to help reduce energy and achieve value for money	Good understanding of the efficient use of buildings to help reduce energy and achieve value for money	Detailed understanding of the efficient use of buildings and systems to achieve energy efficiency	Knowledge of sustainable technologies and their benefits
Basic understanding of how to operate building systems and controls (such as heating systems and building management systems)	Good understanding of how to operate building systems and controls (such as heating systems and building management systems)	Knowledge of how to measure building and energy performance and identify opportunities for improvement and savings	Experience of developing robust metrics to accurately monitor performance and identify slippage

-	-	Understands how a strategic vision for estate management can be implemented and operationalised	Knowledge of strategic thinking, innovation and planning to optimise the use, capability, availability and lifespan of built assets
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Operating efficient buildings by actively managing energy and water use

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Reports leaks and faults to supervisor	Supervises and actions any reported works	Actively supports site users in understanding how to reduce energy consumption, minimise waste and enable cost-effective recycling	Ensures that data management activities for sustainability are planned and delivered to meet organisational needs
Takes readings as directed	Supervises the efficient use of utility supplies and waste outputs on the estate	Manages and maintains systems and resources to provide routine information on consumption of utility supplies and waste outputs across the estate	Leads on developing and implementing a strategy to meet and exceed net-zero commitments
Gains a basic understanding of how to operate building systems and controls to help reduce energy usage and save money	Oversees the collection of accurate data on utility usage and waste outputs	Monitors safety in use of new energy-efficient and waste-handling practices.	Defines, communicates and implements the organisation's vision, targets, policy and new operating procedures to deliver successful sustainability

-	Has a good understanding of how to operate building systems and controls to help reduce energy usage and save money	Manages delivery of planned works to reduce waste	Allocates responsibilities for delivery, monitoring and auditing of sustainability activities
-	-	Ensures correct documentation and training is in place to enable buildings and assets to be operated and maintained as intended	-
-	-	Promotes sustainable use measures to building/site users	-

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Ability to identify leaks and faults with systems and equipment	Experience of supervising the efficient use of energy and water	Experience of implementing and monitoring energy-efficiency and waste-handling practices	Experience of developing, communicating and implementing an organisational vision for successful sustainability

Undertakes training and gains a good understanding of building systems and controls	Experience of maintaining records on energy and water use and waste	Experience of providing routine management information on utility supplies and waste outputs	Ability to develop clear plans, identifying and assigning competent resources for the delivery of sustainable solutions and audited status
Understands how to take utility and water readings from meters	Training on building systems and controls to ensure they are operated and maintained in line with manufacturer/ industry requirements	Knowledge of management activities required to deliver sustainability	Ability to proactively identify options to improve utility and water use and waste management outputs
-	-	Awareness of sustainability principles affecting the estate	Up-to-date knowledge of sustainability policies and regulations affecting the estate
-	-	Good knowledge of statutory compliance and effective building maintenance	-

Looking for opportunities to deliver efficiencies across the estate

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Complies with any behavioural change programme led by the organisation's senior management as appropriate	Supports any behavioural change programme led by the organisation's senior management	Undertakes data management activities to evaluate the delivery of efficiencies across the estate	Leads on developing, communicating and implementing an estate strategy to achieve viable and consistent sustainability and performance
Becomes familiar with operation and maintenance (O&M) manuals and attends handovers with contractors to ensure buildings and assets are operated and maintained as intended	Supports operative staff in meeting expected standards for delivering efficiencies across the estate	Undertakes efficiency and risk assessments of the estate	Obtains and analyses effective estate data to inform the potential for new and revised targets and to ensure planned expenditure is suitably prioritised
-	Attends handover meetings with contractors and reviews operation and maintenance (O&M) documentation to ensure buildings and assets are operated and maintained as intended	Promotes adherence to good estate management for schools' guidance	Plans for, obtains appropriate approval and leads on engaging with all relevant stakeholders needed to enable effective change

-	-	Proactively collaborates with suppliers and other parties to review usage and identify cost and reduction opportunities	Uses applicable benchmarks and sets targets to successfully drive efficiencies in estate delivery and operation
-	-	Ability to develop proposals to senior management that will enable cost and energy reductions to be achieved	Sets out and leads the implementation of key priorities and drivers that will reduce carbon and energy use across the estate
-	-	-	Proactively researches and pursues new funding opportunities to improve sustainability

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Basic understanding of why delivering efficiencies is important to the estate	Ability to promote efficient use of facilities, resources, utilities and waste-processing by operative staff	Experience of managing the application of revised estate content and operations as planned	Experience of developing, communicating and implementing an organisational vision for delivering efficiencies

Attends and undertakes basic training on efficient use of buildings	Awareness of how climate change affects the school estate	Ability to use appropriate management style to support the implementation of change across the organisation	Experience of scrutinising and challenging proposals, then securing approvals to deliver change
Make note of any identified or reported efficiencies and share this information with supervisor	Good knowledge and experience of operating building systems and controls (such as heating systems and building management systems)	Awareness of how climate change affects the condition and capability of the school estate	Experience of using applicable benchmarks and setting targets to successfully drive efficiencies in estate delivery and operation
-	Champions and encourages the efficient use of buildings to all users of the estate	Promotes and encourages efficient use of buildings to all users of the estate	Up-to-date knowledge of how climate change and related government targets to affects the condition and capability of the school estate
-	Escalates any issues, concerns and opportunities for improvement to management	Ability to trouble shoot and develop proposals that will address any concerns with energy use and cost across the estate	Awareness of available funding opportunities to offset the impact of climate change on the estate

Exploring collective buying opportunities

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Collaborates positively with external partners, such as contractors, consultants and energy providers on site as required	Maintains positive relationships with supply-chain partners such as contractors, consultants and energy providers on site	Assists in exploring collective buying opportunities	Leads on developing a strategy for collective buying to access the most economically advantageous supply chains
Provide feedback to supervisor on any performance or behaviour issues identified during visits.	Reports any concerns and opportunities across energy and utilities to management	Identifies areas to secure better value for money on goods, services, works and utilities	Specifies the elements of supply chain data to be assembled and maintained by the organisation
-	-	Identifies opportunities to reduce the volume of suppliers without substantial adverse risk	Sets realistic targets for the pace and magnitude of change to be provided by collective buying
-	-	Helps to promote the effectiveness and value of new supply arrangements with internal stakeholders	Oversees the implementation of revised supply chains in compliance with current regulations in support of targeted objectives for the estate

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Experience of working with different contractors and suppliers on site	Experience of supervising different contractors and suppliers on site	Experience of supporting supply chain development and identifying collective buying opportunities	Experience of supply chain development and collective buying
-	Ability to alert management of unexpected changes in the quality and uniformity of supply	Understands current spend and technical requirements of supplies for the estate	Experience of implementing, supporting, monitoring and forecasting demand to optimise benefits
-	-	Ability to identify supply chain partners that are vital to the organisation	Ability to promptly respond to the nature of markets in which vital suppliers operate
-	-	-	Ability to convince internal and external stakeholders of the opportunity and need for collective buying
-	-	-	Up-to-date knowledge of supply chain partners that are vital to the organisation

Health & safety and premises compliance

Safeguard the health & safety of users by ensuring school premises are compliant with health & safety statutory, regulatory and corporate standards.

Understanding premises-related health & safety and compliance issues

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Undertakes training and refresher sessions on health & safety/compliance on the estate and applies learning on an ongoing basis	Ensures operative staff maintain awareness of health & safety/compliance and how to report concerns	Promotes a zero-tolerance culture of health & safety/compliance breaches and safe channels to report concerns	Leads on the development and implementation of all estate-related health & safety/compliance policies and procedures including systems and support services
Identifies and reports any compliance issues or hazards	Addresses training needs among operative staff on health & safety and compliance where identified	Manages the implementation of health & safety and premises compliance policies and planning	Ensures health & safety and premises compliance is considered as part of organisational business planning
-	Promote a proactive approach to health and safety with site users and operative staff	Facilitates training and refresher sessions on health & safety/compliance	Leads competency and skills assessments, and sets out training plans to ensure all staff are trained and supported to manage and deliver health, safety and compliance duties safely

-	-	Procures and manages any health and safety related contracts and support services	-
-	-	Manages and monitors health and safety standards across the organisation	-

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands the importance of health & safety compliance in keeping the estate and its users safe from harm	Working knowledge of health & safety legislation, premises-related statutory compliance requirements, corporate standards and best practice	Detailed knowledge and understanding of health & safety legislation, premises related statutory compliance requirements, corporate standards and best practice	Full understanding of health & safety legislation and premises-related statutory compliance requirements, how they impact on the organisation and the implications of failure
Ability to communicate risks and observations with site users both formally and informally	Ability to recognise weaknesses and failings against statutory and corporate requirements in the operation of the estate	Experience of ensuring all statutory and corporate health & safety compliance requirements are met within the context of business operations	Experience of putting processes and policies in place to comply statutory requirements, based on best practice, to keep the estate and its users safe from harm

-	Understanding escalation policies for higher risk health and safety issues	Experience of working with database and reporting systems for health, safety and compliance monitoring and management	Full understanding of corporate business planning processes and ability to develop strategies and policies to meet corporate standards
-	Can communicate risks and observations both formally and informally	-	-

Taking appropriate actions to minimise any avoidable risks

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Ensures own and others' actions reduce health & safety compliance risks	Ensures own and others' actions reduce risks and comply with health & safety compliance requirements	Ensures own and others' actions reduce risks and comply with health & safety compliance requirements, actioning or escalating concerns as appropriate	Develops and implements clear processes to conduct suitable and sufficient assessment of risk
Escalates concerns where appropriate	Ensures all concerns are actioned or escalated as appropriate	Collects and collates risk information for reporting and escalates any hazardous situations or defects in premises or equipment	Develops and implements escalation processes, communicating at appropriate levels in the organisation to ensure remedial actions are taken

Knowledge to effectively cordon off and make safe any potential risks where and if required	Completes regular site reviews to ensure any risks are recorded and rectified	Ensures appropriate risk assessments are in place for all departments	Sets out targets for performance to identify potential risks to enable continual improvement
-	-	-	Ensures sufficient resources are allocated to operate compliance management systems

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Working knowledge of health & safety risks associated with use and occupation of premises	Understands health & safety risks associated with use and occupation of premises	Detailed knowledge of health & safety risks associated with use and occupation of premises	Comprehensive, up-to-date knowledge of health & safety legislation and premises compliance affecting the use and occupation of premises
Ability to report concerns both formally and informally	Understands the importance of accurate risk recording	Understands the importance of accurate risk recording	Experience of developing and leading an organisational culture in which health & safety and premises compliance are prioritised, informing strategy, planning and decision-making

Ability to apply health and safety logic to help to reduce risk	Ability to recognise weaknesses and failings against statutory and corporate requirements in the operation of the estate	Ability to recognise weaknesses and failings against statutory and corporate requirements in the operation of the estate	Experience of communicating and directing implementation of policies and procedures and managing non-compliance
-	Ability to challenge and report concerns	Ability to challenge, take appropriate actions or escalate concerns	Critically evaluates risk and incorporates into corporate risk and business planning processes
-	-	Ability to effectively communicate and engage with various internal and external parties regarding health, safety and compliance matters	Competent in analysing and reporting information as part of business planning and budget planning processes
-	-	-	Excellent communication skills and ability to liaise and work with internal and external parties on health, safety and compliance matters

Ensuring the estate complies with appropriate statutory and regulatory standards

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Undertakes training and refresher sessions on the actions required to ensure statutory and regulatory standards and applies learning on an ongoing basis	Undertakes training and refresher sessions on the actions required to ensure statutory and regulatory standards and applies learning on an ongoing basis	Undertakes training and refresher sessions on the actions required to ensure statutory and regulatory standards and applies learning on an ongoing basis	Defines reporting criteria to meet statutory and corporate performance needs in respect of health & safety and premises compliance
Completes and maintains an up-to-date log of tasks and walk-rounds	Ensures operative staff maintain awareness of health & safety compliance, statutory and regulatory standards and how they are met	Informs and implements an action plan to ensure all statutory and regulatory standards will be met in accordance with required timescales	Leads on the implementation of an action plan, ensuring sufficient resources and prioritised programming to meet all statutory and regulatory standards and the needs of the organisation
-	Addresses training needs among operative staff on statutory and regulatory standards and how they are met where identified	Supports the development and production of management reports on health & safety and premises compliance	Leads on the procurement and resourcing of required expertise to fulfil regulatory requirements
-	Ensures up to date logs of tasks and actions relating to health, safety and compliance are undertaken and recorded	Supports procurement of technical expertise to ensure statutory and regulatory standards are met	Produces management reports to demonstrate compliance performance, highlight risks and identify remedial options for governing body

-	-	Leads on procuring appropriate training packages and database systems for health, safety and compliance monitoring and management	-
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Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands the importance of health & safety/compliance statutory and regulatory standards and how they are met	Working knowledge of health & safety/compliance statutory and regulatory standards and how they are met	Detailed knowledge and experience of premises compliance elements, statutory and regulatory standards and frequencies	Ability to evaluate risk and prioritise programme of works and ensure sufficient resource is identified and allocated
-	Understands the importance of audit trails and evidence recording	Experience in managing programme of works and monitoring performance against agreed targets	Detailed knowledge of competence required for all technical elements of premises compliance. Ensures these are met through appropriate procurement of expertise or training
-	-	Awareness of competencies required for all technical elements of premises compliance	Experience of procuring technically competent resource to fulfil statutory requirements

-	-	-	Experience of developing and implementing monitoring and reporting systems to ensure all statutory and corporate reports are delivered and actioned
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Ensuring responsibilities for health & safety and premises compliance issues are clearly defined and designated

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Carries out general responsibilities for health & safety and premises compliance across the whole estate	Ensures general responsibilities for health & safety and premises compliance are carried out appropriately by operative staff across the whole estate	Drafts policies and procedures to ensure all duties and responsibilities are defined and that roles for each are specified and documented	Leads on ensuring a safe culture of working across the organisation
Ensures that permit systems, and risk assessments and method statements (RAMS) are provided by external contractors	Maintains up-to-date records of designated roles, allocations of responsibilities and training	Reviews records, actions any issues or gaps and escalates any failings	Ensures all persons responsible for health, safety and compliance roles are suitably trained and supported

-	Ensures that permit systems and risk assessments and method statements (RAMS) are obtained by external contractors and reviewed	Sets out and delivers communication plans across the organisation to ensure all parties are aware and comply with policies and procedures	Leads on the corporate reporting of any issues and ensures risks are escalated and actioned accordingly
-	-	Promotes and advocates a safe culture of working across the organisation	Produces management reports to demonstrate compliance performance, highlight risks and identify remedial options
-	-	-	Leads and develops communication plans across the organisation to ensure all parties are aware and comply with policies and procedures

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands the importance of health & safety compliance, statutory and regulatory standards and how they are met	Working knowledge of health & safety and statutory premises compliance roles and responsibilities	Detailed knowledge and experience of health & safety and statutory premises compliance roles and responsibilities	Experience of leading on and communicating health & safety and statutory premises compliance roles and responsibilities

-	Understands the importance of audit trails and evidence recording	Able to define and document health & safety and premises compliance roles and responsibilities	Experience developing and implementing corporate systems to report on health & safety and premises compliance
-	-	Able to effectively communicate and engage across the organisation and support staff development	Ability to action failure at the appropriate level of the organisation promptly and effectively
-	-	Ability to effectively communicate and work with external third parties and specialists on health, safety and compliance	Experience of developing and implementing training and support programmes to maximise health & safety and premises compliance

Maintaining your estate

Ensuring the estate is kept safe, warm and weatherproof and provides a suitable teaching and learning environment. Ensuring maintenance is effectively planned and prioritised, reflecting condition data and the needs of the organisation.

Ensuring information and data about the estate is available, current and used to prioritise maintenance, including regular assessments of the estate's condition

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Conducts and records premises walk-arounds and inspections on a regular basis	Supervises condition checks and maintenance works carried out by operative staff and external contractors	Manages the delivery of condition surveys and technical assessments	Leads on developing and implementing strategic condition and maintenance plans based on accurate and up-to-date condition and compliance data
Conducts condition checks as directed	Identifies and escalates condition and compliance risk concerns	Raises awareness of the importance of condition data and other available data in maintaining estate	Identifies the approach to develop and deliver an asset management plan
Conducts minor maintenance tasks in accordance with competency reviews and risk assessments	Supports the accurate and timely updating of records on condition, compliance and maintenance	Supports others in the delivery of condition surveys and technical assessments	Ensures any computer-aided facilities management systems are compatible with other relevant digital systems

Assists in identifying works to be undertaken and prioritised	-	Ensures records of the estate are current, maintained and accessible	Establishes how condition data should be used for the development of the estate strategy and asset management plan
-	-	Makes suggestions to inform and improve the effective operationalisation of the maintenance strategy and plan	Clearly sets out governance and approval processes across estates and operations for premises teams to follow and adhere to
-	-	Conducts and records termly premises inspections, arranging works for high priority items	-

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Experience conducting maintenance works and premises tasks, complying with health & safety, any other relevant legislation and site security/ competency assessment measures	Experience supervising operative staff conducting minor maintenance, complying health & safety, any other relevant legislation and site security/ competency assessment measures	Awareness of the importance of condition surveys and other available information in maintaining the estate	Experience of developing and implementing strategic maintenance plans based on accurate and up-to-date condition data
Ability to undertake and complete premises walk around inspection documentation	Ability to inform or challenge senior colleagues	Experience of operationalising/ implementing strategic maintenance plans	Competent in interpreting results from condition data surveys
Ability to identify visible condition risks or maintenance concerns	Awareness of the importance of accurate condition data in maintaining the estate	Experience of accurately updating condition and maintenance records	Detailed knowledge of computer-aided facilities management systems
Ability to make suggestions to support strategic and planning outcomes	-	Experience of supporting condition surveys and technical assessments	Understands how to use condition data to develop and align with strategic goals
-	-	Ability to inform or challenge senior colleagues' strategic and planning work	Experience of overseeing the provision of condition surveys and technical assessments
-	-	Experience of using computer-aided facilities management systems	-

Ensuring the maintenance strategy and plan informs strategic decision-making and budget planning

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Undertakes maintenance tasks in compliance with health & safety, any other relevant legislation and site security/ competency assessment measures	Helps ensure estate approval processes and procedures are always followed and complied with	Oversees the delivery of planned preventative maintenance and reactive maintenance within time and budgetary, time and health and safety requirements	Leads on developing and implementing maintenance policy, strategy and objectives that align with organisation-wide objectives and whole-life considerations
Assists in identifying works to be undertaken and prioritised	Supervises operative staff carrying out maintenance work in accordance with health & safety, any other relevant legislation and site security/ competency assessment measures	Raises awareness of strategic plan and budget requirements to maintenance personnel	Ensures detailed asset registers and service level agreements are in place for effective inspection, compliance and maintenance of assets
Reviews and understands building and asset operation and maintenance manuals to help ensure inspection and maintenance meet standards	Helps to ensure maintenance work is delivered in line with budgetary, time and health and safety requirements	Manages the operationalisation of lifecycle plans for assets that ensure best value for money	Responsible for ensuring lifecycle plans for assets deliver best value for money
Makes suggestions to increase value for money	Escalates any cost or risk concerns to management	Operationalises the strategic asset maintenance plan	Ensures maintenance plans align with budget and time constraints and any strategic asset management plans

-	Helps ensure estate approval processes and procedures are followed and complied with	Makes suggestions to inform and improve strategic decision-making and budget planning	Ensures provision of accurate cost plans for proposed work to allow for budgetary management
-	-	Obtains and reviews relevant compliance, maintenance and operational data that will support and inform future investment and prioritisation	Takes appropriate action where slippage in delivery of maintenance and strategic asset management plans occurs
-	-	Ensures all operation & maintenance (O&M) manuals and wider documentation is in place to ensure buildings and assets are operated and maintained as intended	Ensures building data is kept accurate and up to date to help monitor, identify and deliver works and services to maintain a safe, warm and complaint environment

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Experience of conducting maintenance works on estates and premises	Experience of supervising operative staff in conducting minor maintenance work on estates and premises	Experience of managing the delivery of preventative maintenance and reactive maintenance within budgetary, time and health and safety requirements	Experience of developing and implementing strategic asset maintenance plans and asset lifecycles in line with budgetary and time constraints

Awareness of the importance of delivering value for money	Experience of supporting preventative maintenance and reactive maintenance within time and budgetary constraints	Experience of managing the delivery of works in line with a whole-life strategy	Experience of commissioning and reviewing maintenance works/projects to ensure delivery within budget limits
Ability to make suggestions to support strategic and planning outcomes	Experience in supervising external contractors and suppliers in delivering maintenance and inspection works	Experience of informing the development of strategic asset maintenance plans	Experience of creating effective communications on the importance of strategic decision-making and budget planning
-	Ability to inform or challenge senior colleagues	Good technical knowledge of estate and facilities management	Ability to align strategic asset management plans and asset lifecycles
-	-	Awareness of the importance of lifecycle plans for assets that ensure best value for money	Understands the validity and use of strategic asset management plans
-	-	Ability to inform or challenge colleagues where slippage in performance occurs	Understands budget and limitations when dealing with maintenance issues
-	-	-	Ability to ensure building condition and compliance data is continually obtained, centrally stored and reviewed to inform future investment priorities

Ensuring maintenance is prioritised, delivered in accordance with statutory and regulatory requirements and minimises impact on the operation of the school

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Carries out maintenance works in compliance with health, safety, any other relevant legislation and site security/ competency assessment measures	Ensures operative staff conduct maintenance works in compliance with health & safety, any other relevant legislation and site security/ competency assessment measures	Monitors and manages the delivery of compliance, inspection and maintenance services across planned and reactive works in line with regulatory, statutory and site security requirements	Takes responsibility for full compliance with statutory, regulatory and site security requirements
Ensures that suitable logs are maintained for internal compliance checks	Assists in identifying works to be undertaken and prioritised	Manages compliance, inspection and maintenance service contractors to ensure they meet expected performance standards	Oversees the risk register, taking full, appropriate and timely action where risks are identified
Assists in identifying works to be undertaken and prioritised	Supports with monitoring compliance and maintenance levels and escalate any concerns where standards may not be met	Coordination, review and management of contractor quotations where applicable for compliance, inspection and maintenance services to keep buildings safe, warm and compliant	Oversees the appointment of competent contractors in line with relevant procurement regulations

Takes part in training and refresher sessions on statutory, regulatory and site security compliance requirements	Completes training and refresher sessions on statutory, regulatory and site security compliance requirements	Updates systems to measure delivery and effectiveness of maintenance regimes	Oversees control of all systems to measure delivery and effectiveness of maintenance regimes in line with asset maintenance priorities, taking immediate and proportionate action where risks are identified
Communicates with and directs service and maintenance contractors and suppliers on site	Works with estate database systems for logging, monitoring and uploading documentation	Supports the accurate and timely completion of risk registers for any works undertaken on site	Leads on developing and implementing communications strategy with school and any relevant outside bodies, taking appropriate steps to resolve any conflicts as they arise
Works with estate database systems to upload documentation regularly	-	Completes training and refresher sessions on statutory, regulatory and site security compliance requirements	Keeps abreast of the latest statutory, regulatory and site security compliance requirements affecting the school estate
Raises concerns where compliance may not be met	-	Raises awareness among maintenance staff of updates to statutory, regulatory and site security compliance requirements affecting the school estate	-

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Working knowledge of current health & safety, any other relevant legislation and site security measures affecting maintenance of the estate	Working knowledge of current health & safety, any other relevant legislation and site security measures affecting maintenance of the estate	In-depth knowledge and experience of ensuring compliance with current statutory, regulatory and site security requirements	In-depth knowledge and ability to ensure corporate-wide compliance with current statutory, regulatory and site security requirements
Ability to identify compliance risks and understand what action to take	Ability to identify compliance risks and understand what action to take	Experience of managing external contractors and taking appropriate action when issues arise	Experience of developing, implementing and monitoring risk management regimes
Basic IT skills and ability to work with estate database systems for uploading documentation	Ability to supervise external operatives contracted to delivering works and services on the school estate	Ability to mitigate and maintain awareness of risk on site	Experience of developing, implementing and monitoring effective auditing regimes for contractors
Ability to work with and communicate effectively with external contractors and suppliers	Good IT skills and ability to work with estate database systems for monitoring and uploading documentation	Good IT skills and ability to work with estate database systems for monitoring, uploading and managing documentation	Experience of taking overall responsibility for avoiding risks and keeping people safe on site
-	-	Good technical knowledge of maintenance, compliance and facilities management	Ability to effectively engage with all internal staff, external contractors and outside bodies to ensure compliance

Managing your estate projects

Ensuring the policies and procedures in your organisation help you manage your estate projects effectively and efficiently.

Developing and implementing processes to ensure all projects are clearly defined, appraised and prioritised

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Conducts maintenance works in line with estate management policies and procedures	Supervises operative staff conducting maintenance works in line with estate management policies and procedures	Supports the development of project briefs, engaging relevant stakeholders as appropriate	Options appraisals and feasibility studies for technical or investigative surveys
Raises any concerns with supervisor as appropriate	Identifies, addresses or escalates any concerns as appropriate	Gathers data to inform business case preparations	Prepares project execution plans and/or other similar management tools
-	Assists in project reporting processes	Drafts business cases for a successful project	Develops project programmes with key milestone dates
-	-	Manages project reporting processes	Decides on project team structures and appointment of consultant advisers where appropriate

-	-	Helps to ensures project compliance, with governance arrangements in place	Determines and agrees the requirements and extent of strategic project briefs
-	-	Advises on project team structures and appointment of consultant advisers where necessary	Ensures all stakeholders input into the strategic overview of project briefs, engaging with stakeholders as appropriate
-	-	Identifies, addresses or escalates any concerns as appropriate	Takes ownership of project governance including reporting procedures
-	-	-	Ensures people carrying out works are suitably qualified and have the necessary skills, knowledge, experience and competence
-	-	-	Responsible for approving and signing off the business case for a successful project
-	-	-	Researches and applies for relevant funding and grants, ensuring the financial funding model is maximised

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Awareness of roles and responsibilities during project delivery	Awareness of roles and responsibilities during project delivery	Qualified and experienced in project management	Qualified and experienced in project management
-	Understands requirements of live projects	Knowledge and experience of project management systems and tools	Knowledge and experience of project management systems and tools
-	-	Knowledge and experience of fiscal management and construction contract law	Knowledge and experience of fiscal management and construction contract law
-	-	Understands project programme planning with critical path and milestone planning	Leadership skills in planning, organising and managing projects, setting the project scope and specification
-	-	Understands financial processes for developing a project business case	Knowledge of relevant funding and grants
-	-	Ability to engage with stakeholders to develop a robust project brief	Ability to interpret the results of lifecycle/whole-life costing exercises
-	-	Knowledge and experience of feasibility studies, options appraisals and benefits analysis	Ability to engage with stakeholders to develop a robust project brief

Ensuring all projects meet statutory requirements, reflect budgetary constraints and are effectively planned and managed

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Conducts maintenance works in line with statutory requirements and budgetary constraints	Supervises operative staff to conduct maintenance works in line with statutory requirements and budgetary constraints	Manages projects in line with statutory requirements and budgetary constraints	Ensures contractual, legislative and statutory requirements are met (including planning legislation, building regulations, and Construction Design and Management Regulations)
Raises any concerns with supervisor as appropriate	Identifies, addresses or escalates any concerns as appropriate	Ensures projects are planned to minimise impact on school operations	Sets acceptable tolerances and defines the project approval route (established through project governance)
-	Assists in project reporting processes	Oversees project document control, management information and reporting as set out in the project manual	Manages project costs, ensuring that the project offers value for money and that the necessary approvals are in place
-	Helps to ensure project delivery minimises impact on school operations	Identifies and escalates significant slippage in project delivery as appropriate	Oversees any value engineering at milestones/gateway stages as necessary

-	-	Implementing change control procedures within the contract	-
-	-	Tracks any benefits management with benefits analyses	-
-	-	Oversees value engineering at milestones/gateway stages as necessary	-

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Awareness of role and responsibilities during project delivery	Awareness of role and responsibilities during project delivery	Qualified and experienced in project management with understanding of document control	Leadership skills in planning, organising, directing and controlling projects
-	Understands requirements of live projects	Fiscal management skills for negotiating cost control and reporting, including cashflow forecasting for the project	Knowledge and experience of setting the scope and specification for projects
-	-	Knowledge and understanding of the statutory and legal requirements	Fiscal management skills for negotiating cost control and reporting, including cashflow forecasting for the project

-	-	Ability to identify and engage with all stakeholders to achieve statutory approvals	Experience and knowledge of strategic financial planning for effective overview of the budget and tight cost control
-	-	-	Knowledge and understanding of the statutory and legal requirements
-	-	-	Ability to identify and engage with all stakeholders to achieve statutory approvals

Ensuring all projects meet strategic outcomes and time and cost requirements

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Conducts maintenance works in line with statutory requirements and budgetary constraints	Supervises operative staff in conducting maintenance works in line with statutory requirements and budgetary constraints	Oversees risk management of projects	Ensures project governance is in place
Raises any concerns with supervisor as appropriate	Identifies, addresses or escalates any concerns as appropriate	Ensures contingency plans are in place	Ensures quality management systems are in place with assurance, control and planning

-	Assists in project reporting processes	Records all risks and issues with mitigations	Takes responsibility for planning all resources required to deliver projects
-	-	Ensures effective cost control during the construction phase of a project	Ensures all final certification is in place for completed projects (for example, statutory, contractual)
-	-	Ensures there is appropriate and regular engagement with all stakeholders	Ensures good stakeholder management and communications are in place throughout the project

Skills and knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Awareness of role and responsibilities during project delivery	Awareness of role and responsibilities during project delivery	Qualified and experienced in project management including risk and contingency planning	Qualified and experienced in project management including risk and contingency planning
-	Understands requirements of live projects	Ability to manage risk registers and deal with emerging risks	Leadership skills in planning, organising, directing and controlling the project while setting the scope and specification for the project

-	-	Effective reporting skills in benefits analyses	Knowledge and experience of leading continuous improvement
-	-	Ability to undertake quality management processes	Knowledge and experience of applying qualitative and quantitative methods to assess risk
-	-	Knowledge applying qualitative and quantitative methods to assess risk	Effective reporting skills in benefits analyses

Post-project review and lessons learned

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Contributes to the feedback process to capture ideas for avoidance of any repetition of errors and improvement for future projects	Contributes to the feedback process to capture ideas for avoidance of any repetition of errors and improvement for future projects	Identifies lessons learned and recommends appropriate responses	Ensures building manuals are complete and address all necessary information for the smooth operation and maintenance of new buildings
-	-	Works with contractors to prepare for handover	Facilitates an open culture of review, including lessons learned

-	-	Manages regular reviews for continuous improvement, capturing best practice and areas for improvement in future projects	Sets the framework for continuous improvement reviews
-	-	-	Recommends appropriate responses and actions for future projects
-	-	-	Commissions post-occupancy evaluation

Skills/knowledge required

Competency Level 1	Competency Level 2	Competency Level 3	Competency Level 4
Operative	Supervisor	Manager	Strategic
Understands the importance of lessons learned reviews	Understands the importance of lessons learned reviews	Experience of facilitating lessons learned workshops	Leadership skills to communicate why lessons learned and continuous improvement reviews are necessary to future projects
-	Ability to encourage operative staff to openly contribute to lessons learned reviews	Ability to encourage open discussions to get the best feedback from the project team	Ability to encourage open discussions to get the best feedback from the project team

-	-	In-depth knowledge of continuous improvement principles and practice	Experience of facilitating lessons learned and continuous improvement workshops
-	-	-	In-depth knowledge of continuous improvement principles and practice



Department
for Education

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