Newcastle University
Strategic Framework for the Estate
2023-2030

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Scope, Strategic Enablers, and Stakeholders

Scope of the Strategic Framework for the Estate

The Strategic Framework for the Estate is designed to guide proposals and practices through principles and process for Newcastle University's UK based locations, and will help support decisions at our International Campuses. It seeks to inform Newcastle University's physical footprint between 2023 and 2030 by creating a Campus for the Future that responds and embodies the vision, values, guiding principles, and strategies of Newcastle University across its Estate and Facilities.

This Strategic Framework for the Estate was written by members of the Estates Portfolio Board in consultation with the Faculties, Schools, Institutes, Professional Services, and Students so that key stakeholders have been part of its creation. Fundamentally, the Strategic Framework is a people centred document acknowledging that Newcastle University principally operates as an in-person on-campus environment. For reasons of sustainability and flexibility there are clear links with the Technology Portfolio Board. The Technology Portfolio Board (TPB) operates to a similar Strategic Framework that seeks to ensure that investment in technology best supports the university's strategic objectives. Examples of cross cutting work programs include facilitating hybrid and online environments on campus. While the Portfolio Boards evaluate and manage the project portfolio they operate within strategic direction and priorities set by the Infrastructure Strategy Group (ISG) and University Executive Board.

Ideas, proposals, designs, and suggestions for how we develop a Campus for the Future will be supported by this framework. It does not lay the blueprint for all activity until 2030, rather it works as a scaffold to support the proactive and responsive physical infrastructure activity which comes from those that know it best… its colleagues and students.

Newcastle University Strategic Enablers for the Estate

In January 2019 Newcastle University agreed the strategic enablers that would 'provide a framework for integrated thinking that joins-up the planning and delivery of services. This will help us to make best use of resources, improve decisions and to demonstrate accountability, transparency and stewardship' (p. 2). The following are the strategic enablers for infrastructure which will inform the physical elements of the estate and therefore this Strategic Framework.

Areas for Infrastructure
➢ We will work together across our services to understand academic objectives and to produce timely, expert support for education and research and innovation.
➢ We will support and inform the development of world-leading facilities and services and add value to core strategies.
➢ We will develop our Information Technology and built environment together to facilitate multi-disciplinary engagement between students, colleagues, and external partners through an integrated and seamless digital experience.
➢ We will provide a range and diversity of residential accommodation to meet changing needs and expectations.
➢ We will design and develop our physical and virtual estate and will support the University's commitment to sustainability through the responsible use of energy and resources.

The University's capital investment plan supports delivery of the Vision. The continued development of the academic and residential estate, investment in sports facilities, sustainable development projects and the refresh and enhancement of our digital services all serve to create an outstanding future-facing teaching, research and living environment for our students and staff. We are working to ensure that space on our campuses is used as effectively as possible and developed in line with the evolving needs of our communities. We are also working to ensure there is value for money in everything we do. (p.6)

Available through SharePoint: Strategic Enablers

A Campus for the Future

Being clear and connected to the University's Vision and Strategy (shown in the appendix, p.29) through the work of the Estates Portfolio Board, acknowledging the performance of the current estate, and linking to the principles and strategic enablers for the estate the following is Newcastle University's strategy and operation towards a Campus for the Future by 2030.

The aim of this Strategic Framework for the Estate is to create a connected campus for the future to underpin high-quality education, world-class research and innovation and Industry and societal engagement. With people and their experience at its core, the framework adopts a 'one University estate' approach to the development of the University estate and infrastructure to enhance the experience for all whilst maximising the effectiveness of our physical and digital estate and minimising our environmental impact.

Culturally connected

Physically connected

Digitally connected
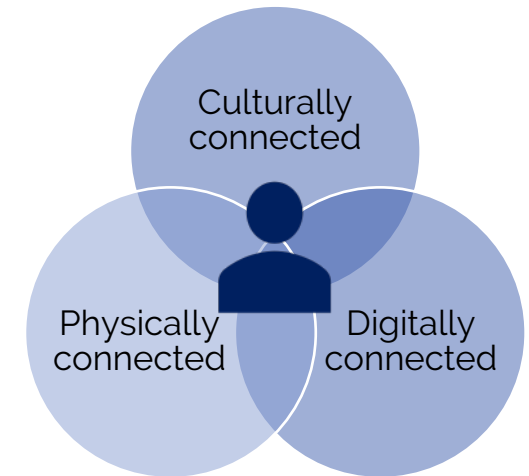
This strategic framework has guidance for those directly involved in the physically connected estate (the DISCovery Themes) and for those colleagues who wish to make proposals for projects on the estate (The Qualitative and Quantitative Measurements for Proposed Projects). Both sets of guidance are connected by the same ambition: for a culturally, physically, and digitally connected campus that continues to enhance student and colleague experience, provide an inspiring studying and working environment for our colleagues, a safe and secure location, and strengthening our standing as a global university.

The Estates Portfolio Board (EPB) is responsible for this Strategic Framework. Composed of stakeholders from across the University, EPB exists to help colleagues identify and realise estates-intensive projects.

They report into the Infrastructure Strategy Group (ISG) and are primarily informed by the Faculty Infrastructure Strategy Groups (FISG).

EPB operates with the following strategic values:

EPB also liaises closely with the Technology Portfolio Board (TPB) to ensure coherent handling of projects which combine physical and digital workstreams, and it consults with the Cultural Campus Advisory Group to identify opportunities within planned and existing projects for cultural enrichment to enhance the colleague and student experience and distinctiveness of the campus which reflects our values as a global and inclusive University

The Estates Portfolio Board receives and reviews proposals for 1) strategic estates developments and 2) for replace and maintain projects that impact stakeholders across the Campus. For projects that are singular to an area with no shared purpose these would remain within a Faculty or School (for example, a room refresh) and for projects that are greater in cost than 250k or have significant infrastructural implications for the University (for example, a new build) these would move into the ISG with guidance from EPB.
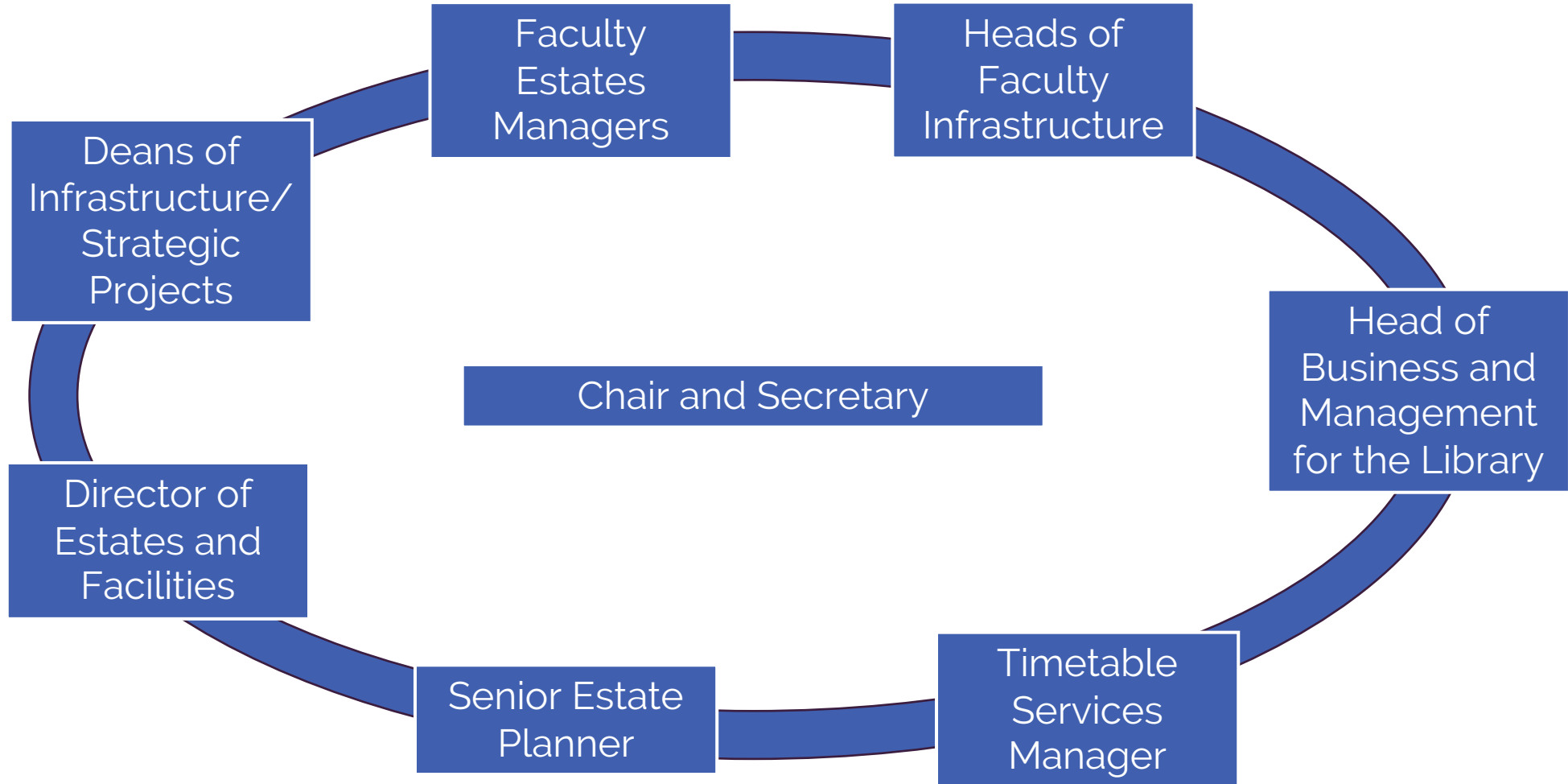
Estate Stakeholder Organogram
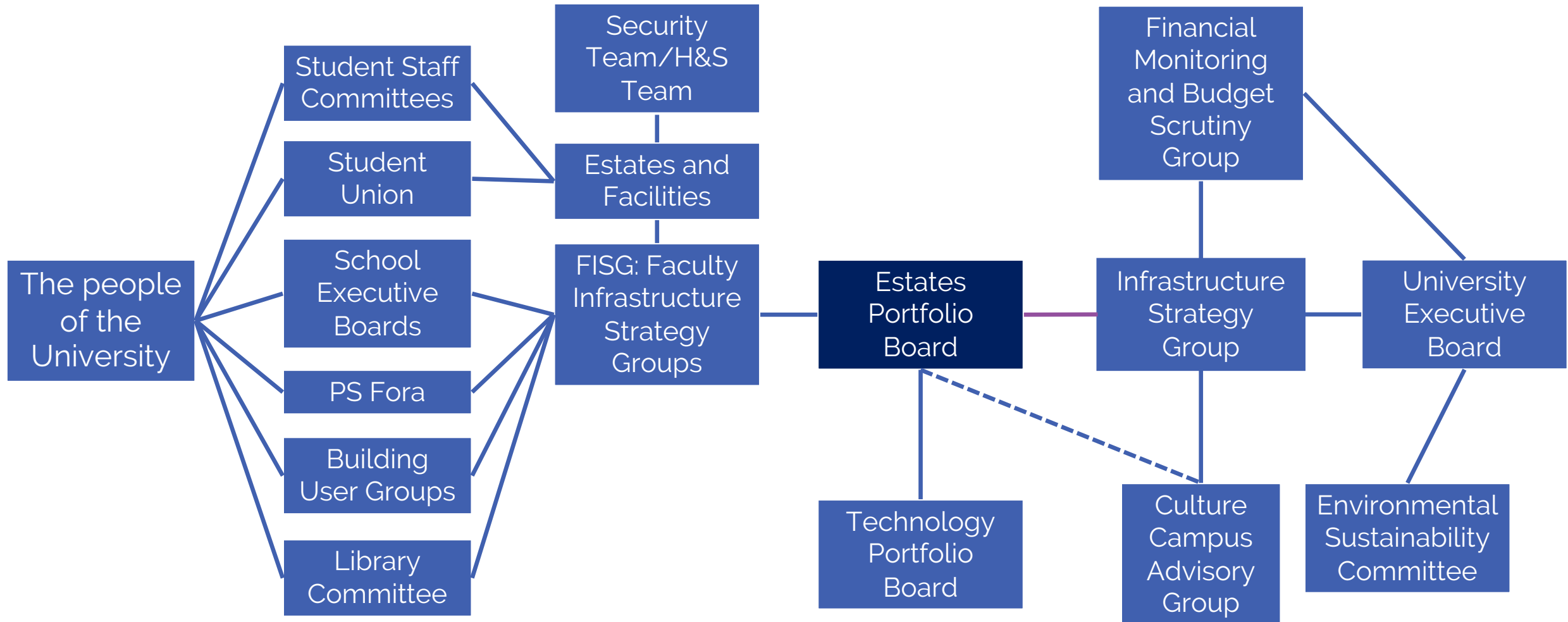
The Dean of Infrastructure for HaSS is the Chair of EPB;

The Dean of Strategic Projects for SAgE is the Chair of TPB;
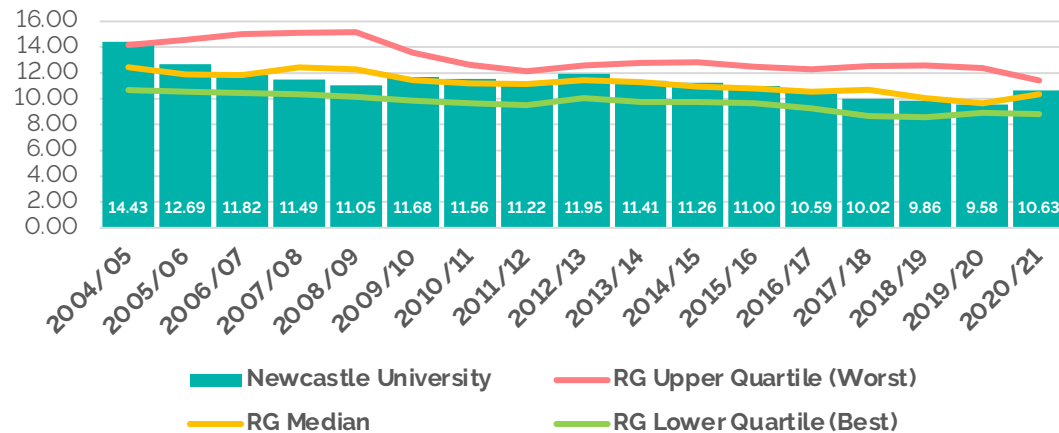
All three Deans sit on ISG.

Faculty Estates Managers

Heads of Faculty Infrastructure

Deans of Infrastructure/ Strategic Projects

Chair and Secretary

Head of Business and Management for the Library

Director of Estates and Facilities

Senior Estate Planner

Timetable Services Manager

Performance of the Current Estate and SWOT analysis

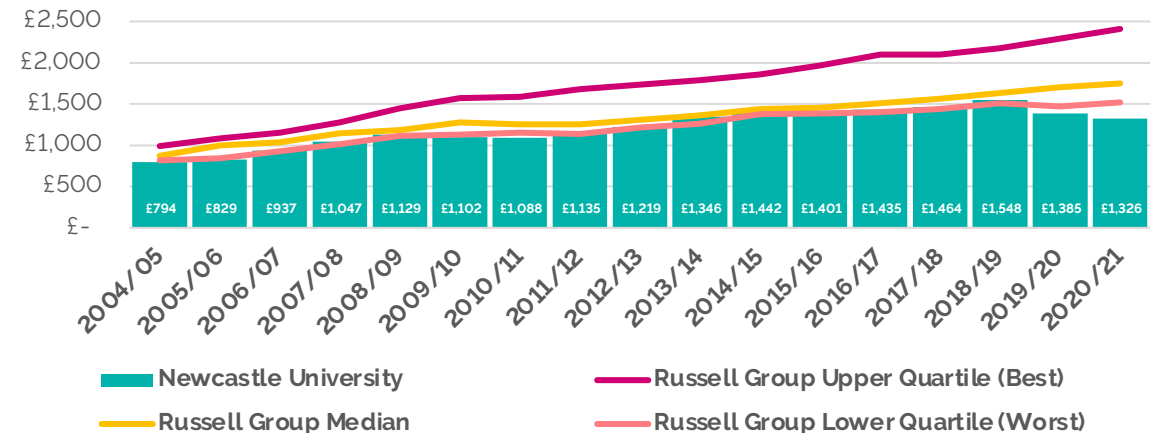# Performance of the Current Estate: HESA driven data

The majority of the current estate has a building condition that is within the Russell group upper quartile (see page 30 in appendix) and has a functional suitability that is also within the Russell group upper quartile (see page 31 in appendix). However, as can be see from the graphs below, our Net Internal Area (NIA) for non-residential space is above the Russell Group median which means that we need to use our estate more effectively and become more cost efficient (graph on left) and our income per m^2 is significantly below the Russell Group lower quartile which means our Estate is not bringing in sufficient monies to support itself (graph on right).

Put simply, our estate is within the Russell Group upper quartile regarding condition and suitability but it is not being used efficiently nor cost effectively.

Russell Group Non-Residential NIA m^2 per Student & Staff FTE

Newcastle University values: 14.43, 12.69, 11.82, 11.49, 11.05, 11.68, 11.56, 11.22, 11.95, 11.41, 11.26, 11.00, 10.59, 10.02, 9.86, 9.58, 10.63

Legend: Newcastle University, RG Upper Quartile (Worst), RG Median, RG Lower Quartile (Best)

Russell Group Non-Residential Income per m^2 Non-Residential GIA

Newcastle University values: £794, £829, £937, £1,047, £1,129, £1,102, £1,088, £1,135, £1,219, £1,346, £1,442, £1,401, £1,435, £1,464, £1,548, £1,385, £1,326

Legend: Newcastle University, Russell Group Upper Quartile (Best), Russell Group Median, Russell Group Lower Quartile (Worst)

All measurements are made and recognized from our HESA return.

Performance of the Current Estate: SWOT analysis

Newcastle University

Strengths

1. HESA evidence shows we have a largely well-maintained estate in terms of functional suitability and building condition.
2. The location of our campus to the city is an advantage in terms of access and location to City facilities.
3. We have excellent working relationships with Local Council, Police, Health Trusts, SMEs, VCSE, & cultural partners.
4. We are building relationships with other NE Universities.
5. We have multiple styles of teaching facilities.
6. Our climate action plan is supported by capital investment.

Actions following Strengths

1. Continue to invest in estate maintenance and remain in the top quartile of the Russell Group
2. Promote the campus as a City Centre destination and encourage on campus engagement from a civic perspective
3. Continue to harness existing regional relationships and seek to increase/develop new opportunities with VCMEs and SMEs.
4. Seek opportunities for greater shared learning across the NE5
5. Explore the balance of teaching facilities across the campus embodying the one university approach to respond to NU Shape.
6. Continue to invest sustainably in our estate to work towards Net Zero by 2030.

Weaknesses

1. Those areas of the Estate which are in Building Condition C or D impact upon our overall performance.
2. Our campus is compact but split into Area 1: Central, Area 2: Accommodation, Area 3: Medical School, and Area 4: Helix which creates perceptions of dispersal and inaccessibility between areas.
3. Some of our estate is unadaptable either by design or because of its status as a Listed Building.
4. Duplication of facilities is costly and inefficient.
5. Lack of greater collaboration leads to poor utilization.
6. Poor signage and wayfinding for the diverse, cultural, and religious needs of our community.

Actions following Weaknesses

1. Explore the feasibility of invest-or-sell strategies for buildings with condition C or D.
2. Promoting the physical connections between our Areas 1-4 through improved digital and physical wayfinding and branding.
3. Consider the functional suitability of our estate to ensure alignment with NU Shape and cohesion of our operations.
4. Promote rationalisation of the estate through sharing of facilities.
5. Explore opportunities for additional non-residential income through greater utilization of our facilities.
6. Embed a wayfinding group within the Estates Portfolio Board to consider global, iconographic, and digital signage for the estate.

Performance of the Current Estate: SWOT analysis

Opportunities

1. As the size and shape of units and areas of activity are reconsidered (grow, rebalance, shrink) the footprint of those areas can also be reconsidered.
2. When spaces become vacant, they can be considered for repurpose beyond original use (e.g. other academic purpose, decant, or partnership space).
3. Whilst remaining an in-person campus opportunities for hybrid teaching, working, and meeting can be supported.
4. Health Innovation Neighbourhood (HiN) is a space where our research, education, engagement & place strategies can come together.
5. Income streams can be diversified to increase utilization across the academic year.
6. Capturing and communicating our global community, impact, and identity throughout the infrastructure of the estate.

Actions following Opportunities

1. Use of data to inform NU Shape decision making as part of the business case determination process.
2. Consideration of underutilized and vacant space is honored through a transparent and trusted space management process.
3. Promotion and investment in appropriate hybrid facilities to facilitate teaching and meetings in accessible common user areas.
4. Consider further opportunities to connect this joint venture (between GKRL and NCL Uni) with all interested Schools, Faculties, and Institutes.
5. Market our available spaces to the civic and regional communities including SMEs, VCMEs, schools and colleges to increase non-residential income.
6. Work closely with the International Office through the Estates Portfolio Board to inform decision making across all future infrastructure planning and projects.

Threats

1. Increasing energy costs due to global pressures.
2. Inflation challenges the feasibility of investment in new buildings.
3. Ageing buildings require continuous and increasing levels of investment.
4. With ageing buildings, the perception of disrepair can attract homeless, trespass, and unacceptable behaviours.
5. Income in relation to student experience, engagement, and retention on campus.
6. Colleagues and students moving off campus when not engaged in timetabled or resource engaged activities.
7. Lack of student accommodation is a threat to our student experience and income.

Actions following Threats

1. Implement energy saving measures including reducing widespread out of hours access, improving temperature control, and investing in building performance.
2. Ensure robustness of business case to support investment in new buildings.
3. Increase investment is our estate where supported by financial sustainability.
4. Increase stakeholder liaison with Local Authority Community teams and interaction with key Crime Prevention and Neighbourhood Police personnel.
5. Ensure that global and education strategies are aligned to inform estate planning.
6. Create exciting and innovative encounter spaces to create a sticky campus.
7. Consider options for student accommodation both in-house and/or with partners.

A Campus for the Future: DISCovery Themes Statement

The Campus for the Future will be supported by these *DISC*overy themes

Distinctive	Inclusive	Sustainable	Collaborative
we strive for excellence in our education, research, engagement and place, and global activities making the experience for our students, colleagues, and partners unique and impactful. **we will use our campus** to physically & digitally and visibly & audibly show our global, national, and regional impact and engagement activities.	**we nurture** a thriving community that is diverse, inclusive, and interdependent. **we will engage with our internal experts** across disciplines to support a 'living lab' approach to our campus. **we will support spaces of belonging** across our campus so that it becomes a sticky campus for all its stakeholders.	**we care** about our people, our planet, and the long-term sustainability of the University. **we will tailor** our estate shape and size to fulfil our business needs and reduce our environmental impact	**we are one University.** **we will work together** sharing space, offices, meeting rooms, labs, equipment, resources, and facilities to encourage collegial practice and promote cross-disciplinarity across all undergraduates, postgraduates, research associates, academics, technicians, and professional service staff.

A Campus for the Future: DISCovery Themes in Action

We will improve, redesign, refurbish our campus towards 2030 using the DISCovery themes
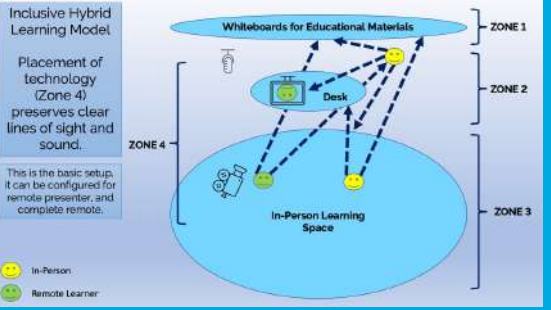
Distinctive	Inclusive	Sustainable	Collaborative
We will do this by	**We will do this by**	**We will do this by**	**We will do this by**
Following a Newcastle University brand architecture in the redesign and design of our spaces whilst respecting the architectural elements of our estate.	**Co-locating** undergraduates, postgraduates, research associates, technologists, practitioners, and academics based upon their area of investigation thereby avoiding single use areas.	**Making** all spaces comfortable and energy efficient.	**Allocating** space that is appropriate to the activity.
Signing for a global audience routes through and towards the campus, buildings, rooms, and encounter spaces.		**Making** our buildings and spaces available based upon the need and usage of the many rather than the few; opening spaces and buildings outside of working hours only when there is specific need.	**Mixing** diverse but subject connected teams to avoid siloes.
Making our estate face outwards into the city, region, nation, and world with connections and representations of activity on campus and off campus.	**Making** our spaces accessible to all and sharing spaces with external partners locally and globally.		**Recognising** that our equipment and facilities (education and research) belong and are supported by the University.
	Using hybrid technologies to help those are not able to be person on-campus feel part of the University experience.	**Being flexible** in our footprint as Education, Research, Engagement and Place, and Global projects grow and shrink.	**Working** with our cultural venues and public spaces to create a culturally rich campus that reflects our values.

A Campus for the Future: DISCovery Themes in Action

We will improve, redesign, refurbish our campus towards 2030 using the DISCovery themes

Distinctive	Inclusive	Sustainable	Collaborative
We will do this by **Adopting** design quality principles to address issues regarding student isolation and mental health and wellbeing by creating spaces that encourage belonging and a sticky campus. **Introducing** a comprehensive residences life and support team/programme to promote a supportive, welcoming, and positive experience for students within our accommodation.	**We will do this by** **Optimising** provision of innovative study and encounter spaces, information resources and other services required by our students and colleagues. **Investing** in recreational and performance sports facilities for our students and colleagues so that our campus brings people together between their learning environments. **Storytelling** our activities through physical spaces so that we think, feel, and act as a global community.	**We will do this by** **Developing** a holistic understanding of facilities and equipment across the institute/estate to avoid duplication. **Using** sustainable and biodiverse materials with a fabric-first approach to building design to maximise energy efficiency. **Embedding** a responsible approach to procurement and recycle, repurpose, and reuse before purchase.	**We will do this by** **Encouraging** and supporting interdisciplinarity and intercultural learning through the creation of encounter spaces (both physical and virtual) for student/colleague collaborations. **Monitoring** room and equipment usage to make data informed decisions about how we can work together and support a physically present campus. **Connecting** with external colleagues such as the NE5, NE1, City Council, and Community Groups.

Examples of how the the DISCovery themes are currently working in practice.

Distinctive	**Inclusive**	**Sustainable**	**Collaborative**

Distinctive

The iconic Arches.

Mindsphere Lab showing research in action.

Wall vinyls representing civic impact and identity.

Inclusive

Quiet room for wellbeing, nursing, and pastoral use.

Inclusive Hybrid Learning Model

Placement of technology (Zone 4) preserves clear lines of sight and sound.

This is the basic setup. It can be configured for remote presenter, and complete remote.

Whiteboards for Educational Materials — ZONE 1
Desk — ZONE 2
ZONE 4
In-Person Learning Space — ZONE 3

In-Person
Remote Learner

IHLS (Inclusive Hybrid Learning Spaces) for in-person and digital education.

Sustainable

24 HOURS Computer Cluster 1.57

Safe and secure spaces for Outside of Working Hours need.

Thermal modelling informing the refurbishment of our Architecture and KGVI buildings.

Collaborative

Shared office space between two faculties for Postgraduate administration.

6.12
HASS & SAGE GRADUATE SCHOOL OFFICE

Co-location of research activity across the campus between the three Faculties.

One Planet

Examples of how the the DISCovery themes could work in practice.

Distinctive	Inclusive	Sustainable	Collaborative
Each redesign and refurbish, as well as build, will make reference to the Newcastle University design brief so that there is consistency in the aesthetic experience of the buildings. Signs will be clear and use infographics before text. Buildings, corridors, and internal & external walls will showcase our work through digital and physical displays as well as audio and immersive encounters.	Each area will consider its space holistically to bring all those involved into that space which may mean redesign and reconsideration of spaces within the area before requests for expansion. Each area will have accessible routes throughout whilst working with issues pertaining to Listed Buildings. Inclusive Hybrid Learning Spaces and Inclusive Hybrid Meetings Spaces will be supported as required around the campus for use by all those who have designed or need this in their activity.	We will use thermal modelling to prioritise the areas needing energy efficiency work; Rather than grow the estate we will redesign space to support the activity present in that space. Buildings will only be open outside of working hours when there is specific need by users such as during assessment periods or for access to equipment. Growth can only happen in areas where there is a cost benefit or cost neutral. Also, if a building/area is no longer its future use will be considered by EPB.	As with current Russell Group infrastructural thinking, allocation of office space will be based upon usage, occupancy, and bringing colleagues together in co-located spaces. Pastoral and wellbeing/quiet space will also form part of the make-up of office spaces to ensure the correct types of spaces can be used for the differing needs of colleagues. All equipment belongs to the University and is in principle available for shared use by all, subject to appropriate training and supervision.

How to propose a project for the Campus

Estates Portfolio Board Project Proposal Form

How to propose a project for the Campus

Project proposals can come from either individuals or groups of colleagues and students. The Estates Portfolio Board consider proposals for estate related projects that are cross-cutting, in other words they have benefit for more than just a single area of activity on the campus. Please note that this does not replace the SPR process for estate requests coming from a single area/unit/school.

Submission of project proposals must flow through School/Unit approval and Faculty Infrastructure Strategy Group approval before reaching Estates Portfolio Board. There is no shortcut to the process to uphold equal and appropriate voices in the decision making process. Projects which are considered by Estates Portfolio Board are scored using both qualitative and quantitative measures but a decision is ultimately reached by discussion by all members of Estates Portfolio Board (who represent each Faculty, Estates and Facilities, the Library and Timetabling) taking these measures into account rather than simply accepting the scoring.

The Estates Portfolio Board Project Proposal Form can be found using the hyperlink, it asks for details and connections to the DISCovery themes. It also asks the proposal to consider risks and assumptions, costs and timescale, and return on investment/value for money. If a project gains approval depending on costs it will most likely move to Financial Monitoring and Budget Scrutiny Group for consideration.

A decision will be reached by Estates Portfolio Board which will be 1) approved as a strategic project worthy of support and a request for costing and a business case to be developed (this should happen within six months of approval from EPB approval otherwise the project will need to be resubmitted for re-approval); 2) approved in principle as a strategic project worthy of consideration but held in a pipeline of proposed activities for when costs, activity, opportunity, or collaboration can support the project (once the project is ready to move forwards the proposal will be notified in case they wish to make any changes); 3) not approved by Estates Portfolio Board and the project is rejected because it does not adequately meet the criteria of Newcastle University's Strategic Framework for the Estate 2023-2030. Feedback will be given in all circumstances and in each consideration a request for more detail through resubmission is at the discretion of the Estates Portfolio Board. Proposals are considered in each Estates Portfolio Board meeting which occur at least three times per academic year and the project proposer will be notified of the outcome from the board within 5 working days.

How to propose a project for the Campus

The following qualitative and quantitative measurements guide those involved in proposing, supporting, and ultimately approving, deferring, or rejecting a project regarding the estate. They are balanced in both qualitative and quantitative measures, and they are directly drawn from the narrative threads found in the University's four core strategies, the strategic enablers for the estate, and the DISCovery themes for The Campus for the Future. Think of the measurements as desirable destination points in a tapestry that weaves together the strategy, organisation, activity, and guidance from the above sources.

In cases where the outcome of a project (such as AM1, AM2, or FM6) would only be known after the event then this measurement will be considered based upon similar evidence-based interventions known across the sector or on campus rather than subjective estimates of likely future values. EPB will score a project based upon 0 for no support, 1 for low support, 2 for medium support, 3 for high support, and 5 for priority support; there is no '4' to create a clear numerical difference between high and priority support.

It is not expected that any project proposal would have to speak to all measurements for a project to gain approval. Rather evidence should be provided in the proposal for how the project can be measured by outcomes that begin with the most impactful, move into outcomes that may have secondary benefit, and respond to outcomes that have been considered or could be developed. Finally, it is worth emphasising that the measurements do not operate in isolation, and it could be expected that a project, for example, would cut across Education for Life and Research for Discovery and Impact strategies, be proactive, have a cultural implications, be inclusive in its design.

	Measurement	Qualitative Evidence	Quantitative Evidence
AM1	Education for Life	A visibly vibrant community of students on campus who are using equipment, study spaces, communal areas to support their Education for Life. Accessible and publicly visible teaching activity on campus.	Excellent scores in student satisfaction surveys across all disciplines. High usage for both formal and social spaces. High application and conversion rates. High progression rates.
AM2	Research for Discovery and Impact	A visibly vibrant community of colleagues on campus who are contributing to and using the estate in connection with their respective and collective endeavour. Accessible representation of research activity inside and outside buildings.	High scores for research environment statements in REF. High proportion of research outputs and impact cases rated world-leading or internationally excellent. Excellent results in our staff engagement survey. High quality applications for roles. Retention of colleagues through investment in research specific estate areas as identified through Conversations and Priorities.
AM3	Engagement and Place	The campus visibly offers spaces to engender and encourage (incubate) business, industry, community, heritage relationships and shows connections with local schools and colleges.	Increased levels of activity/funding through industry, education, heritage, cultural policy makers and collaborative place-based relationships.

AM: Academic Measurement; FM: Financial Measurement; EM: Environmental Measurement

	Measurement	Qualitative Evidence	Quantitative Evidence
AM4	Global	A visible representation of our global community across the campus in building design, engagement, and presence. Examples of recognition of NU as an exemplar or leader in campus design.	Enhanced global reputation for Education for Life and Research for Discovery and Impact.
AM5	Culture and Wellbeing	Everyone feels able fully to engage with all aspects of university life. The campus engenders a sense of belonging for everyone, feels like safe and secure, and is a place to stay/meet between timetabled activities during working hours.	Excellent results in our staff engagement surveys and and research culture surveys. Low numbers of incidents being reported through UHSC. Increased participation in encounter spaces, and cultural venues and activities.
FM6	Financial Performance	A consistently clean, healthy, and well-decorated estate with rooms needing minimal maintenance.	Return or cover of investment during a payback period, with opportunity for additional or increased revenue.
EM7	Environmental Sustainability	The project aligns with the University's Environmental Sustainability Policy	The project contributes to sustainability objectives and targets: for example, Net Zero by 2030.

AM: Academic Measurement; FM: Financial Measurement; EM: Environmental Measurement

EPBs Scoring Table to measure a project proposal against measurements.

Newcastle University

Once a project proposal has been submitted through Planon (both current and future), two members of EPB – one who has direct knowledge of the project (but not the proposer) and one not directly connected to the project – will review the project using the following table and provide the EPB with a report (see following page). The scoring of the project will be expressed as a combined percentage of the two scores (each worth 50%). EPB will consider each project based upon the report, the scoring in each section, and the final percentage as a holistic activity.

		No support (0/5)	Low (1/5)	Medium (2/5)	High (3/5)	Priority (5/5)
AM1	Education for Life	In this section a score of 0 means that there is no consideration of this area when there reasonably could be, it would be expected that any project would at least contribute to one of the four core strategies through these potential outputs.	A score of 1 shows low impact/output in relation to the project, this means that the project barely represents or is under-developed in these areas and would benefit from reconsideration. If all scores in this section are 1 then the project is unlikely to gain approval.	A score of 2 shows medium level impact/output in relation to the project, this means that the project has a clear benefit to the output at a cross-faculty level. A spread of scores in this area would be expected to gain approval.	A score of 3 shows clear and supported evidence for impact/output, this means that the project will demonstrate examples of working together, visible leadership, freedom and opportunity to succeed, and response to challenges.	A score of 5 in one of these areas means that the project holds the potential to be world-class in its excellence, creativity, and impact. It would be expected that a score of 5 would only be used in exceptional cases, and it would be unlikely to be used in all areas.
AM2	Research for Discovery and Impact					
AM3	Engagement and Place					
AM4	Global					
AM5	Culture and Wellbeing					
FM6	Financial Performance					
EM7	Environmental Sustainability					

EPB Project Proposal Form

Project proposals will reach EPB using MS Forms

The proposer must show that the project has gone through Unit/School and Faculty level discussions and gained support.

EPB will then consider the information on the following request areas: What is the project in a paragraph; What are the needs/drivers…; How does the project fit with the strategic direction of the School/Faculty/University; How does the proposal speak to the DISCovery themes; What are the boundaries and dependencies of this project; What are the anticipated costs for the project; and what is the return on investment/value for money.

	Measurement	Score	Rationale
AM1	Education for Life		
AM2	Research for Discovery and Impact		
AM3	Engagement and Place		
AM4	Global		
AM5	Culture and Wellbeing		
FM6	Financial Performance		
EM7	Environmental Sustainability		
	Total		

Approved/Pipeline/Resubmit/Rejected
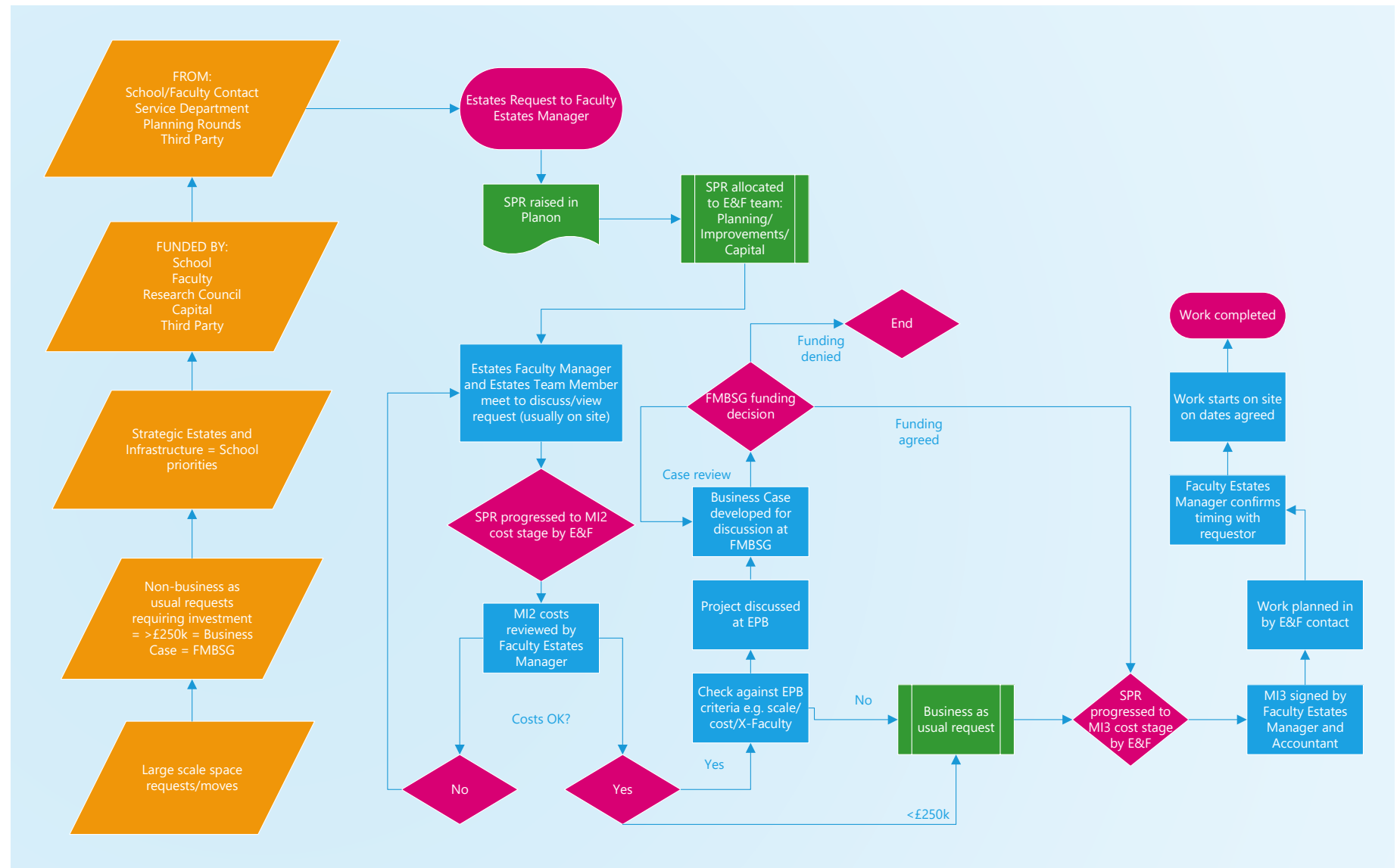Date of Decision:

The projects that flow through this process are those that have benefit across the Estate.

Projects such as room refurb and other local level estate projects which remain at Faculty level will follow their usual processes and not need to come through to EPB.

Similarly, there will be projects in excess of £250k which will be escalated to Infrastructure Strategy Group.

All projects that sit between these brackets will come through the Estate Portfolio Board as a primary point of consideration.

FROM:
School/Faculty Contact
Service Department
Planning Rounds
Third Party

FUNDED BY:
School
Faculty
Research Council
Capital
Third Party

Strategic Estates and Infrastructure = School priorities

Non-business as usual requests requiring investment = >£250k = Business Case = FMBSG

Large scale space requests/moves

Estates Request to Faculty Estates Manager

SPR raised in Planon

SPR allocated to E&F team: Planning/ Improvements/ Capital

Estates Faculty Manager and Estates Team Member meet to discuss/view request (usually on site)

SPR progressed to MI2 cost stage by E&F

MI2 costs reviewed by Faculty Estates Manager

Costs OK?

No

Yes

FMBSG funding decision

Funding denied

End

Funding agreed

Case review

Business Case developed for discussion at FMBSG

Project discussed at EPB

Check against EPB criteria e.g. scale/ cost/X-Faculty

No

Yes

Business as usual request

<£250k

SPR progressed to MI3 cost stage by E&F

MI3 signed by Faculty Estates Manager and Accountant

Work planned in by E&F contact

Faculty Estates Manager confirms timing with requestor

Work starts on site on dates agreed

Work completed

Appendix

Our Vision

HESA uses four grades to measure building condition for spaces across the estate.

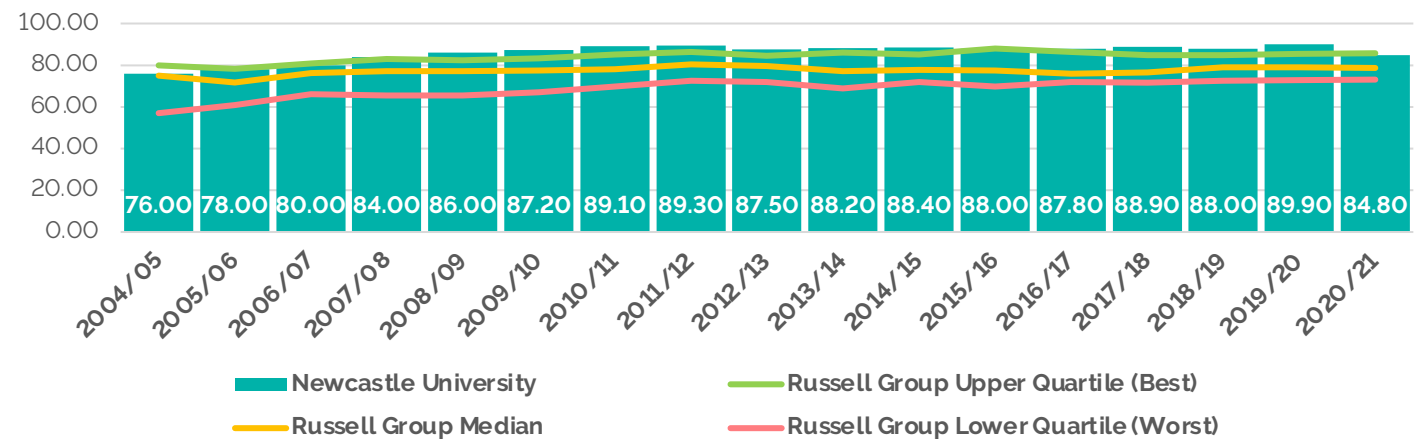|	
Condition A - As new condition	Condition B - Sound, operationally safe, and exhibiting only minor deterioration
Condition C - Operational but major repair or replacement needed in the short to medium-term (generally 3 years	Condition D - Inoperable or serious risk of major failure or breakdown

The graphs shows consistency since 2004 where the majority of the campus has a building condition that is within the Russell group upper quartile.

N.B. the chart for 2020/21 is lower due to current status of HiN.

Russell Group % of Non-Residential Estate with Building Condition A & B

Chart values (Newcastle University): 76.00, 78.00, 80.00, 84.00, 86.00, 87.20, 89.10, 89.30, 87.50, 88.20, 88.40, 88.00, 87.80, 88.90, 88.00, 89.90, 84.80

Years: 2004/05, 2005/06, 2006/07, 2007/08, 2008/09, 2009/10, 2010/11, 2011/12, 2012/13, 2013/14, 2014/15, 2015/16, 2016/17, 2017/18, 2018/19, 2019/20, 2020/21

Legend: Newcastle University; Russell Group Upper Quartile (Best); Russell Group Median; Russell Group Lower Quartile (Worst)

HESA uses four grades to measure the functional suitability of the space to support its existing function.

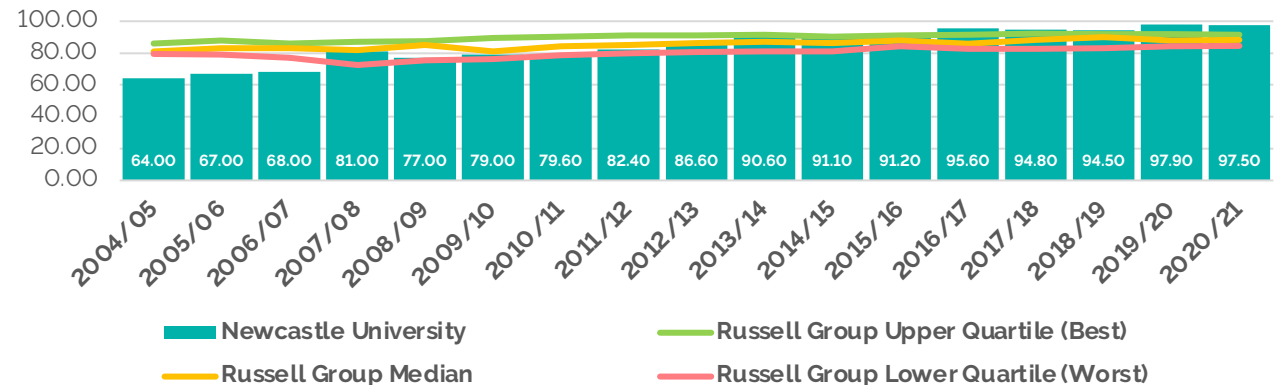| Grade 1 Excellent - the room(s)/building(s) fully support current functions. There are no negative impacts upon the functions taking place in the space.	Grade 2 Good - the room(s)/building(s) provides a good environment for the current function in all or most respects. There may be shortfalls in certain areas, but these have only a minor effect upon current functions.
Grade 3 Fair - the room(s)/building(s) provides a reasonable environment for current functions in many respects, but has a number of shortfalls. These shortfalls may be causing mismatches between space and function that is having a more significant effect upon current functions than Grade 2 rooms.	Grade 4 Poor - the room(s)/building(s) fail to support current functions and/or are unsuitable for current use. The operational problems associated with such space are major, and are constraining current functions in the space. Space in this grade may require alternative solutions, rather than straightforward improvements in particular features of the space

The graphs shows improvement to the Estate since 2004 where the majority of the campus has a functional suitability that is above the Russell group upper quartile.

Russell Group % of Non-Residential Estate with Functional Suitability Grade 1 & 2

Chart values (Newcastle University): 2004/05: 64.00, 2005/06: 67.00, 2006/07: 68.00, 2007/08: 81.00, 2008/09: 77.00, 2009/10: 79.00, 2010/11: 79.60, 2011/12: 82.40, 2012/13: 86.60, 2013/14: 90.60, 2014/15: 91.10, 2015/16: 91.20, 2016/17: 95.60, 2017/18: 94.80, 2018/19: 94.50, 2019/20: 97.90, 2020/21: 97.50

Legend: Newcastle University, Russell Group Upper Quartile (Best), Russell Group Median, Russell Group Lower Quartile (Worst)

- **People, Engagement and Culture Group** Consultation 28th June 2023
- Approved by **ISG** 26th July 2023
- **HASS Faculty** Consultation 6th Sept 2023
- **FMS Faculty** Consultation 21st Sept 2023
- **SAgE Faculty** Consultation 17th Oct 2023
- **International Office** Consultation 13th Oct 2023
- **Security Consultation** 20th Oct 2023
- Approved by **UEB** 7th Nov 2023

Newcastle University Strategic Framework for the Estate 2023-2030

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