





TRUST BOARD / SLT COVER SHEET

		
Meeting and Date of meeting	<i>Trust Board Meeting 29th January 2026</i>	
Title of paper	<i>Estates five-year strategy (2025/30)</i>	
Accountable Director	Name	<i>Catherine Teggart</i>
	Position	<i>Director of Finance, Procurement & Estates</i>
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This paper sits within the Trust Board role of:	Strategy	
This paper is presented for:	Approval <i>(Notes on completion at end of document)</i>	
Links to Trust Strategic Priorities 	<input checked="" type="checkbox"/>	Collaborative Working
	<input type="checkbox"/>	Learning Organisation
	<input checked="" type="checkbox"/>	Safety, Quality & Experience
	<input type="checkbox"/>	Community First
	<input type="checkbox"/>	Whole-Life Approach

1. Reason for Presentation of Paper / Report

This paper is being tabled to present the final version of Trust Estates Strategy for 2025/2030.

2. Detailed summary of paper contents:

This document sets out the current position and the development of a five-year Estates Strategy for the Southern Health and Social Care Trust (SHSCT).

It provides an integrated approach to the estate, relative to proposed service models and supports SHSCT's ambition to facilitate a high quality, patient centre health and social care to the population it serves.

3. Areas of improvement/achievement:

The strategy set out 5 main strategic aims of the Estates team for 2025/2030 being

1. Reduction of our Backlog Maintenance Liability
2. Implementation of our Sustainability Strategy Trustwide
3. Facilitating future clinical and corporate requirements via capital development, based on best available projections and metrics
4. Efficient use of our Estate – with a strong focus on existing assets
5. Developing a Digital Estate

4. Areas of concern/risk/challenge:

The main areas of concern relate to

- Extent of BLM liabilities
- Age of Estates
- Financial pressures on budgets
- Lack of accommodation within Estate to accommodate increasing staffing numbers
- Meeting carbon net zero targets
- Lack of longer term service strategies to inform the Estate

5. Impact on Statutory Duties: Provide details on the impact of the following and how.

Financial Impact

Safety and Quality Impact

Yes, there are Financial Impacts	Yes, there are Quality, Safety or Experience Impacts
6. Risk Assessment (Risk level and state if a risk assessment be completed)	
N/A	
7. Other Business Intelligence/data (If appropriate)	
This is a live document and will be updated annually as required	
8. Impact: Provide details on the impact of the following and how. If this is N/A you should explain why this is an appropriate response.	
Corporate Risk Register	<p>Backlog maintenance as referred to within the strategy is considerable and requires significant investment to remedy.</p> <p>Estates budgets under significant pressure due to aging Estates, lack of capital redevelopment and inflationary pressures on servicing and maintenance contracts</p>
Board Assurance Framework	<p>The items identified within the report would typically be identified and escalated through the following assurance groups:</p> <ul style="list-style-type: none"> • Strategic Accommodation Group • Strategic Investment Group • Estates Governance Group • Capital Allocations Group • Sustainability, Carbon and Waste Committee
Equality and Human Rights	<p>This Estate strategy needs to ensure that the development and management of estates do not discriminate against any group and uphold the rights of all individuals. Key considerations include access to services, fair treatment, and protection from harm, all while adhering to relevant legislation and guidance</p>

Trust Board Role Fulfilment

Strategy	<i>Papers in this category should address forward-looking priorities, long-term objectives, or service transformation. These are typically focused on shaping the future of the organisation and will often involve decisions on direction, investment, or innovation.</i>
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Culture	<i>These papers aim to influence or reflect the values, behaviours, and staff or patient experiences within HSC. They may relate to leadership development, equality, diversity and inclusion, staff engagement, or initiatives intended to reinforce our organisational ethos.</i>
Accountability	<i>Papers falling into this area relate to governance, assurance, performance monitoring, compliance, and risk. They provide evidence that responsibilities are being fulfilled, standards are being met, and corrective actions are being taken where necessary.</i>

Reasons for Paper Presentation

Approval	<i>Used when an item requires a formal agreement or endorsement by the meeting / committee members. Examples are approving minutes, budgets, proposals or policies.</i>
Assurance	<i>Used when an item can be measured against a certain criteria / standard. Examples are a project is on course with delivery or financial targets are being met.</i>
Information	<i>Used when an item is presented for the purpose of updating or informing the attendees without requiring a decision or action, such as reports, updates, or announcements.</i>
Discussion	<i>Used when an item is listed primarily for open discussion, brainstorming or gathering input from the members without requiring an immediate decision.</i>