



# Estates Policy

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Responsible Director	Director of Finance
Responsible Manager (Sponsor)	Assistant Director Estates, Fleet & FM
For use by	All Trust Employees

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## Change record form

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2.0	22 Feb 2011		D McNichol	Amendments made from Mersey audit comments
2.1	3 Mar 2011		P Buckingham	Drafting amendments at request of Director of Finance
2.2	15 Mar 2011		N Maher	Amendments made from recommendations
2.3	23 Mar 2011		K Bamford	Amendments to reflect SPPC documentation from EMT approval
2.4	24 Apr 2014		D McNichol	Reviewed and updated for comment
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4.0	29 January 2019	29 January 2019	N Maher	Review approved by DoF
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## 1. Introduction

### 1.1. Purpose

NWAS aims to have a built estate which provides a workplace to staff which is safe, fit for purpose, well maintained and efficient. There are many strands to the delivery of a quality estate and the services within it.

With this aim in mind, the Estates Policy defines responsibilities and accountability within the Trust for the delivery of a quality estates function, promoting partnership working with other departments and stakeholders in the Trust.

The policy will be monitored periodically and if necessary will be amended to take account of future service developments and to ensure that the management of the NWAS estate is optimised to support the delivery of patient care.

## 2. Responsibilities

### 2.1. The Chief Executive

The chief executive is accountable for the management of services provided by the Trust. With regard to estate and facilities, the chief executive has three distinct responsibilities:

- strategic management of assets – regular review of their productivity, cost and fitness for purpose, and subsequent rationalisation and investment;
- operational maintenance of assets – ensuring that the condition of the estate is assessed and reported on regularly, and assets are high-quality, appropriate and safe for day-to-day use;
- ensuring that all statutory obligations are identified and met.

### 2.2. The Director of Finance

The director of finance is the executive director with board level accountability for the estate. Specific accountability for estate management is delegated to the assistant director of estates and fleet.

### 2.3. The Assistant Director of Estates, Fleet & FM

The assistant director of estates, fleet & FM has delegated responsibility for the overall estate, and the development, maintenance and implementation of the Trust's Estate Strategy.

### 2.4. The Head of Estates

The Head of Estates has overall responsibility for the Estates Management team. This includes accountability for the delivery of the annual capital programme, both operational and strategic capital schemes in addition to the monitoring and delivery of day-to-day maintenance services particularly managing the performance of the Hard FM Services contracts ensuring compliance with statutory standards and recognised safe practices.

In collaboration with the operational departments, the Head of Estates plays a key role in strategic and operational Estates change management programmes and key projects for the Trust, and to ensure the Department achieves its roles and objectives.

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## 2.5. The Estates Manager (Operational)

Has a lead responsibility to ensure that, from an operational point of view, the Trust's premises meet legal requirements and are compliant with regard to current statute and guidance. This includes asbestos management, legionella management, electrical testing and all other relevant planned preventative maintenance and statutory tests. The estates manager (operational) will ensure that suitable contracts for the delivery of reactive and planned maintenance services are in place at all times.

## 2.6. The Estates Manager (Capital Projects)

The estates manager (capital projects) has a lead responsibility for strategic investment in the development of the Trust's estate to ensure that buildings meet changing operational needs and are therefore fit for purpose. This will include the management of a programme of condition surveys to identify and prioritise investment in addressing backlog maintenance along with overall programme management of all estate capital schemes to ensure all new works are efficient in terms of value, future maintenance requirements and comply with relevant HTM/ HBN's. The estates manager (capital projects) will be responsible for monitoring the progress of agreed schemes and will prepare and produce reports to inform Trust senior management.

## 2.7. Environmental/Sustainability Manager

The Environmental/Sustainability Manager has lead responsibility for the strategic approach to sustainability. This will include carbon reduction, energy performance and waste management. The estates manager (environmental) will be responsible for managing and monitoring the operation of the estate with regards to impact on the environment.

## 2.8. Estates Managers (All)

The estates managers will ensure that all buildings and associated equipment falling within their designated geographical control are in a safe operational condition, are fit for purpose, meet the recommended standards and statutory requirements and that appropriate maintenance and inspection records are held centrally available to the department.

## 2.9. Estates Project Managers

The estates project managers are responsible for the planning, project management and procurement of multi-stranded projects for the estates department from inception to completion. This would be capital projects & other estates related corporate projects for the Trust, including the management of professional consultants and sub-ordinate project staff, encompassing scheme feasibility studies and management of project scope, timescales/schedules and the development of internal and external resource strategies.

## 2.10. Head of Facilities Management (FM)

The head of facilities management is responsible for the delivery of consistent and common Trust-wide approach to key business systems and procedures such as; premises cleaning, ID badge management, tracked mail as well as the full building management of all corporate sites, which includes oversight of the Trust's clear desk policy (Simple Steps to Smarter Working). The Trust has a centralised estates and FM helpdesk which is managed by head of FM ensuring that an audit trail is provided for all maintenance and compliance matters.

In collaboration with the communications team, the Head of FM is responsible for the development and delivery of the Trust's corporate identity and branding, ensuring that it is in line with the NHS England guidance and requirements.

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### **2.11. The Office and Meeting Accommodation Group (OMAG)**

The OMAG is responsible for managing the allocation of office space and meeting rooms in line with the Trusts Agile Working Policy and Estates Strategy, following consideration of recommendations from the Head of FM. The purpose is to ensure the allocations of space reflects the Trust's overall priorities and maximises the use of the Trust assets.

### **2.12. The Procurement and Supplies Department**

The procurement and supplies department has the responsibility for ensuring that Trust estates services are procured via a legally tendered procurement route and that the Trust's standing financial instructions are complied with. This will include national, regional and negotiated framework and contract agreements. A collaborative approach will be adopted between estates and the supplies department.

### **2.13. The Health, Safety and Security Department**

The health, safety and security department has the responsibility for ensuring that all staff are aware of their duty to assist in ensuring that Trust buildings are maintained in a safe and acceptable condition. This will include the reporting of building defects via completion of routine health and safety workplace inspections and also the day-to-day reporting of building defects via the appropriate estates helpdesk route. Appointed staff will also be responsible for carrying out certain routine preventative measures such as fire alarm testing etc. This will be by agreement as detailed in the A&E instructions.

The health, safety and security department also has a key relationship with the estates team in that much of the work which they carry out in relation to health and safety, fire safety and security has a direct impact on the estates function. Close collaboration is therefore essential to this relationship

### **2.14. Sector and Operational Managers**

Sector and operational managers are responsible for ensuring that Trust buildings are used and managed in line with Trust policy and legal obligations. This will include ensuring that staff are aware of their duty to report building defects through the appropriate channels and also to keep and use the buildings in a safe and appropriate way, including overseeing the day to day cleaning arrangements for premises and ensuring cleaning frequencies for their sites are publically available.

Operational managers also have a key relationship with the Trust estates managers in respect of discussing and agreeing priorities for capital improvement works and also highlighting any other issues such as recurring problems/defects.

### **2.15. Trust Employees**

Trust employees have a duty to act in accordance within Trust procedures, to comply with reporting systems with regard to building and plant faults, to carry out routine building safety checks including quarterly health and safety inspections, fire alarm testing etc as defined.

### **2.16. Corporate Programme Board (CPB)**

The purpose of the CPB is to oversee the delivery of the trust portfolio incorporating key trust projects and programmes which encompasses strategic estates projects. CPB provide leadership and governance, through clear reporting processes, for the above projects so that their progress supports delivery of annual strategic implementation plans.

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### 2.17. Estates Oversight Forum (EOF)

The purpose of the EOF is to oversee the delivery of the Estates Strategy and Hub and Spoke Strategic Implementation Plan, including all ongoing and future projects taking place within the organisation alongside actively measuring the key performance metrics associated with the strategy. This will ensure that all estate and fleet strategic developments are collectively managed, remain closely aligned to other NWS strategies and are adequately resourced to be able to deliver the benefits. The EOF is a non-executive working group of the CPB and has no executive powers, other than those specifically delegated within these terms of reference.

### 2.18. The ICT Department

The ICT department is responsible for providing project assistance for estates minor works and capital improvements where data and/or telephone cabling and equipment may require procurement or relocation.

The estates team would also work in collaboration with the ICT department in relation to planned works at key sites such as control rooms, mast sites and in particular where interruptions to power supplies are proposed.

### 2.19. Finance Department

All options for maintaining and delivering a fit for purpose estate will be assessed on financial viability, efficiency and effectiveness, ensuring that optimum use of resources can be demonstrated. Replacement and development plans will be realistic with regard to availability of resources and will demonstrate improved efficiency and address any affordability issues.

## 3. Estates Management

### 3.1. Annual Estates Plan

The estates department will develop, implement and maintain an annual estates plan detailing the projects and objectives for the current financial year. The prime purpose of the plan will be to record, track and monitor progress against business plan objectives, key projects and statutory obligations. This will take into account operational demands and ensure the estate is fit for purpose.

### 3.2. Planned Maintenance

A regime of planned maintenance will be developed and implemented to ensure that:

- Statutory testing and servicing is carried out where required (e.g. boiler servicing, fixed electrical tests)
- Routine safety inspections are programmed and executed (asbestos legionella, risk assessments etc)
- Planned preventative maintenance is completed (garage door servicing etc)
- Other planned maintenance such as redecoration will be scheduled as part of the overall plan subject to the availability of funding

The estates managers are responsible for maintaining the records centrally for their respective geographical areas of responsibility.

### 3.3. Reactive Maintenance

The estates department will develop and implement a single electronic facilities management (eFM) system for the reporting of day-to-day building and plant defects and failures. A common approach to the reporting, tracking and costing of reactive repairs will be adopted across the Trust and will be managed centrally with the assistance of the estates support team.

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Wherever possible, common contracts will be put in place for the delivery of reactive (and planned) maintenance. The procurement of any maintenance contracts will be in association with the NWS procurement team and will, as far as reasonably practicable, utilise existing framework agreements to reduce the administrative burden.

### 3.4. Performance Indicators

The estates team will develop and monitor a number of agreed performance indicators, these will include the following:-

- Periodic review of the six facet survey profile against the benchmark to assist with the targeting of investment/business cases and to support strategic estates planning
- Progress with compliance with statute, legislation, NHS and other sector guidance and/or best practice(Statutory Compliance Toolkit/Premises Assurance Model)
- Progress of capital projects including time and cost against the NWS capital programme
- Annual ERIC return, including comparison with peer ambulance Trusts (i.e the sector median approach advocated by the Carter report)
- Development of model ambulance data submissions

To assist the monitoring of performance indicators, a single estates software system will be implemented across all estate to store and collate data on site activity.

### 3.5. Contingency Plans

Business continuity plans (BCP) will be maintained through training and exercise and regular audit and review, to ensure the continuity of all estate requirements and reactive maintenance. Business impact analysis (BIA) processes will be undertaken by the estate managers in conjunction with the emergency preparedness team to ensure that all estate requirements support and integrate with other departmental arrangements and the overarching Trust BCP. The estate business continuity management (BCM) arrangements will be made available to all members of the estates team and other Trust departments.

The assistant director of estates, fleet and FM will be responsible for ensuring contingency arrangements are maintained.

### 3.6. Cleaning Services

The management of premises cleaning services and contract is the responsibility of Head of FM and will be delivered predominantly via external contractors or via SLA in leased premises.

Procurement of cleaning services will be managed in conjunction with the procurement and supplies team. The estates team will provide cleaning schedules and guidance for all station areas in accordance with the National Standards for Healthcare Cleanliness - ambulance sector specific (in progress at March 2022).

### 3.7. Acquisition and Disposal of Property

The estates team will manage the acquisition and disposal of Trust land and buildings in accordance with NHS Health Building Note 00-08 “Strategic Framework for the Efficient Management of Healthcare Estates and Facilities”.

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## 4. Compliance with Statute and Guidance

- 4.1.** Whilst there is no standard national specification for the design of an ambulance station, the guidance in NHS Health Building Note 44 (Accommodation for Ambulance Services) will be observed, along with the Trusts own single standards and design, when considering new developments and alterations to existing premises. NWAS has also developed its own documentation and guidance with regard to design considerations when developing operational premises.
- 4.2.** In addition, all new developments and major alterations would take account of:
- BREEAM Healthcare
  - The Building Regulations
  - Planning legislation
  - Health Technical Memoranda
  - Health Building Notes
  - Regulatory Reform (Fire Safety Order) 2005
- 4.3.** The estates team will assess and monitor the compliance of the Trust estate against all relevant statute and will work towards the implementation of the NHS Premises Assurance Model.

## 5. Capital Improvement

- 5.1.** The annual estate capital programme will be drawn up to take into account the estate strategy in the context of the five year forward view, the changing estate profile, backlog maintenance, the service modernisation agenda and workforce profile.
- 5.2.** Estate developments require a great deal of forward planning, preparation and involvement from many areas to achieve delivery of the estate capital programme within the scheduled financial year. All capital developments will be considered carefully in the context of future development and/or rationalisation of the estate in order to prevent the inappropriate use of capital funds on premises which may have a limited lifespan.

## 6. Environmental Control and Sustainability

- 6.1.** The Environmental/Sustainability Manager will manage the Trust's performance in sustainability including the impact on the environment from Trust premises and service delivery. This would include the management of the environmental impact of all forms of waste disposal and energy usage (including water drainage from vehicle cleaning).
- 6.2.** The Environmental/Sustainability Manager will be responsible for developing the Trust Waste Management Policy. This will require the assistance of many trust departments that will be assigned the responsibility for various different waste streams including;
- Clinical safety team - clinical waste (including sharps) procedures
  - Vehicle maintenance dept. - waste arising from maintenance procedures (oil/batteries/brake pads etc.)
  - IT – redundant / scrap IT equipment
  - Corporate / legal / finance – disposal of confidential paper waste
  - Operations – linen / redundant (none-electrical) medical equipment
- 6.3.** The estates department will be responsible for the gathering, monitoring and evaluation of energy consumption figures for all sites and using the data to identify areas for energy saving initiatives.

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## 7. Health, Safety, Security and Risk

### 7.1. Accessibility

The Trust will ensure that all buildings comply with relevant legislation with regard to accessibility. All building alterations and new buildings have the potential to impact on both staff and visitors with regards to equality. All capital developments will therefore consider the impact of alterations on all users/visitors and, where appropriate, make reasonable adjustments to improve accessibility to all.

### 7.2. Control of Estates Contractors

The control of estates contractors will be the responsibility of the estates managers on a contract-by-contract basis. All contractors will be managed in accordance with the Trust Control of Contractors Policy. Only contractors on estates-related activity will be managed by the estates team. All other contractors will be managed by the relevant department placing the order.

### 7.3. Asbestos

The Trust occupies many premises where asbestos materials are present. The management of these materials will be dealt with under the Trust Asbestos Policy.

### 7.4. Legionella

A Trust Legionella Policy has been developed and will be implemented to ensure that the requirements of HSE Approved Code of Practice L8 and NHS HTM 04-01 (where appropriate) are met in full. All Trust premises will have a legionella risk assessment carried out which will be updated at intervals specified in the legionella management plan.

### 7.5. Health and Safety Quarterly Checks

The estates department will provide support to service delivery and health, safety and security team colleagues during the workplace Inspection process. The process is defined in the NWAS Health, Safety and Security Toolkit. Defects identified during inspections should be reported in the usual way via the relevant route. Where more serious defects are identified the appropriate estates manager can become involved via the escalation process.

### 7.6. Fire Safety

The estates team will support the health, safety and security practitioners in developing and implementing a prioritised plan to address building-related risks arising from fire risk assessments. In addition, the estates team will be responsible for maintenance of fire-fighting equipment, fire detection and alarm systems, fire suppression systems and for ensuring that suitable records of such maintenance are kept.

### 7.7. Security

The estates team will support the health, safety and security practitioners in developing and implementing plans for appropriate physical security measures. This may be during planned (capital) alteration works or ad-hoc in response to persistent security incidents. The estates team will also ensure that all electronic security systems (intruder alarms, CCTV in use) are serviceable and covered by appropriate maintenance and monitoring contracts at all times, for ensuring that suitable records of such maintenance are kept.

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## 7.8. Insurance

The Trust's property portfolio is covered by NHS Resolution's Property Expenses Scheme and to some extent the Liability to Third Parties Scheme. Insurance is managed through the corporate affairs directorate.

## 7.9. Building Fabric and Plant Failure

Building fabric and plant failures, where there has been a risk of, or actual, staff injury it will be reported in accordance with incident reporting guidelines indicated in the Trust's Incident Reporting & Investigation Policy. The Trust will monitor and act on notifications from the health, safety and security department and relevant manufacturers.

NWAS NHS Trust is committed to complying with its statutory responsibilities to ensure, so far as reasonably practicable, the health, safety and welfare of any patient in our care, all its employees, service users and any other person who could be affected by the activities of the Trust. The Trust's Incident Reporting & Investigation Policy aims to make sure that NWAS NHS Trust can meet its statutory obligations to report incidents to the appropriate external agency when required and to work with those agencies throughout the investigation process.

## 7.10. Infection Prevention Control

The North West Ambulance Service NHS Trust is committed to promoting the highest standards of infection prevention control to ensure that appropriate measures are in place within the Trust to reduce the risk of acquired infections and therefore increase the safety of our patients, staff and the public. Estates will observe the Trust Infection Prevention Control Policy.

## 7.11. Risk Management

The Trust has developed a Risk Management Policy, and as part of the ongoing development of this, the Trust estates department, in partnership with the quality team, develop risk management controls for the estates including risk registers, risk assessments, control measures and contingency plans. The Trust will monitor this process taking into account best practice.

The Trust accepts that due to the nature of its activities there will be risks present in those activities. Through risk assessment the Trust will determine acceptable risk levels and ensure that through monitoring and review processes, further measures are implemented to reduce risk as a result of changes in practices, standards, legislation and new equipment emerging.

## 8. Equality Impact Assessment

The Equality Impact Assessment is shown at Appendix 1.

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## Appendix 1: Equality Impact Assessment

### Name of Policy, Service or Function

Estate Policy - NWAS

### Equality Impact Assessment carried out by

Andrea Long/David McNichol

### Date of Equality Impact Assessment

06.04.22

### Step 1: Description and Aims of Policy, Service or Function

#### Overall aims

To define the responsibilities and accountability for the delivery of a quality Trust Estate function.

#### Key elements of policy, service, process

The policy is written for the Estates department and Trust to be systematic in its approach in the control of the quality and control of the Estate.

#### Who does the policy, service or function affect?

All Trust staff

Visitors

Contractors

#### How do you intend to implement the policy or service change (if applicable)

The policy requires approval by the EMT and Trust Board. It will be made available by intranet for all internal staff. The policy will be reviewed and amended to take into account any future service developments.

### Step 2: Data Gathering

#### Summary of data available and considered

The policy requires approval by the EMT and Trust Board. It will be made available by intranet for all internal staff. The policy will be reviewed and amended to take into account any future service developments.

### Outcomes of data analysis

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<b>Equality Group</b>	<b>Evidence of Impact</b>
Gender	Inappropriate gender mix facilities reflection of organisation of mid 20 <sup>th</sup> century.
Race/Ethnicity	None
Disability	The policy is a written document and there may be an impact on those with visual impairments or those with conditions such as dyslexia. Consideration will be given to DDA when carrying out all capital work.
Sexual Orientation	None
Religion or belief	None
Age	None
General (Human Rights)	None

**Step 3: Consultation** *(Please note you may want to return to this section following Steps 4 & 5)*

**Summary of consultation methods**

Estates Managers

Health, Safety and Security managers

**Outcomes of consultation**

<b>Equality Group</b>	<b>Evidence of Impact</b>
Gender	Part of capital programme gender mix will be addressed to reflect mix of organisation.
Race/Ethnicity	None
Disability	The policy is a written document and there may be an impact on those with visual impairments or those with conditions such as dyslexia.  Running capital programme to improve facilities ref DDA
Sexual Orientation	None
Religion or belief	None
Age	None
General (Human Rights)	None

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## Step 4 & 5: Impact Grid

Relevant Equality Area	Areas of impact identified	Is the impact positive or negative?	Key issues for action [Will form basis of action plan]
Gender	Lack of appropriate level of female sanitary accommodation at some sites	Negative	Provide suitable levels of sanitary accommodation for female staff at all Trust Premises. Improvements being made as part of capital programme.
Race/Ethnicity	No impact identified		
Disability	The policy is a written document and there may be an impact on those with visual impairments or those with conditions such as dyslexia.	Negative	Provide alternative formats where requested.
	Access to some premises by disabled visitors is directly affected by design	Negative	EIAs of designs. Involvement of disability groups. Building visited by disabled people reviewed and work complete. Staff employment will be assessed on need by need basis.
Sexual Orientation	No impact identified		
Religion or belief	No impact identified		
Age	No impact identified		
General (Human Rights)	No impact identified		

## Step 6: Action Plan

### Name of Policy or Service: Estates Policy

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<b>Issue identified and equalities group or communities affected</b>	<b>Action to be take</b>	<b>By When</b>	<b>Who By</b>	<b>Expected outcome</b>	<b>Progress</b>
Difficulties in reading the policy by visually impaired users	Produce a large print version in accordance with the principles of RNIB “clear print” guidelines.	Once policy is approved.	AD – E&F	Large print version produced.	Available on request.
Difficulties in reading the policy by users with conditions such as dyslexia.	Initially the usual enhancements by the user will be employed. As dyslexia takes many forms it is not possible to be overly prescriptive however requests for alternative versions of the policy will be accommodation on request.	On request.	AD - E&F	Alternative version produced.	Assistance available upon request.
Disability – Estate design will have a high impact on patients from disabled groups in terms of their access and dignity of use	Equality Impact assessment of Estate design to be introduced  Involvement of disability groups in design of Estate	As required	Estate Managers	All premises to be accessible for all visitors. Staff adjustments made on need by need basis.	Works being carried out as part of capital programme improvements.

### **Summary of decisions and recommendations**

To be actioned as above

### **Step 7: Monitoring arrangements**

The policy will be reviewed and amended to take into account any future service developments.

### **Step 8: Date of next Equality Impact Assessment**

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On acceptance of the policy and any subsequent changes following policy review.

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