Estate work brief

SITE / SCOPE / AUTHORITY / EVIDENCE

Use one brief for each site or distinct installation. Keep a common programme reference where work spans an estate, without losing the local instruction. Complete the prompts from records already available; mark missing information rather than guessing.

01 Define the instruction

Describe the result needed and the issue prompting the work. Separate the observed symptom from any suspected cause. Record when it started, whether it returns and the effect on people, property use or operations. Link a recurring fault to its earlier job reference.

Programme / job reference and prepared by

Required outcome, observed issue and timing

02 Site and asset information

Give the full address and a precise room, floor or external location. Use the existing asset reference where available. Attach relevant reports, manuals and previous repair information, noting the source of each. A missing identifier should remain an explicit gap in the instruction.

Site address, location and asset reference

Existing records / attachments and information still needed

03 Operating constraints

Identify the local contact, occupied areas, access windows and work that must continue. Record any shutdown, escort or coordination requirement to be agreed. Explain how authorised access will be arranged; keep access secrets outside this worksheet and use the site's approved process.

Local contact, available access and operating restrictions

Use existing evidence and photographs taken from a safe position. Do not climb, remove covers or enter a restricted area to complete this brief. Immediate danger needs the relevant emergency route; gathering information must not delay urgent reporting.

Agree the work. Keep the result.

Use with the site or property details on page 1.

This worksheet helps prepare a maintenance or project instruction. It is not a technical inspection, a compliance certificate, a quotation or approval to start work. Retain it with the agreed scope and update the record when decisions or responsibilities change.

04 Scope and authority

Define the assets or areas included and what is excluded. Identify who can approve the initial work, expenditure and later changes; the access contact may hold none of those roles. State any assessment, specification or permission question that must be resolved before the instruction can proceed.

Included work and exclusions

Approver, authority limits and decisions still required

Additional findings: who receives them and how a change is agreed

05 Completion and follow-up

Agree what a completed task will show: the work performed, relevant checks, findings and any documents required. Keep completed work separate from an inaccessible item or follow-on repair. Give every unfinished action an owner and next step, using the site and asset references above.

Completion evidence required and person receiving it

Outstanding action / owner / next step or review date

Before sharing: check that each attachment belongs to this site, remove unnecessary personal or sensitive information, identify the current version, and confirm which decisions remain open. Completing or sending the brief does not confirm attendance or authorise work.

Guidance and current resource: blackandwhitefacilities.co.uk/knowledge-centre/downloadable-resources

This worksheet follows the fault-reporting, task-record and property-handover guidance linked from the resource page. Keep the completed copy within your own property records.